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Approaching Post-Socialist and Post-Authoritarian Education

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Approaching Post-Socialist and Post-Authoritarian Education

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Still an issue?

Approaching post-socialist and post-authoritarian education

Tatjana Zimenkova

Since the last few decades, scholars from different disciplines have been concentrating on educational policies and practices in post-socialist and post-authoritarian spaces. Many research designs that focus on post socialist and post-authoritarian countries (in the area of education) are based on the implicit idea of the relevancy of post-socialist and post-authoritarian path dependencies (Stark 1992) in education. In this volume, path dependencies are to be understood broadly; they refer to difficult-to-grasp phenomena regarding the lasting influences of the past (e.g. educational policies of the authoritarian era, educational concepts and curricula, etc.) or to the lasting effects of transformation on educational processes (e.g. educational policies, but also how educational praxis is affected by the experience of structural change even if the political and education system have meanwhile been stabilized, educational curricula established, and teacher education reformed (see Hedtke, Hippe, and Zimenkova 2007). Path dependencies are generally considered an important factor in empirical educational research and serve as an explanation for the specifics and developments of educational systems, didactical approaches, teachers' self-understanding, learning environments, and the contents of educational materials and practices. Hence, educational processes and their developments are seen, at least partly, as a product of the past and as being incomprehensible without reference to the (authoritarian) past (Niyozov 2011).

Critical voices claim that strong expectations of path dependencies might obscure new developments in the field of education, pressing them into

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the explanatory framework of the post-authoritarian or post-socialist system. Further scholars claim that post-authoritarian or post-socialist policyscapes are specific spaces in their own right (Silova 2011; **Jules and Barton**, in this issue) and should be studied by scholars of education independently from other spaces and other historical contexts such as globalization or Europeanization.

Turning away from path dependencies, we find a comparative perspective on post-socialist and post-authoritarian education. One strain of researchers claims the impossibility of comparing post-authoritarian and post-socialist educational spaces, while others believe we can learn a lot from comparison (Hedtke and Zimenkova 2012; Ferreira et al. 2012). Moving forward, scholars of globalization plead for restraining from »post-XX« perspectives when approaching education in order to grasp commonalities emerging beyond the margins of path dependencies.

Despite their tensions, all these approaches see macro-political changes and developments as influential factors which cannot but find expression in educational policies or/and practices, be it in the form of curricula, teachers' attitudes, learners' perception of the educational setting, educational climate, or other aspects.

This issue neither insists on the concept of path dependencies as the ultimate explanatory scheme for post-socialist and post-authoritarian education, nor does it argue against their explanatory potential. Rather, while addressing many other aspects and foci in the study of *post-* education, the issue seeks to elucidate the challenges of the empirical detection of post-dependencies (or of their irrelevancy) in the study of educational phenomena and materials.

The idea of path-dependencies in education is not only relevant for educational sciences. The specific didactics of different disciplines, from languages to social studies, from history to political science, are also turning their attention to the possibilities of path dependencies in post-spaces in education and their meaning for the specific learning theories and practices of the respective disciplines. Some authors claim to be able to detect specific post-socialist indicators in, for example, history teach-

ing (e.g. addressing the »national congruence« of a country as a special mark of post-Soviet history teaching (Geller 1997)). In civic and political education, there have also been some attempts to make path dependencies visible, as some authors believe that in post-socialist or post-authoritarian contexts, nation-centred, patriotic or nationalist educational discourses are likely to emerge (Gross 2010, 215), which appeal to the construction of national (post-socialist) identities (Heyneman 2000, 180–82). The complexity of the task of detecting path dependencies in post-states rises with other macro-political influences on education, such as Europeanization or globalization. These developments put educational policies, systems, and actors on all levels into situations with varying tensions, e.g. between the »rationalities of nation-state building« and the »rationalities of catching-up with Europe« (Fimyar 2010, 64).

On the level of the actors involved in the educational processes, the (ir)relevance of path dependencies is perceivable in questions about the uncertainty of knowledge production (Lindblad and Popkewitz 2004, ix) and about the teaching profession (Niyozov 2011) regarding both the institutional risks and contents of educational practice. It has become both inevitable and impossible to speak of path dependencies in education, there is lack of established instruments designed to detect or reject the assumption of post-socialist or post-authoritarian path dependencies in concrete empirical cases. I have attempted to develop a draft instrument for post-socialist/post-authoritarian dependency analysis, which I open to discussion among the audience of this special issue.

The *Draft instrument for detecting post-Soviet and post-authoritarian dependencies in social sciences and humanities education* developed by **Tatjana Zimenkova** can be found in the **Annex** of this issue. This draft instrument defines some indicators for detecting path dependencies in education. The instrument was developed for the sphere of citizenship and civic education, but can also be used for the analysis of materials from history and social studies and other related subjects. Based on previous research on path dependencies and breaks in educational processes (see, for example Fimyar 2010; Gellner 1997; Gross 2010; Lindblad and Popkewitz 2004; as well as **Jeliazkova**; **Jules and Barton**; and **Vitrukh**, all in this issue),

the instrument develops categories and guiding questions to be used for the analysis of teaching materials, curricula, and educational programs as well as with interviews with educators that focus on the relevancy of path dependencies. The instrument seeks to provide the researcher with orientation for questions such as: Can the material analysed be considered an expression of path dependency? And if so, is this path influence expressed as continuity or as a break with educational tradition? I am thankful for any criticism of and comments on the instrument.

Keeping in mind the different and partly conflicting perspectives on the issue of post-socialism in educational research, this special issue of InterDisciplines: »Still an issue? Approaching post-socialist and post-authoritarian education« brings together scholars reflecting on empirical approaches to post-authoritarian and post-socialist education. The issue unites reflections on possibilities, problems, challenges, routines, and grand narratives of post-socialist and post-authoritarian educational research. Some challenging questions that guided the emergence of this issue are: Do post-socialism and post-authoritarianism still play a role in the conceptualization and routine of empirical research on education? Are there common trends in research on education within post-socialist and post-authoritarian spaces? This issue seeks to detect the disciplines that are occupied with research on post-authoritarian and post-socialist spaces, to describe the methodological debates influencing research designs and research approaches in this sphere, and to demonstrate empirical approaches developed in order to approach post-authoritarian and post-socialist education.

Luckily, we[1] were able to find inspiring authors who bring different perspectives on post-spaces and their importance or irrelevance to educational research. Some of the perspectives presented here are surprising and some cases unknown to the general public. The complexity of the field of post-authoritarian and post-socialist education—its

1 Here I want to thank Olena Fimyar, who, as a discussion partner, inspired me to edit this volume. I am thankful for her work, time, fruitful comments, and communication with the authors.

interdisciplinary nature, and its common fundamental questions—becomes visible if one looks at the multiple interconnections between the articles in this volume on the level of theory, methodology, research questions, and empirical approaches. Although unfamiliar with each other's work, working in different countries and different disciplines, and elaborating on different phenomena, the authors of this issue demonstrate astonishing commonalities and fruitful interconnections. I have tried to highlight some of the interconnections between the articles in this editorial, however I am certain readers will discover many more, both between the articles and most likely with their own research as well.

The articles' order of appearance is designed to demonstrate the added value of an interdisciplinary approach. Following the interconnections within articles, theoretical and methodological considerations are introduced that are helpful to understanding the approaches in the articles that follow. Naturally, the order of appearance corresponds to the editor's perception of the main challenges of the topics; the reader might find very different connections and argue against the logic suggested here. The editor and the authors are thankful for any further ideas on the interconnectedness and added value of the research presented in this volume.

The volume starts with an article by **Elena Minina**, who approaches the transformations and post-dependencies in the educational sphere through the lens of the neoliberal idea of »educational standardization« and its public perception. The author looks at the benchmark of local pedagogical practices and preferences in the modernization and reform of post-Soviet education in Russia. Approaching the issue with the help of discursive methods, the article contributes to the consideration of post-spaces in the research on education from the cutting edge between policy and discourse research. Minina draws from an enormous database, comprising both official discourse (which positionings »educational standard« as a principle of educational provision) and public discourse (which interprets the same as a reduced list of school subjects subsidized by the state). The rich database allows Elena Minina to contrast the interpretative schemes underlying neoliberal and local interpretations of

educational standards and to expose several points of tension surrounding the concept of educational standards. Her methodology makes it possible to detect concepts at the linguistic, metaphorical, and conceptual levels. Her argumentation takes place along two conflicting frameworks within the standardization debate: state control and pedagogy. One side embraces authoritarian pedagogy and the state monopoly over education, the other is rooted in the local pedagogical tradition of *vospitanie* through creative learning (here we find references to the self-perceptions of educators as addressed by **Margarita Jeliazkova and Mariya Vitrukh** in this issue). Elena Minina demonstrates impressively how, even whilst sharing initial points of reference, values become reversed in the public and in the official discourses. Within this normative evaluation, post-references play an important role: official discourse opposes the progressiveness of educational standards with the »grey uniformity« of Soviet-era schooling, while public discourse frames the standardization reform as a total displacement of personality. Demonstrating the degree of inconsistency originating from the official rhetoric, which creates confusion in the societal debate and obscures the direction of reform, the author makes an important contribution to the discussion of local and pedagogical specifics of post-spaces and of reform processes (here we find relevant references to the approach of **Tavis D. Jules and Teresa Barton** in this issue).

Margarita Jeliazkova addresses the challenging topic of the possible irrelevancies of path dependencies in her comparison of high school social studies teachers' views on citizenship education in three European countries: the Netherlands, Bulgaria, and Croatia (teachers' professional self-understanding is also looked at by **Mariya Vitrukh** in this issue). Approaching the topic with specific questions central to the didactics of citizenship education, Jeliazkova challenges the idea of path dependencies empirically through her comparative approach. Posing questions that address the area of professional self-understanding within citizenship education—for example: What kind of citizens do they hope to educate? How do they cope with the challenge of finding a balance between neutrality and indoctrination, etc.—to over 60 teachers in the

three countries, the interviews use both quantitative and qualitative methods. This mixed methodology resulted in variations of four ideal types of views: hierarchical, individualist, egalitarian, and fatalist. The research finds both shared ideas of professional standards among the teachers in all three countries and differing lines of argumentation supporting these standards, thus showing the ambiguousness of the assumption of path dependencies. While demonstrating that group-grid theory as an overarching framework within Q-methodology is a suitable instrument for cross-country comparison, Margarita Jeliazkova shows that this method is essential for the study of (possible) path dependencies, as it allows analysis of genuine interpretations by practitioners without pre-set measures and imposed meanings. The method makes it possible to reflect on the internal diversity of »national contexts« (here an interesting interrelation to the article by **Elena Minina** emerges) and thus to avoid the bias of cultural and political labelling, a point especially relevant for »post« studies.

In her article, **Mariya Vitrukh** touches upon teachers as educational agents in post-spaces and examines their professional identities, discussing the lived experiences of practicing academics in Ukraine (**Margarita Jeliazkova** in this issue analyses teachers' professional self-understanding in post-spaces from a *subject-specific* perspective). Mariya Vitrukh approaches the issue of professional identity from a psychological perspective. She uses the lenses of social identity theory, Kelchtermans' (1993) model of professional identity, and Connelly and Clandinin's (1999) approach to teachers' professional stories as the theoretical basis for her research. Her article opens up perspectives on the group, unfortunately not yet the object of many researchers attentions, and reconstructs the stories university teachers create about their current professional identity. She demonstrates how these identities evolved through their experiences as university teachers and how their professional stories interrelate with their working environment. Based on her (small-scale) data, Mariya Vitrukh demonstrates the shift from a teacher-centered approach to other approaches such as student- or subject centred, within the department under research. In this article, many

aspects of the (ir)relevance of post-socialist dependencies are articulated: the changing role of knowledge (relevant for both post-socialist education and education in the era of globalization), the changing role of teachers in society, as well as education reforms and their ambiguous impact on teachers' identities and teaching practices. The reform(s) appear to be one of the phenomena that play a central role in the research on post-socialist and post-authoritarian education (see also **Elena Minina**'s impressive research in this issue). The description of the specific meanings of the reforms, their emergence, and their (re)framings through the education system and its actors leads to the work of **Tavis D. Jules and Teresa Barton**.

Tavis D. Jules and Teresa Barton use Tunisia as a case study in order to examine developments in higher education within transitory democratic spaces. They raise the question of whether and how the revolution acts as an agent of educational contagion as new ideas are imported and old ones realigned in the search for national competency and international legitimacy. Their study explores the emergence of post-revolutionary reforms using the case of Tunisia's recent movement from revolution to elections. With the help of content analyses of Tunisia's higher education policies in the pre-and post-revolutionary period, the authors reconstruct the actors and institutions that facilitated, guided, and supported reform initiatives while looking at the interconnectedness of revolutionary changes and educational transformations. This study seeks to describe why states import new educational reforms on a theoretical level and to delineate who is responsible for these reforms. Jules and Barton thus discuss a very special case of missing path dependencies, in which a strong focus on education brought about societal breaks through people who were enabled through education to change the political system they were brought up by (a fascinating counterpart to this case is described by **Ekaterina Protassova** in this issue). This article is an important contribution to the discussions on »post«-spaces in education, framing »post« as a break, not as a dependency.

Irina Mchitarjan approaches the question of path-dependencies from a historical perspective, thus enriching the spectrum of the issue with one

more disciplinary view. Her focus is the educational policy of (nation-)states towards sociocultural minorities. She studies this issue using the example of Russia's educational policy for minorities during history, tracing its developments and specifics from the beginnings of the Russian state until the dissolution of the Soviet Union. Covering this broad time span makes it possible to see historical continuities as well as changes in Russia's educational policies for minorities (this focus on dependencies and changes approaches the topics also raised by **Margarita Jeliazkova** and **Tavis D. Jules and Teresa Barton** in this issue, however it contributes to this topic from a very different perspective and within a different temporal frame of reference). The article is based on a theoretical analysis of educational policies for ethnic minorities. For this analysis, Mchitarjan uses the theory of cultural transmission in minorities, developed by the author herself (Mchitarjan and Reisenzein 2010, 2014, 2013). The study aims at a theoretical understanding of Russian educational policies for non-Russian minorities, thus contributing to the history of education from the perspective of historical sociology. After summarizing the theory of cultural transmission in minorities; Russian educational policies for minorities are analyzed from the perspective of this theory. Thus the article brings an essential perspective and an elaborate knowledge base into this special issue of InterDisciplines. The frame of reference suggested by **Irina Mchitarjan** is an essential contribution to understanding the issue of minority language education. The theoretical framework presented by **Irina Mchitarjan** also contributes to understanding the developments of bilingual education in Udmurt and Chuvash described by **Ekaterina Protassova** in this issue.

Ekaterina Protassova approaches an under-researched topic: bilingual education in Russia after the end of the Soviet Union. Bringing in rich data from interviews and school statistics and policies regarding post-Soviet transitions in minority language and bilingual education, Ekaterina Protassova delves deeply into the vanishing of Udmurt and Chuvash as minority languages in Russia (both as a statistical reality and as a subjective feeling many native speakers have). Demonstrating specifics of the Russian Federation's bilingual education, Protassova elaborates on

phenomena such as language frontiers between cities and villages and shows how they are reflected in the school system. Her complex analysis detects the ways in which the legacy of Soviet-era educational policies, processes of globalization and urbanization, teacher shortages, and the general belief that the Russian language is an essential competency in professional life influence the situation of the Udmurt und Chuvash languages. Addressing the issue of multilingual education in today's Russia, the author puts her focus on a description of the changes in education for minority language speakers during the years of post-socialist development (for a broader understanding of the history and development of educational policies towards so called ethnic minorities in Russia, see **Irina Mchitarjan** in this issue). The author suggests that the educational policies and educational practices regarding the so called minority languages have resulted in the vanishing of these languages and should be understood as a negative example of how post-Soviet policies have learned from Soviet history. The autonomization of minority peoples (through their languages) is seen as a threat to the nation-state and homogenization with the help of one majority language (Russian) is deemed beneficial to the sustainability of the state (here we see a fascinating link to the article by **Tavis D. Jules and Teresa Barton** in this issue as regards education as a catalyst of change or revolution).

Bringing together different perspectives, empirical and theoretical research, and a disciplinary and methodological plurality of approaches while presenting fascinating work based on large amounts of data and innovative and courageous research approaches, the authors of this volume not only exhibit a great deal of expertise and open up windows for under-researched topics. They elaborate, each for her- or himself, the central terms of post-spaces in educational research. They challenge the very idea of path dependencies with their research, and they challenge themselves while addressing the difficult topic of path dependencies. At this point, my great thanks goes to the authors who accepted the challenge to work on this topic and to managing editor Sabine Schäfer, who supported me and the authors through this process, as well as to the

reviewers, whose difficult work included re-considering their own notion of post-spaces and taking in so many very different perspectives.

Having started an open call for papers, the editor becomes an observer of momentum, that which Germans call *Eigendynamik*, the internal dynamics of developments. For me as editor, reading the articles and reviews and discussing them with the authors was very fruitful. It helped me to detect some commonalities of the research, some common challenges and gaps, as well as common approaches, once again demonstrating the fascinating possibilities and outcomes of interdisciplinarity. The awareness of the challenges of research on post-socialist and post-authoritarian education that arose from this exchange led me to develop the *Draft instrument for detecting post-Soviet and post-authoritarian dependencies in social sciences and humanities education* (see **Annex**); I am looking forwards to discussions on the instrument's development.

It was fascinating to see how many parallel issues the authors raised in their papers. It was a great pleasure of my work as an editor to establish cross-references between authors who do not know each other and who shall most definitely profit from each other's work as soon as this volume is published. Along with our general readers, I wish the authors great joy reading the fascinating and corresponding articles of fellow authors, and I am looking forward to further discussions.

The authors' focus on both policies and public discourses, their understanding that mixed methods as well as interdisciplinarity are needed to approach the issue, their interest in the identities and self-perception of educators, their framing of education as subject and object of change—all these facets of research on education make up this issue and contribute to the question posed at the very beginning of the long process of editing: whether the authoritarian past is »Still an issue?«

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Why doesn't the telephone ring?

Reform of educational standards in Russia

Elena Minina

Problem statement

Comparative education scholarship has established that neoliberal globalization has played a determinant role in shaping the agenda of education reform worldwide (Giddens 1990; Bennett and Howlett 1992; Ball 1998; Marginson 1999; Lindblad and Popkewitz 2004; Carter and O'Neil 1995; Lingard and Ozga 2007). While the general direction of national reform policies has been shaped by the global »travelling policies« (Lindblad and Popkewitz 2004), the latter have been significantly »affected, inflected and deflected« (Ball 1998, 127) by the prism of national values and traditional structures of meaning. The discursive interaction between the two has called forth significant ideological tensions, triggering unorthodox local responses and resulting in multiple, often contradictory, articulations of the global in the process of educational change (Fairclough 1992; Carter and O'Neil 1995; Ball 1998; Marginson 1999; Lingard and Ozga 2007).

Facilitated financially and conceptually by stakeholders in global education and driven by domestic political elites, the modernization reform of Russian education (1991–ongoing) is one controversial example of global neoliberal travelling policies in the sphere of education. The global neoliberal orthodoxy of a free market, scholastic excellence, standardization, and quality control has informed Russian educational policies since the early 1990s—driving the reform agenda and providing the backbone for the new ideology of education (Bray and Borevskaya 2001; Birzea 1994; Gounko and Smale 2007; Silova 2011; Bain 2011). Modelled on quality assurance in commercial industries, the concept of *standardization*

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of education constituted the core of educational reform in Russia. However, despite generous state funding and extensive administrative restructuring, public attitudes and educational practices related to the standardization of education have proven largely resistant to change, prompting international and domestic observers to assess the reform as a »crisis« or a »failure« (World Bank 1999; OECD 1999; Collier 2011).

Using the case study of standardization reform in post-Soviet Russia, this article asks how global scripts are received, adopted, resisted, and internalized by regional policy-makers, university administrators, teachers, students, and parents in the process of policy reform. Which pre-existing cultural frames of reference, ideological preferences, and value judgments do local actors draw from in the process of de-coding novel educational concepts? How do indigenous social meanings affect educational change? Employing various linguistic, textual, and discourse analysis methods, I engage with contemporary public debate on educational standardization as a key and contested site at which socio-cultural meanings are secured in the sphere of education.

The source data for this article was collected via field, library, and internet research as part of the author's doctoral studies at the University of Oxford (2009–2013). Covering the period from 1991 to 2011, the corpus comprises five sets of data: 1) a comprehensive compilation of state law, official governments statements, and transcripts of parliamentary hearings in Russia's State Duma; 2) sociological data produced by polling agencies; 3) public statements, publications, and round-table discussions produced by professional pedagogical associations; 4) national and regional media coverage of educational issues; and 5) public discussions online, on the radio, and on TV.[1]

1 The official statements and transcripts are publicly available on Russian government websites, such as mon.gov.ru, standart.edu.ru, archive .kremlin.ru and zakonoproekt2011.ru. Sociological and polling data includes research produced by such agencies as Russia's Independent Polling and Sociological Research Agency Levada-Center (levada.ru), Public Opinion Foundation (fom.ru), Electronic Monitor for the Development

I draw on these sources as discursive instances of wider social practices to identify the migration route of neoliberal ideas from global → official → public and to highlight points of tension between the novel and the local. I start by illustrating the way in which standardization reform was developed in convergence with policy recommendations made by foreign actors, rather than through consultations with domestic pedagogical communities. I proceed by analyzing the presentation of the new concepts in official government discourse, contrasting these concepts with nationally-based practices and preferences. Through a comparison of the interpretative schemes underlying neoliberal and local interpretations of educational standards, I uncover a number of lexico-semantic discrepancies built into the public reform narrative. Using a variety of discursive techniques, I demonstrate how these discrepancies have resulted in conceptual confusion in both the public and the policy-making domains, mobilizing public resistance and impeding the reform process. I deconstruct widespread resistance to reform by uncovering cultural metaphors underlying negative interpretations of *educational standards*. I then provide some cultural explanations for the perceived failure of standardization reform in Russia, and conclude with the findings' broader theoretical implications for the study of educational change.

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of Education (kpmo.ru) and others. Professional pedagogical publications included such popular national outlets as *Uchitel'skaya Gazeta* (The Teachers' Gazette), *Pedsovet* (Pedagogical Council), *Pervoie Sentiabria* (September the First) *Zavuch Info* (Headmaster's Information Bulletin) and *Uchitelskii Portal* (Teachers' Portal). National media was represented by such outlets as *Echo Moskvy* (Moscow Echo radio broadcaster), *Pust' Govoriat*! (Let Them talk!, national talk-show on Russian's Channel 1), as well as dozens of national newspapers, including *Argumenti i Fakti, Moscow News, Izvestia, and Nezavisimaia Gazeta.* Online public discussions are available on various platforms, including *Net Reforme Obrazovania!* (National movement No to Education Reform! netreforme.org), state-initiated open public discussions of the 2010 Law on Education (zakonoproekt2011.ru), various parent's portals (kid.ru, ya-roditel.ru, and ped-kopilka.ru) as well as official government websites (kremlin.ru, mon .gov.ru, ege.ru, council.gov.ru, and blog.da-medvedev.ru). All translations from the Russian by the author.

Background: The reform of educational standards in Russia

The notion of outcome-based standardization is relatively new to the educational architecture of modern Russia. Despite the iconic uniformity of governance, facilities, and academic programs, up until the early 1990s, the system of Russian education had been predominantly input- rather than outcome-based. In Soviet times, standards of teaching and learning were *de facto* ensured through unified curricula content and textbooks, standardized teacher training, strict timetables, and a strong culture of personal commitment among teachers and students (Alexander 2000). Up until the introduction of the concept of educational standards in the 1992 Law on Education, curriculum content was stipulated by two normative documents, the »basic educational plan« and the »suggested curriculum,« which served as a set of minimum requirements for each level. With curricular guides and teaching methods poorly defined, the classroom routine was left to the discretion of individual teachers and university instructors, and varied greatly across Russian schools and regions. Regional disparities created unequal educational opportunities for students from urban versus rural areas, leading to a growing educational divide and serving as an instrument of social stratification (Bibkov 2010). After persistent lobbying by international stakeholders, primarily the World Bank and the OECD, in the early 1990s the Russian government launched a comprehensive reform of educational standards[2] based on a framework for the standardization of decentralized educational systems[3] (Smolin 2005b). The reform was meant to address the main chal-

2 There is a distinction between the standards for general, professional, and higher education. While all levels of education are to a greater or lesser degree regulated by the state, general secondary education is considered the state's specific preserve, as defined by Russian legislation. Standards for professional education, in turn, are meant to serve as a basis for performance evaluation and state accreditation of educational institutions.

3 Although in theory this set of policy tools is standardized, specific conceptualisations of the standards-based reform varies greatly across national contexts. Thus, in the Anglo-Saxon world the discussion on standardization is often confined to issues of basic numeracy and literacy and

lenges of improving academic performance, preserving uniformity of education across regions, and creating unified criteria for state accreditation and quality control. In keeping with international demands for defining educational standards in terms of specific measurable outcomes, the Russian government developed a standards-based reform package including such policy tools as curriculum specifications, institutional accountability structures, and a standardized measure of academic performance through the introduction of a nationwide Unified State Examination.

The 1992 Law on Education defined educational standards as a »set of nationally recognized requirements« stipulated by the state that determine a mandatory minimum for educational program content, the maximum workload to be assigned to students, and performance requirements to be met by graduates of educational institutions (Article 7). The newly introduced concept was promptly condemned for being underdeveloped on both the legislative[4] and the conceptual level, as well as for continuing to be »defined as inputs to the learning process rather than as student outcomes« (World Bank 1999, 3) and »expressed only in terms of content covered (input) and hours on the timetable (process) for each subject, rarely in terms of student outcomes« (OECD 1999, 65–66). A 2005 self-assessment by the Russian Ministry of Education acknowledged that the decade-long development of educational stand-

measurable outcomes thereof, while in Asian countries, such as South Korea or Japan, it embraces creative thinking and independent learning.

4 »Curriculum« was legally defined as either »conditions for delivering educational programs« or »requirements for educational results.« In earlier versions, standards were defined as »the basis for the objective assessment of educational level and the qualification of graduates […]« (the 1992 Law, Article 7), while in subsequent amendments (1995, 2009, 2011) they were defined as »a set of requirements for the implementation of basic educational programs […] by state-accredited educational institutions.« »National standards,« »minimum educational content,« »minimum requirements« and »curriculum« were loosely defined and used inconsistently and interchangeably.

ards had failed to result in a policy document that »would satisfy all educational stakeholders« (Government of the Russian Federation 2005, 11).

Under heavy domestic and international criticism, Russia's Ministry of Education made an attempt to re-frame the concept of standards within domestic pedagogy paradigms. The revised concept was proclaimed the »first scientifically-based« and »principally new and unprecedented education endeavor« (ibid., 15). Echoing the rhetoric of international policy recommendations, the second generation of educational standards was said to have been, for the first time, »formulated in the language of outcomes« (ibid.). The new educational standards were positioned within a larger humanistic paradigm, in which a »standard« was not merely a unit of educational content but a »social contract« between an individual, the society, and the state, with learners' developmental needs proclaimed to be of supreme value. The new, *learner-centered* and *competency-based* paradigm of educational standards was explicitly construed as in opposition to the old *transmission of knowledge* paradigm:

> In lieu of the existing standards that boil down to a minimum of information (knowledge), we are offering a standard based on different principles—principles of variability and redundancy of knowledge. […] For the first time, the state standard mentions the school of critical thinking. (Government of the Russian Federation 2005, 20)

Presented as a new discovery, the school of creative pedagogy associated with the names of Russian developmental psychologists Lev Vygotsky and Daniil Elkonin was declared a »scientific base« for the new conception of educational standards and framed in terms of a revolutionary leap towards global progressive educational policies.

In 2010, a draft of the revised, third generation, standards for general education was published on the federal web portal standard.edu.ru, inviting open nationwide public discussion. Despite the continued rhetoric of »novelty,« the document defined educational standards in the same way as the 1992 law, namely, as a »set of state requirements.« The draft law divided the requirements into three groups: 1) requirements for learning

outcomes, 2) requirements for the structure of basic educational programs and 3) requirements for the implementation of those programs. In addition to specific curriculum content, »personal parameters« of student development were introduced for the first time. For instance, learners were now expected to acquire over four hundred specified »key skills,« including »love of their region and love of their motherland,« »respect of its people, its culture, and spiritual traditions,« »acceptance of traditional family values,« »advocacy of a healthy life style,« and the »ability to make conscious professional choices.« In addition, the revised standards divided the formerly compulsory minimum curriculum for general secondary school education into core and elective components, thus *de facto* introducing the principle of subject choice into Russian secondary schools. However, as far as official definitions are concerned, the notion of educational standards remained essentially the same from the 1992 law to the 2010 draft Law on Education. They continued to be defined in terms of unspecified »requirements,« either requirements »for the implementation« (*trebovania k realizatsii*) or »for the condition of the implementation« (*trebovania k usloviam realizatsii*) of educational programmes. Amidst self-referential and circular definitions, the principle questions of what comprises the requirements, and which mechanisms and agencies would ensure the fulfilment of those requirements remained unanswered.

Reform controversy in public debate: confusion and resistance

The standardization reform caused unprecedented public outcry, and the word »standard« became the buzzword of a reform debate dominated by controversy, confusion, and resistance. Although in official rhetoric standards were conceptually richer than the more familiar »curriculum« (*programma*), the pervasive interpretation of *educational standards* in the public mind was a »fashionable« »Anglophone« synonym for curriculum. In public discourse, the term was commonly referred to as »an empty box,« (kid.ru, accessed October 10, 2012) »a fashion whim« (ibid.) and »just a label« (rol.ru, accessed October 10, 2012) that had been »artificially implanted« (ibid.) into the Russian system of education. Curricular

standards were criticized for either being void of essence (»redundant,« »empty,« »just a package,« »a pretty box that's empty inside«; rost.ru, accessed October 10, 2012) or for being too abstract and declarative (»resembles agitprop«), while the uniform nationwide standardized test came to epitomize a »three letter outrage« (Smolin 2005b, 41). Educational standardization was commonly perceived as a by-product of »bureaucratic games« played by an incognito pro-Western law-maker, as illustrated by the quotes below:

> Could someone please tell me, what exactly was wrong with Soviet education and why it was necessary to trade it in for the American system? (kid.ru, accessed October 10, 2012)
>
> The new standard destroys the best of what was created within the Soviet and Russian system of education. (rol.ru, accessed October 10, 2012)
>
> The educational standard only exists in some bureaucrat's head. (*September the 1st* [newspaper], August 2007)

The debate often evoked suspicion of Western conspiracy and was framed in terms of »brain drain,« »dumbing of the nation,« and »destruction of Russian education«:

> Don't the pedagogical elite understand that the so-called »standardization« of Russian education to meet global requirements only strives to facilitate brain drain to Europe and the USA? (uchportal.ru, accessed October 10, 2012)

Sergei Lisovsky, an influential public figure and senator of the Russian Parliament's Federation Council, claimed that standardization reform amounted to the »total destruction of educational quality in Russia« (interview in the *Teachers' Gazette*, January 2006). Seen as a product of pernicious Western influence, standardization reform was widely perceived as a hindrance to the educational process: »burden for teachers,« »makes it impossible for teachers to work« (uchportal.ru, accessed October 10, 2012). Sarcastic headlines such as »The tale of woeful standards« routinely made national newspapers. Anti-reform Duma deputies called

educational standards »just an official letterhead« for the existing specifications of educational content (transcripts 2009). Russian pedagogical communities castigated standardization reform as »nothing but good old school curriculum formulated in exceptionally dry, vague, and generic terms« (Council 2010).

Along with this overwhelmingly negative perception, there was widespread confusion surrounding the interpretation of the term »standard.« Alexander Adamsky, rector of Eureka, a Russian educational policy institute, called the final version of the new educational standards »a peculiar Russian reading comprehension test« (interview on eurekanet.ru, February 2011). The term »standards« was commonly preceded by the modifier »so-called,« and its precise lexical meaning was problematized throughout the reform debate, from lay public discussions to policy-making debates in the Duma. The confusion revolved around two key questions: What does the term standards mean and whose requirements are these and for whom? A question posed by a regional school teacher on a popular pedagogical forum summed up the nature of public confusion about the term's definition: »Does ›standards‹ mean minimum, maximum [of educational content] or something in between?« (pedsovet.org). The second problem was expressed as follows by prominent Russian politician and opposition leader Oleg Smolin:

> Instead of a standard for the conditions of educational process guaranteed by the state (that is, a set of requirements that the school, parents, higher education institutions, or students can put forward *to* the state) we are presented with something different: »requirements for the conditions for the implementation of basic educational programs.« Whose requirements? For whom? It is clear from the context of the law that these are state requirements *for* the school, which is exactly the opposite of what the community expects. (transcripts 2005)

In summary, the overwhelming public attitude to educational standards remained one of perplexity and rejection. A metaphorical statement by Anatolii Gasparzhak, rector of the Moscow Higher School for Social and

Economic Sciences that made headlines in 2010 is representative of public sentiment: »The new educational standards resemble »the marble telephone from the Soviet-era fairy-tale Old Khottabych. It looks like a telephone, but it doesn't ring.«

In the following sections, I demystify the confusion surrounding the definition of the novel concept through a comprehensive textual analysis of the standardization reform debate, including an analysis of the lexical dynamics of the word »standard« and a grammatical/semantic analysis of official policy texts.

»Minimum, maximum or something in between?«—The lexical dynamics of »standard«

I begin with the analysis of lexical meanings of the term *standard* across semi-official spoken genres and official written genres, focusing on contextual »use-meanings« and discourse-specific semantic valences of the word within the debate on education reform (Lemke 1995). Using the search function within the data corpus, I identified instances of use of the word *standard(s)* and engaged the broader context of the debate, ranging from a sentence to a few paragraphs, to reconstruct the denotative meaning of the term. After marking and coding the lexical value of the word and the domain of use (public, policy-making or official) in each individual instance, I sorted the results by lexical meaning and by domain of use. The analysis revealed three fixed interpretations of the term *standard* in the context of the standardization debate in Russia:

1) *Standard* as a »principle of educational provision and governance« aimed at ensuring fair distribution of educational resources and unifying educational content, as in:

> The New Generation Standard will provide a balance of academic fundamentality and the effective use of [educational] results for innovative development. (Minister of Education Andrei Fursenko, transcripts 2006)

As a general principle of educational management, this usage encompasses all levels of education, from primary school to higher and profes-

sional education, without distinguishing between them. Rooted in the ideology of neoliberal reform, as expressed in international policy recommendations, this usage is limited to official state discourse and is linked to ideas such as »the social contract,« »a balance between society and the state,« »public consensus,« and »agreed-upon requirements« (Concept for National Standards 2005), all of which serve to indicate a broader, abstract meaning as a »principle« or »element« of the system.

2) *Standards* as »minimum mandatory educational content,« including subject knowledge, practical skills, periods of study, and learning outcomes. These are set by the state and complied with by educational institutions. This usage is best illustrated by the following headlines in popular newspapers:

> The state will only finance the standard education (pedsovet.org, accessed October 10, 2012) [»minimum educational content«].
>
> Current educational standards are overloaded with scientific facts (zavuch.info, accessed October 10, 2012) [»specific content of school curriculum«].
>
> The standard is being cut by 25% (novgaz.ru, accessed October 10, 2012) [»new regulations for periods of study, classroom hours, and teacher salary rates«].

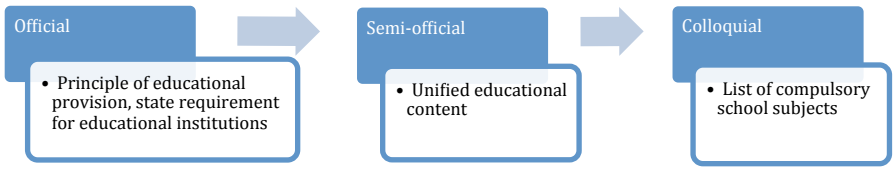
A vivid illustration of this usage in the policy-making domain is the 2008 parliamentary session on educational standardization, which laid the groundwork for new educational content, periods of study, and learning outcomes, titled »content of the standard for general education« (*soderzhanie standarta obshego obrazovaniia*). This usage is conceptually narrower than that of a *principle*. Thematically, it is limited to the discussion of general secondary education reform.

3) *Standards as* »a set of compulsory and free-of-charge scholastic subjects within the modernized educational content.« Appearing in collocations such as »minimum standards« and »mandatory standards,« this usage is exclusive to the context of redesigning secondary school curriculum. Illustrations from the public discourse include:

> If the standard is allegedly oriented to the future why is computer science left off the list of compulsory subjects? (ped-kopilka.ru, accessed October 12, 2012)
>
> I am pro-minimization of the standard. Too much is currently cramped into school disciplines, a critical revision is needed. Take, for example, the useless and worthless topic »phonetic analysis« in Russian class. (nechtportal.ru, accessed October 12, 2012)

This usage, widespread in public discourse, is semantically narrower than the second definition and is not conceptually connected to the broader meaning of *standard* advanced in official discourse: »a principle of educational provision.«

The analysis of the lexical dimension of the reform debate indicates a clear semantic specification that occurs as the term *standard(s)* migrates from higher (official) to lower (colloquial) registers. Specifically, its meaning narrows from the more abstract, formal »principle« to the semi-formal »educational content« and further to the colloquial »list of subjects.«



These lexical nuances provide a useful insight into the widespread confusion over the meaning of the term expressed in the question »Does ›standard‹ suggest minimum, maximum, or something in between?« Indeed, in official discourse, educational standards refer to the »maximum,« in the sense of a fundamental principle of providing education, while in colloquial use it may be defined as »minimum« in the sense of a list of compulsory core school subjects. And in semi-official discourse it is, in fact, »something in between« in the meaning of unified educational

content. Thus, while terminology is shared, participants of the standardization debate draw on distinctly different lexical interpretations of *standard*.[5]

Whose requirements? For whom?—An analysis of policy texts

As mentioned in the opening section, since the introduction of the concept in the early 1900s, the notion of educational standards in official policy has been invariably accompanied by that of »requirements.« Standards and requirements have been contextually cross-referenced and interdefined across policy statements. Thus, standards either »consist of« requirements (*v standarti vkliucheni trebovaniia*) or »include« requirements (*standarti vkluchaiut v sebia trevbovania*). The tendency to define standards in terms of requirements and vice versa was most clearly reflected in the 2010 Law on Education, which defined »standards and requirements« (*standarti i trebovania*) as a single term without providing individual definitions. While standards is a relatively novel idea in Russian educational discourse, requirements (*trebovaniia*) is a familiar concept that draws on the Soviet party-state notion of rigid institutional accountability and emphasizes the hegemonic role of the state in determining the form and the content of education. Such contextual amalgamation of two disparate

5 As is the case with naturally occurring language, lexical meanings are fluid and mutually penetrating, official usage trickles down into the colloquial domain and vice versa. In the context of Russian education reform, otherwise rather isolated written official discourse shows certain rhetorical adjustments to colloquial interpretations. For example, while initially educational standards were positioned as a »principally new« educational phenomenon, the framing of the third-generation standards (2005–2011) has incorporated popular colloquial usage: »*From standards containing a detailed list of topics within each subject that is compulsory for each student, there will be a transition to a new standard [comprising] requirements for educational programs, results that children should demonstrate, and conditions that should be created in schools to achieve these results.*« (Ministry of Education 2005, 49; emphasis mine). The conceptualization of *standard(s)* as a principle of governance, however, has been limited to the genre of education laws and written policy statements.

concepts has triggered legitimate public concerns over the nature of the proposed educational requirements: Whose requirements? For whom? I will demonstrate in this section how public confusion reflects a lack of conceptual clarity in the official discourse regarding the distinction between standards and requirements, as well as the precise roles and responsibilities of various educational stakeholders in ensuring educational quality.

To this end, I carry out a grammatical/semantic analysis of official standard-setting documents using systemic functional linguistics (SFL). SFL interprets meaningful grammatical features, including passive/active modes, present/absent agency, omissions, and synonymy in relation to their social meanings. Drawing on SFL, I used patterns of grammatical association between the two terms to reconstruct the social relations and identities underlying the notion of *standard-requirement*. Specifically, I performed an NVIVO-aided search of data corpus for *standard(s)*, and *requirements* as collocates. I then scrutinized each token for meaningful linguistic features within the broader context of sentence, paragraph, text and discourse formation, and further for significant patterns of use.

The analysis reveals that the default lexical template is a fixed collocation »federal state educational standards and requirements« (*federalnie gosudarstvennyie standarti i trebovania*). Grammatical/semantic analysis of the collocation suggests that standards and requirements are employed by the official discourse as *contextual synonyms,* i.e., words that are not synonymous with each other in semantics, but act effectively as synonyms in a certain institutionalized discourse formation. Linguistic evidence supporting this observation includes two main sets of arguments: semantic and syntactic. From the perspective of semantics, I identified a number of variants of the template collocation, within which a re-positioning of the main and the subordinate member did not affect the meaning of the phrase. Thus, throughout written policy discourse, the default template »federal state educational standards and requirements« spins off into a number of lexical combinations, including:

- educational standards and federal requirements (*obrazovatelnie standarti i federalnie trebovania*),
- requirements of federal standards (*trebovania federalnih standartov*),
- federal state educational standards based on federal state requirements (*federalnie gosudarstvennie obrazovatelnie standarti na osnove federalnih gosudarstvennih trebovanii*).

Used as synonyms across official policy texts, all of these pairings refer semantically to the notion of *educational standards*. Contextual coupling of the two terms is so strong that the template collocation, as well as its variations, is used throughout policy discourse as a set phrase in the context of not only Russian but also international standards, as in »international standards and requirements.«

A similar phenomenon is manifested at the syntactic level. Within the said pattern, »standards« and »requirements« are commonly connected by either a comma or a conjunction, including »or,« »and,« and »as well as,« as in the following examples from the 2010 Law (emphasis mine):

> State control over educational quality in organizations engaged in educational activities located within the territory of the Russian Federation [is put in force] in accordance with *federal state educational standards, federal state requirements* […].
>
> In the event that an educational organization is found to have violated the requirements *of the federal state educational standard* ***or*** *federal state requirements* […].
>
> […] in accordance with *the federal state educational standard* ***and*** *federal state requirement*.
>
> The new scheme provides continuity between supplementary professional programs and *federal state educational standards for professional education* ***as well as*** *the requirements of professional standards*.

Similarly, the term *requirements* is consistently positioned in brackets and functions as a clarification or definition:[6]

> […] identical or thematically similar educational programs within the same *federal state educational standard (federal state requirements).*

Thus, lexically, grammatically, syntactically, and idiomatically, »standards« and »requirements« appear to be semantically merged in the official discourse, with the »requirement« component at the core of official definitions. Educational standards are effectively presented in the state discourse as *government-set requirements for educational institutions*.

In order to answer the second question—requirement for whom—the analysis proceeds to investigate the discursive texture of laws and official policy statements in terms of the allocation of agents in the proposed standard assurance paradigm. I found that the paradigm features three agencies: the state, the educational institution, and the learner. Their precise roles and responsibilities are not legislatively defined and are only loosely described in various official statements. The relationship between the agencies is typically framed as follows (emphasis is mine):

> Educational standards […] set by the *state* serve as a guarantor, or an indicator, of the [desired] level of national [educational] development, as well as of the degree of responsibility placed on the *learner*. Goals, standardized requirements, benchmarks, systems of

6 While requirement is presented as a contextual synonym for standard, the lexico-grammatical distribution of the two terms suggests that the role of the former is dominant. Normally, in terms of *linguistic government,* i.e., grammatical relationship between the word and its dependent, the words »standard« and »requirement« have different distribution patterns in the Russian language. For example, although both standards and requirements can be *met* (*sobliudat'*) or *violated* (*narushat'*), these particular verbs are used predominantly in collocation with requirements and not with standards (Lebedeva 2003; Denisov 1983; Krasnykh 2001). Throughout official policy discourse, however, linguistic governance is consistently determined by the »requirement« component of the pair, suggesting its stronger semantic position within the collocation.

> assessment and control are set at the state level. Norms and conditions guaranteeing the fulfillment of educational needs are established [at the level of the state]. *Educational institutions and teachers* are given an opportunity to participate in designing educational programs and curricula [*uchebnie plani i programmi*] as well as in defining educational content, the sequence of courses, and methodologies. Thus, standards become the basis for the free organization of education. A national system of education with a predominantly regional (local) level of management is thus potentially established. (Draft Law 2010)

Despite the explicit emphasis on its role as guarantor and regulator, the state is virtually removed from the paradigm as an active agent. This is achieved through a number of techniques. As illustrated above, as the *logical* subject of a sentence, the state appears in the grammatical position of an *object* in passive constructions (»educational standards are set by the state« in accordance with state requirements, as opposed to »the state sets educational standards« in accordance with state requirements). Concurrently, »standards« consistently appear as the *subject* in place of a human or institutional agency: »standards set quality criteria« and »standards ensure educational quality.« Further de-personalization is achieved by replacing »standards« with »standard-setting procedures,« as in the following quote from the 2010 Law:

> The *procedure* for designing and setting federal state educational standards is defined by the Government of the Russian Federation [in lieu of »federal state standards are defined«].

As a result, although thematically the government continues to be positioned as a regulating agent, syntactically it is hidden behind the standard-requirement hybrid. Through the technique of eliminating agency, educational standards are objectified and viewed as mechanisms for both guaranteeing and evaluating educational quality. Consequently, the constitutive role of government (setting standards and ensuring their nationwide implementation) is downplayed and its inspecting role (setting requirements and controlling the degree of compliance by educational

institutions) is highlighted, with official rhetoric shifting between quality assurance and quality control paradigms depending on the immediate context. On the one hand, standards are positioned as quality *assurance* mechanisms:

> Quality of education in organizations involved in educational activities is ensured through the implementation of federal state educational standards and federal state requirements […]. (Concept for National Standards 2005)

On the other hand, educational quality is also evaluated against the set standards:

> Federal state educational standards and federal state requirements […] are the basis for the objective assessment of educational quality […]. (Concept for National Standards 2005)

As a result, by virtue of controlling educational quality at the input and at the output stage, standards are effectively positioned at the center of the quality assurance paradigm, while educational institutions are assigned an executive role in the implementation of standards.

Educational institutions, in turn, are hidden behind the non-agency of »educational programs.« Educational programs consistently appear in the position of the subject/active agent rather than educational institutions (emphasis is mine):

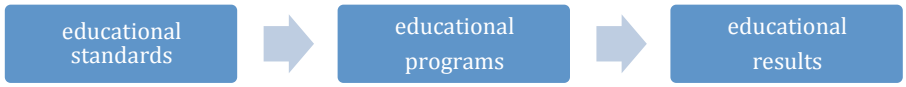
> Basic educational programs […] *are required to ensure* the attainment of learning results by students […], in accordance with federal state educational standards. (Concept for National Standards 2005)

The final link in the standard assurance paradigm—the student—is also effectively stripped of agency. In lieu of human agency, »student preparedness,« »the attainments of learning results,« and »educational results« are found in active constructions (emphasis is mine):

> State (final) attestation is a form of assessing the relevance of the level and quality of *student preparedness* against the requirements of

> the federal state educational standard for learning results […]. (Concept for National Standards 2005)

Thus, in allocating active positions to *processes* and *results*, the official standard assurance paradigm consistently masks institutional and human agents behind passive syntactical constructions. The emerging standard assurance paradigm appears to be completely without agents:



A common feature of a technocratic discourse (Lemke 1995, 63), lack of agency serves to obfuscate social actors and their responsibilities. As a measure of all things, educational standards are positioned at the hub of the standard assurance paradigm, with the government and the state virtually removed from the paradigm as quality assuring agents. At the same time, ambiguous policy language, marked by emissions, lexical inconsistencies, and conceptual substitutions of »educational standards« and »government-set requirements,« serves to implicitly reinstate the controlling role of government in educational matters.

Thus far, in tracing sources of public confusion over the definition of educational standards, I have established that the dialogue between the top and the bottom was hampered by the conceptual opacity of the official narrative and by hidden differences in the basic interpretation of the term. Having clarified lexical discrepancies, I now probe deeper into the conceptual dimension of the debate and demonstrate that various interpretations of the term *standard(s)*, coupled with different value judgments, stem from broader culture-specific interpretative frames. I argue that struggles between larger ideological frames of reference underlie lexical confusion and mixed government rhetoric within the reform debate.

The double standard of state control

In the public discourse, the notion of standards is interpreted in two distinct ideological manners, as the state's *obligation* and as state *requirements*. In the first interpretation, educational standards define the obligation of the state to provide quality education free-of-charge to all citizens. This concept draws from Soviet-era welfare state paradigms, in which the state serves as the principal agent of quality assurance.[7] Education in this view is a public good and it is exclusively the responsibility of the state to distribute it fairly, uniformly, and free-of-charge. This interpretative frame references the state's »duty« (*dolg*), »obligation« (*obiazannost'*), and »moral responsibility« (*moralnaia otvetstvennost'*), as in the example below:

> I consider the educational standard a *duty* (*objazannost'*) of the government to provide quality education nationwide. This is the only function the standard should have. That said, our government, that is, the high ranking bureaucrats in power, will try to cheat their way out, as they always do. We need to keep a vigilant eye on the government so that it doesn't wriggle its way out of its *responsibilities* (*otvetstvennost'*) and we need to cut short its attempts to free itself of the responsibility it is absolutely obliged to fulfil. (A teacher, *Teachers' Gazette,* May 2007)

7 Outside of the educational domain, the word »standard« carries a number of culture-specific connotations in the Russian language. Associated with strict Soviet-era quality control of goods and services, it has long-standing positive connotations. Such collocations as »national standard« (*gosudarstvennii standart*) and »quality standard« (*standart kachestva*) continue to be used on product labels and exploited in marketing campaigns in contemporary Russia to denote excellence. Examples are the ongoing TV talent show Quality Standard (*Standart Kachestva*) and the internationally renowned vodka, Russian Standard (*Russkii Standart*). At the same time, similar to its use in the English language (Alexander 2008), »standardization« (*standartizatsiia*) and »standardized« (*standartizovannii*) carry predominantly negative connotations of de-personalisation and averaging-out.

»Standardization,« in turn, is interpreted as nationwide provision of education of the *highest* quality, with »standard« (adjective, *standartnii*) signifying both »unified« and »of utmost quality«:

> Russia needs a unified educational standard compatible with the requirements of higher educational institutions, unified textbooks, and unified programs. In Soviet days, people educated on this basis were considered the most educated people in the world. (A parent, *Teachers' Gazette,* May 2007)

The »state obligation« frame of reference is marked by the idealization of the Soviet past and nostalgia for Soviet education as »the best education in the world.« While the overall interpretative frame is largely positive, it is often overshadowed by an appeal for vigilance over the actions of the government.

By far more predominant, however, is the negative interpretative frame of the standard as a mechanism of exercising state control over education. Here, the educational standard is interpreted as an *accountability requirement* put in place by the state to regulate educational institutions. In this framework, the new academic standard is referred to with terms such as »corrals,« »boxed-in,« »muzzles on academic freedom,« and »bureaucratic games.« It is seen as an unnecessary burden on teachers and a hindrance to the development of educational institutions:

> Generally speaking, there is no need for an »educational standard.« It is only needed for the bureaucrat. The job of the bureaucrat is to determine whether I am »standard« or not. To be included into the list of the »standard« you are expected to bribe the law-maker. While in real life, the standard is absolutely useless. Rural schools don't meet a lot of standards, but they are still doing fine. Standard, in the end, is just a box into which the bureaucrat wants to squeeze the whole shebang. (A teacher, *Teachers' Gazette*, August 2006)
>
> And who is going to live and work according to these standards—some incognito »professionals«? Aren't they no more than usurp-

> ers who have appropriated a right to dictate [the rules] in areas where they are not more competent than others? (A commentator, *Teachers' Gazette,* October 2007)

Perceived as the invention of an anonymous bureaucrat, the concept of an educational standard is believed to have been utilized and legitimized by the state as a means of monopolizing the educational sector and exerting centralized control at the expense of educational quality. Standardization reform is further interpreted within this frame as equalizing educational opportunities and unifying educational content on the basis of the *lowest* acceptable quality. Such interpretations are underlined by a persistent metaphor of a prison or a livestock corral where the masterminds of the reform are portrayed as »prison guards,« »usurpers« or »herdsmen«:

> Our efforts to oppose standardization reform are as ridiculous as asking a prison guard for relaxation of a confinement regime. The objective of the government is to dictate how to live our lives, what to teach our children, and so on. Merely by protesting against this particular document [the 2010 law on education] we, in principle, admit the right of the government to order us around. Therefore, if we are to protest, we should be protesting not so much against this particular law on educational standards but against the right of the state to standardize our lives. (pedsovet.org, accessed October 10, 2012)

In opposing the standardization reform, the public narrative commonly evokes negative associations with business and mass production:

> Standardization allows for cheap mass production and the standard makes it possible to stick a Taiwanese-made notebook into a domestically produced electric socket. (An observer, ege.ru)

Conceptualized in terms of a manufacturing standard, standardization reform is seen as incompatible with the domain of Russian education. It is appraised in extremely negative and judgment-laden Russian terms: *uravnilovka* (averaging out, depersonalization), *vseh pod odnu grebenku* (one

size fits all, literally: to groom everyone with the same comb), *shtampovka* (assembly line or »cut and dry« production), *protsentomaniia* (manic race for percentage rates). »Standard« (adjective) is synonymized with »routine,« »stereotypical,« »mass-produced,« »impersonalized,« and »mediocre.« Standardized curriculum and testing are said to lead to »robotization of the student,« and »dumbing of the nation.« This frame of reference often evokes public suspicions of government conspiracy. It is feared that the hidden agenda of standardization reform is to raise »brainless robots,« the uniform product of an »educational McDonald's,« programmed to perform a limited set of industry-driven tasks.

While broadly corresponding with the idea of a »standard-requirement« advanced by official discourse, public perception is dramatically different from the official view as regards value orientations. While the official discourse promotes the newly introduced educational standard as a panacea to systemic issues of quality and equity, the public discourse portrays it as the *cause* of inequality and of the quality crisis. In popular perception, the new educational standard has triggered systemic setbacks detrimental to both educational institutions and individuals. Thus, by »obeying« and »succumbing to« the new standards, schools have »lagged behind« or »have fallen behind global progress«:

> In Europe and the US, educational institutions are in a healthy competition with each other, while in Russia schools and universities, both private and public, are forced to obey standards sanctioned by the bureaucrats. I believe this is what's behind recent setbacks in terms of quality, equity, and technology. (A teacher, pedsovet.org)

Along the same line of reasoning, standardization reform is believed to have hampered the personal and professional development of individual students by imposing a one-size-fits-all approach to the learning process:

> Having passed the standardized national test and fit into a certain »standard,« the student is left with a limited scope of educational opportunities. (A parent's comment, ege.ru)

In terms of evaluative framing, standard in the meaning of »state obligation towards« becomes, in the public narrative, an antonym for the meaning »state requirement for,« with the latter signifying a straightjacket for academic and civic freedoms. This interpretation serves as the backbone for the discourse of resistance to reform.

The conceptual conflict between these two reference frames is commonly actualized through the lexical clash of the borrowed term »standard« (*standart)* and the domestic »program« (*programma*), denoting traditional comprehensive curriculum. Contrary to the official framing, the idea of *standart* in the public mind does not complement but principally opposes the concept of *programma.* Public arguments by opponents of standardization reform are typically construed as follows:

> We never had »standards,« we've had *programma* since the dawn of time. Now they've come up with all these bureaucratic games: the Anglophonic »standard« is now pronounced of higher rank than the Greek *programma*. But the new term does not carry any of the essence that was imbedded in the program. It makes it impossible for the teacher to work. (A teacher, *Teachers' Gazette,* April 2007)

As illustrated by the quote above, the »Anglophonic« *standart* is perceived as new and foreign, while the old, domestic (»from the dawn of time«) *programma* is seen as organic and authentic. Conceptually, the indigenous *programma* is moored within the positive »state obligation« frame, where it is associated with comprehensiveness, fundamentality, and provision of a high-quality education. The Anglophile *standart*, however, evokes the »state control« frame, where the term is associated with poor quality, superficiality, and excessive bureaucracy (»does not carry the [same] meaning,« »is merely a bureaucratic game,« »makes it impossible for the teacher to work«).

This heteroglossic opposition is not limited to public discourse, but is sustained in official discourse as well.[8] In both public and official dis-

8 A common rhetorical strategy of official discourse is establishing a desired frame of reference by negating an undesirable one. Consider the

courses, the »new« standard is construed as stemming from the progressive Western educational model and in opposition with the »old« one. However, the value orientations are reversed. The official narrative construes the »new« standard as a guarantor of high quality and academic freedom and the »old and outdated« *programma* as a bureaucratic hindrance to educational development:

> We insist that the standard does not serve as a »muzzle« on academic freedoms. On the contrary, it should provide opportunities for the realization of these freedoms. (Andrei Fursenko, Minister of Education, transcripts 2007)

> Not everyone understands that the state educational standard is not the same as the school curriculum [*programma*] the domestic system is accustomed to. Curriculum covers everything that can possibly be taught; standards, however, cover the minimum that must be taught and that the school graduate is required to master. The idea of state educational standards was borrowed by the designers of the first Law on Education (1992), drawing from the experience of industrialized countries with de-centralized systems of education and [does] not [originate] from Russian history. Consequently, transitioning from unified curricula to standards does not mean limiting [as popular opinion presumes] but expanding academic freedoms. (Alexandr Shadrikov, Duma Deputy, transcripts 2002)

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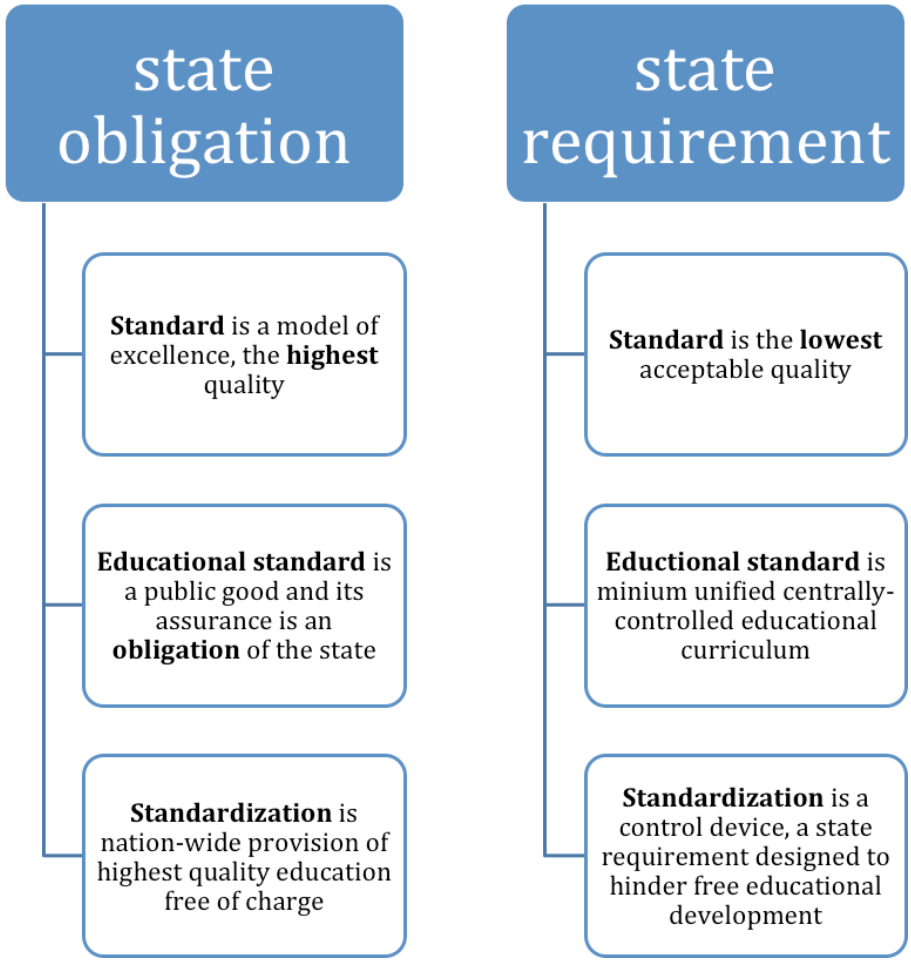
following example from a state-issued monograph (Ministry of Education 2005, 123): »Popular opinion holds that ›standard‹ means ›grey,‹ ›stereotypical,‹ ›undistinguished.‹ Some people think that educational standards are only needed for bureaucratic managers to facilitate control [over education], while for teachers, standards are no more than an obstacle to creative work. That is, of course, not true.« However, by appealing to popular sentiment in an attempt to neutralize resistance, the official narrative simultaneously reinforces popular interpretative frames.


state obligation
Standard is a model of excellence, the highest quality
Educational standard is a public good and its assurance is an obligation of the state
Standardization is nation-wide provision of highest quality education free of charge
state requirement
Standard is the lowest acceptable quality
Eductional standard is minium unified centrally-controlled educational curriculum
Standardization is a control device, a state requirement designed to hinder free educational development

Pedagogical standard: standard or non-standard?

Defined as a revolutionary breakthrough based on domestic traditions of developmental psychology, the new concept of educational standards emphasized individuality, creative independent thinking, and competency building:

> The new standard is a training scheme within the framework of education for people capable, in various degrees, of independent creative work and creative activity. This principle was the point of departure for the designers. Innovative society requires an innovative person. Unfortunately, the previous system of education did not have this particular objective. Instead, it had the objective of mastering knowledge, skills, and competencies. Is this a good thing? It may be so indeed. But the innovation society needs a different kind of person. The new educational standard for general education is a scientifically-based call for the formation of competencies that are, to a greater or lesser degree, characteristic of a creative personality. The scientific school that lies at the basis of this standard is the school of Vygotsky and Leontyev and their followers Elkonin and Davydov. This is the school of thought that treats the idea of personal development as the cornerstone [of education]. Perhaps for the first time, the educational standard is based on fundamental science […]. (Vitalii Rubtsov, director of the Psychology Institute of the Russian Academy of Sciences, cited in standart.edu.ru)

Aside from references to renowned Russian pedagogues, here and throughout the official discourse, the relationship between the idea of educational standards and indigenous pedagogical traditions remains undefined. Instead, the official discourse builds its rhetorical force on the divide between the progressive new and the Soviet old. In the quote above, this is achieved through invocation of the knowledge-skills-competencies triad (*znaniia-umeniia-navyki*), an emblematic marker of Soviet pedagogy. The triad serves to evoke the »state machinery« frame within which the uniformity of educational instruction is seen as a

depersonalized mechanism for mass-producing »cogs« in a planned economy. The Soviet model is contrasted with the Vygotskian approach, presented as newly re-discovered and organically harmonious with the idea of the educational standard. The reference to this prominent Russian education theorist is employed to signal the rootedness of the reform in domestic pedagogy, with its emphasis on *vospitanie*[9] and the development of the learner's creative potential. Overall, however, beneath claims of novelty and originality, the official narrative operates in a pedagogical vacuum.

Outside of the official discourse, the value poles are completely reversed. In pedagogical terms, the adjectival use of standard (*standartnii*) is associated with the cliché, the impersonalized, and the foreign one-size-fits-all approach, while non-standard (*nestandartnii*) stands for the original, individual, and creative. In a 2010 article in *The Teachers Gazette*, the renowned Moscow intellectual Ludmila Malenkova discusses this concept:

> I have been dealing with moral education [*vospitanije*] all my life and I can not remain unemotional about the idea of *vospitanije* expressed in terms of »educational standards.« A lot of new words are coming into use these days: »technology,« »monitoring,« »service,« and »standard.« It's impossible to remain unemotional about

9 *Vospitanie* is a uniquely Russian concept (Halstead 2006; Muckle 2003). Variously translated as »moral upbringing,« »personality development« or »character education,« it deals with the development of Russian values and attitudes in the process of academic learning. Halstead (2006, 424), for example, defines it as »a systematic attempt to mould the attitudes and comprehensive world view of children and to inculcate in them certain predetermined values and behaviour patterns […].« Long (1984, 470) defines the goals of *vospitanie* as raising »honest, truthful human beings who are helpful to others and who must work hard in school to develop intellectual, aesthetic, and physical abilities—that is, to develop a comprehensive, harmonious personality.« What makes *vospitanie* a distinctly Russian concept is the organic fusion of elements that in other cultures are considered to be independent or even conflicting: factual knowledge, skill formation, personal morality, patriotism, and civic ethics (Alexander 2000).

> all these changes. Vladimir Levi[10] once wrote that there are no standard (*standartnii*) children. Vladimir Monomach was fascinated by the great variety of people's faces, and especially by the fact that each face is unique. In one of his letters to me, Dmitry Likhachev[11] wrote: »Paradoxically, dissimilarity draws together, whilst similarity, sameness, and standard-ness leave us indifferent. It's possible to fall in love with an unpretty face but it's impossible to fall in love with a standard, mass-produced face.« What we are doing here [by introducing standards into the system of education] is trying to come up with a method of die-casting or stamping (*shtampovka*). How pedagogical is that? (*Teachers' Gazette*, September 2010)

In discussing the idea of educational standard, Malenkova invokes the notions of »technology,« »monitoring«[12], and »service« in a line of association that links *standart* to market economy production. These are dismissed by the author as contrary to the humanistic pedagogical paradigm of *vospitanie*. The latter is evoked with a reference to influential Russian thinkers Vladimir Levi and Dmitrii Likhachev, whose views on education are rooted in ideas of personal development through learners' natural curiosity and creative potential. The backbone of those ideas is the notion of »non-standard-ness« (*nestandartnost'*), understood as »one-ness« in the sense of the individual uniqueness of each human being. The »non-standard« (adj.) within this paradigm is interpreted as »one« or »one-of-a-kind,« while »non-standard-ness« is »one-ness,« or »equality within individuality.« These are opposed to the ideas of »same-ness,« »same as everyone« and »equally depersonalized«—all epitomized by the notion of »standard.«[13] In contrasting the idea of »non-standard-

10 A renowned Russian writer and psychologist.

11 A distinguished Soviet scholar, known as the »guardian of national culture.«

12 *Monitoring* here is a term transliterated from English, a synonym for the Russian *nabliudenie*.

13 The broader opposition of »same-ness« versus »one-ness« has a long-standing philosophical tradition in various modern cultures. It was de-

ness«/»one-ness« with those of »standard-ness«/»same-ness,« Malenkova interprets the latter within a pedagogical paradigm centered around knowledge, rationality, and outcome, in which the sole purpose of education is to transmit the ready-made socio-cultural heritage of adults to the younger generation. The metaphors of »die-casting« and »stamping« generate an image of the child as a *tabula rasa* onto which readily available sets of beliefs and morals are imprinted by the educator. These metaphors are strongly reminiscent of long-standing domestic concerns over pedagogical and moral violence. These were most vocally expressed by Leo Tolstoy (1989), who called the knowledge-centered paradigm a form of »moral despotism,« arguing that no learning can be achieved by putting the educator in a superior position and imposing a »standard« procedure on the process of education. When teaching is merely knowledge transmission and the educator is merely a manager, claimed Tolstoy, the outcome of the educational process is akin to die-casting *(shtampovka)* or »a tendency of one man to make another just like himself« (1989). Instead, Tolstoy promulgated and popularized humanistic education based on the cultivation of a creative and artistic personality through active, conscious, and guided exposure to domestic culture by the humanist pedagogue.

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scribed by the social philosopher Erich Fromm (Fromm 2000, 20–21) as follows: »In contemporary capitalistic society the meaning of equality has been transferred. By equality one refers to the equality of automatons; of men who have lost their individuality. Equality today means ›sameness‹ rather that ›oneness.‹ It is the sameness of abstractions, of the men who work in the same jobs, who have the same amusements, who read the same newspapers, who have the same feelings and the same ideas. Contemporary society preaches this idea of individualised equality, because it needs human atoms, each one the same, to make them function in a mass aggregation, smoothly, without friction: all obeying the same commands, yet everybody being convinced that he is following his own desires. […] Just as modern mass production requires the standardisation of commodities, so the social process requires the standardisation of man, and this standardisation is called ›equality.‹«

This overarching philosophical contest between standard and non-standard is reflected at the level of contemporary public discourse on education, albeit with a lesser degree of conceptual intricacy. Consider, for example, the following discussion of standardized testing by a parent of an undergraduate student (emphasis is mine):

> Personally, I think we put too much emphasis on standards. Our higher education produces graduates with *standard* thinking who are only able to repeat what they've learned by *rote learning*. In that case, why would we want to have imperfect »*standard*« humans, wouldn't it be better to simply *replace them with robots with artificial intelligence*? You would think robots would be more efficient. What we really need to think about is not how to test children but how to *develop the gift of creativity in them*. This will allow them to become professionals with new, *non-standard thinking*. (ege.ru, accessed October 10, 2012)

This interpretation of »non-standard« is based on the idea of cooperative problem-solving through creative (non-standard) tasks (*nestandartnie zadachi*), resulting in independent (non-standard) thinking (*nestandartnoie myshlenie*). The standard, in turn, is unequivocally associated with rote learning, »robotization,« and mechanicalness.

In both public and policy-making domains, the notion of educational standardization is reciprocally linked to concepts of pedagogy and culture,[14] with the humanistic pedagogical model of education and *vospitanie* as the *foundation of culture*. In discussing the cultural suitability of the standardization reform, one Duma deputy states (emphasis is mine):

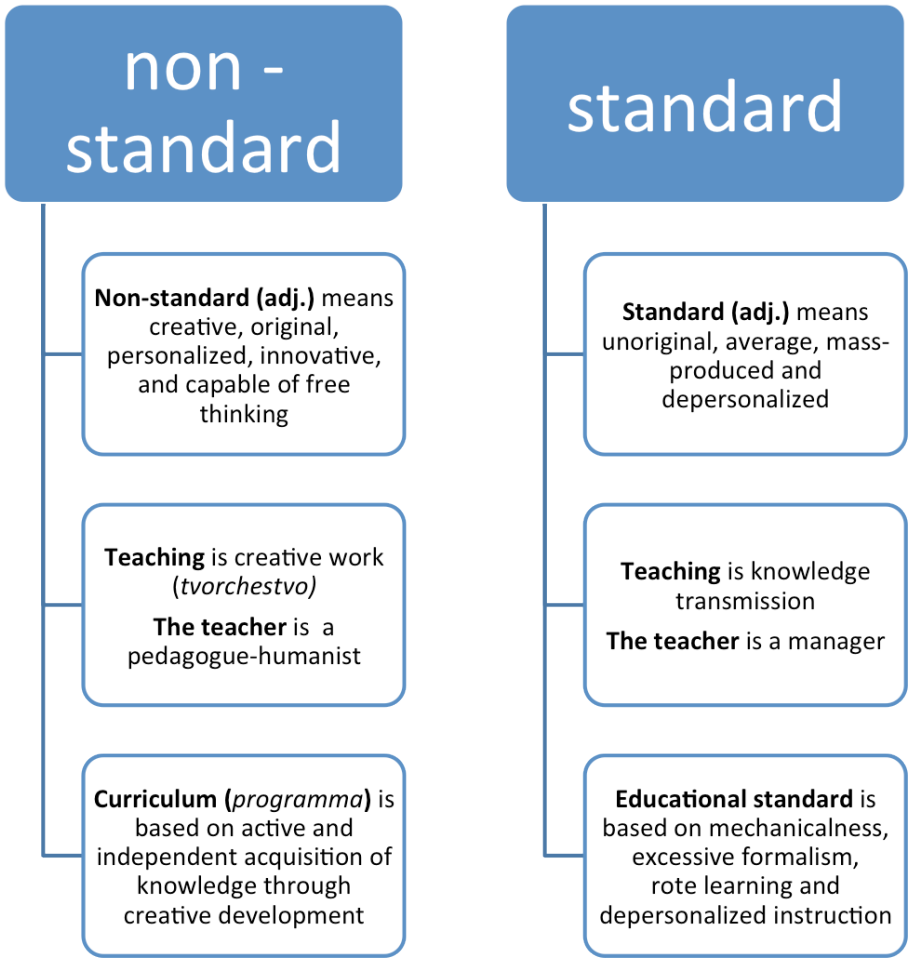
14 The close relationship between education and culture in Russia has a *legislative* foundation: the constitution of the Russian Federation stipulates that as a social welfare state, the state is obliged to provide conditions for the free development of a human being, including such aspects as cultural and spiritual development as well as freedom of self-expression through creative work and participation in cultural life.

> What are we essentially actually talking about here? We must preserve a certain educational core in school, a core of knowledge and skills that allows us to *preserve our culture, develop our culture, think independently, be able to think and to learn, as well as be willing to learn.* That's all it [the educational standard] is. (transcripts 2002)

Along the same line of argument, a school teacher contends:

> What exactly do the designers of the standardization reform expect of the Russian system of education? Standards are supposed to correlate with the *value system* which comes down to *one of two* options: nurture (*vospitat'*) a personality *or* breed one for the needs of the innovation economy. (ege.ru, accessed October 10, 2012)

Thus, in its appeal to domestic pedagogical and cultural values, public discourse sees the idea of a »standard« as *a priori* incommensurate with the local value system in *any* of its various lexico-semantic variants, whether it is a new tool for managing educational provision, a state requirement for educational institutions or a novel pedagogical approach. In the words of one teacher participant of a pedagogical forum, »the mistake of the government as regards modernization reform lies in the fact that it is trying to formalize that which is principally non-formalizable in the public mind.« (standard.edu.ru)



Clashing interpretative frames and failed consensus

In addition to fuelling public resistance to reform, the clash of the opposing ideological frameworks identified above hampers the policy-making debate, even creating a polarizing effect among the proponents of standardization reform themselves. A debate during a plenary session of the State Duma involving two pro-reform policymakers illustrates this polarization:

> Vladimir Shadrikov, one of the masterminds of the third-generation educational standards: As we know, »standard« is translated from English as »model,« or »master copy« that serves as an initial model for comparing similar objects. This is extremely important to remember. Some people tend to interpret »standard« as a template (*shablon*) or, a certain—so to speak—dogma. We based the idea of [educational] standards on a model to compare programs, textbooks, and other study materials. Therefore, standards are meant to provide unity of educational space through a comparison of suggested programs and textbooks, as well as other study materials.
>
> Gennadii Yagodin, Duma Deputy: »Standard« is a bad word. Vladimir Dmitrievich here has tried to convince us that in English this word means something other than what it means in Russian. But the thing is, we live in Russia. We do NOT [emphasis in the original] want a standard student, or a standard pupil, or a standard teacher, or a standard engineer. The very word »standard« is very off-putting. (transcripts 2010)

In interpreting the concept of educational standards, Deputy Shadrikov draws on the interpretative schema presented in the official discourse of the reform, in which standard is positively framed as a useful tool of educational management. In his emotional response Deputy Yagodin draws on the popular interpretation of the same term, in which standard is perceived as incommensurate with domestic pedagogy. In discourse analytic terms, the two discourse formations share terminology, yet are not talking about the same thing (Lemke 1995, 38). As a result, the policy-making debate often finds itself deadlocked over wording and basic definitions. While public discourse is relatively homogenous in its oppositional orientation as well as in its argumentative structure, the policy-making discourse simultaneously carries conflicting—official and popular—frames. Straddling the boundaries between opposing interpretations, the official narrative is highly self-contradictory. Consider, for example, the following government statement (emphasis mine):

> Do we need educational standards? Undoubtedly, we do. And not just in the system of higher education but in schools as well. Generally speaking, *standards force educational institutions to work in strict regimes* [**state requirement frame**]. Which *contradicts the very spirit of a university*, as universities have always been known for their *free thinking:* top-notch science is taught there, *non-standard approaches and opinions have always been welcome* [**creative pedagogy frame**]. *Restricting educational process by rigid regulations won't allow for proper, quality, teaching of the subjects* […] [**state requirement and state obligation frames**]. This will *work to the detriment of high educational quality* [**state obligation frame**]. Standards are needed, first of all*, for the purpose of accreditation and carrying out checks on the functioning of educational institutions* [**state requirement frame**]. The standard sets the *minimum* that educational institutions *are required* to provide [**state requirement frame].** (council.gov.ru, accessed October 10, 2012)

This narrative represents the whole range of interpretative frames embedded into the term *standards*. The »state obligation« frame here clashes with the »state requirement« frame and both come into conflict with the creative, »non-standard pedagogy« frame. While nominally proclaiming humanistic values, the official discourse legislatively reinforces the paradigm of authoritarian state control. The domestic pedagogical tradition, based on the idea of »non-standard-ness,« undermines the rhetoric of both. Figuratively speaking, while attempting to reconcile conflicting frames, the official rhetoric is bursting at the seams.

Discussion of findings: So why doesn't the telephone ring?

The analysis presented here has exposed several points of tension surrounding the concept of *educational standards* at the linguistic, metaphorical, and conceptual levels. I have demonstrated that synchronous use of the term *standard* is characterized by a vertical diffusion of meaning. While remaining within the field of educational content, it undergoes semantic narrowing as it trickles down from the formal into less formal domains of the reform debate. Whereas official discourse positions

educational standards as a broader principle of educational provision, public discourse interprets it as merely a minimum public school curriculum. Having explicated lexical ambiguities, I deconstructed conceptual frameworks within which particular meanings of *standard* are instantiated. I have shown how the term *standard* is evaluated as »good« or »bad,« »suitable« or »unfortunate,« etc., depending on the conceptual frame evoked. I identified the two overarching conflicting interpretative frames: »state obligation« versus »state requirement.« One frame is associated with authoritarian pedagogy, the state monopoly over education, uniformity of educational inputs, and standardized »assembly line« production, while the other is rooted in the welfare-state model of free and universal provision of high-quality education based on the domestic pedagogical tradition of *vospitanie* and experimental, learner-centered, humanistic, individually-tailored educational designs. I also uncovered a number of tensions in the interpretation of the idea of standards within the pedagogical domain, including the oppositions »curriculum versus *programma*« and »standard versus non-standard.« Within these oppositions, one member stands for the »humane,« »fundamental,« »individually unique,« »creative,« »qualitative,« and »liberating« side, while the other represents qualities such as »superficial,« »restricting,« »stereotypical,« »mediocre,« »mechanistic,« »mass-produced,« and »lacking individuality.« While they share these initial points of reference, the values in the public and the official discourses are reversed. Official discourse construes the progressive idea of educational standards in opposition to the »grey uniformity« of Soviet-era schooling, while public discourse castigates the standardization reform as a one-size-fits-all solution. Their seemingly shared language conceals significantly different interpretative schemes underlying official and public visions of the reform. Straddling contradicting frames of reference, the official discourse exhibits a considerable degree of inconsistency in its representation of educational standards. Through a de-personalization of agents within the framework for ensuring standards, the official narrative diffuses responsibility for the implementation of educational standards and asserts the state's controlling and inspecting role as regards educational provision. Despite

repeated government attempts to reconcile the interpretative frames within a single narrative, self-contradictory official rhetoric appears to bounce off domestic pedagogical frames.

The findings presented in this article suggest two broader implications for the perceived stagnation and failure of education reform in Russian. First, reflecting broader issues of institutional anomie and crisis of identity, official government discourse appears to have failed to serve its mediating function as regards policy interpretation and cultural translation of new educational values. From a sociological point of view, moral cognitive restructuring within society is an extremely complex and slow-moving process that takes place largely independent of global policy interventions prescribed by foreign actors (McDaniel 1996; Kliucharev and Muckle 2005; Shalin 2012). As a politically imposed discourse, neoliberalism in Russia requires a substantial degree of alignment with cultural norms and patterns of thought. Embodying both imperatives of the neoliberal market and contingencies of the socialist past, educational standardization reform in Russia has clearly prompted a major renegotiation of educational values within Russian society. Instead of negotiating apparent ideological tensions between models of the neoliberal and the welfare state, the highly technocratic official discourse struggles to retain a semblance of ideological unity through mechanical juxtaposition of conflicting values and substitution of traditional educational values for radical neoliberal values. The meanings of key reform concepts are refracted or flipped depending on the policy context and competing discourses are »stitched together« (Taylor 1997, 9) in a »manipulated consensus« (Silova 2002, 1). Keeping in mind the centrality of governmental agency in interpreting and modifying »borrowed« discursive meanings, the continuing effect of »neoliberal stagnation« (Magun 2010, 16) in Russia's education reform originates at the level of the conception of reform, prior to its implementation.

Second, official detachment from traditional cultural configurations generated a legitimate protest against the radical reversal of traditional values in particular, and the excesses of modernity in general. The neoliberal ethics of standardization continues to fuel public resistance

and official and public conceptualizations are dramatically opposed. Stalled by the intractability of conceptual categories, the reform discourse has been characterized by an extreme polarization of opinions with little room for middle ground between pro-reformers and the »old guard« (Holmes, Read, and Voskresenskaya 1995; Kiselev 2003). In the case of standardization reform, the neoliberal notion of standardization as a set of educational principles ensuring fair educational opportunities has been re-conceptualized in the Russian culture code as a reductionist one-size-fits-all prescription that straightjackets the local pedagogical tradition. What has been presented by the government as a progressive tool for maximizing human personality through competition, curricular choice, and standardized assessment was interpreted in the public mind as a complete displacement of personality. The notions of diversity and uniqueness through quality standards have been perceived in terms of sameness and averageness. The concept of quality assurance through nationwide educational standards has been conceived in terms of total authoritarian state control.

A lack of shared vision as well as ambiguity and confusion among reform agents are often indicative of a symbolic contest over broader social meanings in the process of re-negotiating educational values (Ball 1994; Fullan 1993; Hargreaves and Fullan 2009). In other words, the masterminds and the grassroots agents of reform are not talking about the same thing, hindering interaction between different reform agents and hampering the reform process. From this perspective, this study speaks to broader, culturally-sensitive, contemporary sociological research on Russian modernization (Iliin at al. 1996; Kon 1996; Khrushcheva 2000; McDaniel 1996; Dinello 1998; Wyman 2007) that highlights an unbridgeable ideological divide between neoliberal and traditional Russian worldviews; in the process of education reform »reformers are standing *against* [cultural] reality rather than building on it« (Iliin et al. 1996, 319).

The culture factor: broader theoretical implications

The study presented here highlights the cultural variable as a crucial factor in a process of social reform. While the acts of foreign advisors, legislators, and top national policy-makers are central to formulating educational policy meanings, the interpretations of the official or legislative language are made by grassroots-level agents; including teachers, parents, students and educational managers. Based on a decontextualized neoliberal blueprint, global travelling policies undergo processes of cultural policy *interpretation* by grassroots stakeholders, producing local conceptualizations that may be radically different from the intended ones. Within the national educational discourse, context-specific interpretations made by these stakeholders feed back into policy formulation and vice versa. This study illustrates how policy reality is made up not only of »authored« texts with clear-cut meanings intended by policy-makers, but also of »constructed« texts, i.e. »possible variants and even incommensurable meanings made by grassroots educational players« (Yanow 2000, 9). The study feeds into emerging international social policy research that has been increasingly recognizing policy reality as being primarily a socially interpreted process (Yanow 2000; Ball 1994; Trowler 2003; Fullan 2009; Hargreaves and Shirley 2009). Using standardization reform in Russia as one case study, this article suggests that that persistent intractability of key educational issues may be rooted in conflicts over symbolic meanings made by interpretative communities in a particular policy space and thus calling for further conceptualization of the cultural dimensions of educational change.

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Social science teachers on citizenship education

A comparative study of three European countries

Margarita Jeliazkova

In this paper, I examine the way teachers in three different European countries present their views on citizenship education. The three countries occupy distinct places on the political map of Europe: the Netherlands is an »established« Western democracy and a founding member of the European Union; Bulgaria is a post-communist country that recently joined the European Union, and Croatia, the newest member of the Union, is a country that emerged after the war in former Yugoslavia. Although the choice of countries was partially pragmatic, it proved to be a fruitful source of insights and raised questions that can be explored in other European countries as well. I demonstrate that there is not one »national« definition of citizenship education. Rather, in each country, different conceptions co-exist, with some themes shared across national borders and others more clearly defined by the country's history and current political and educational climate

The paper is organized as follows: first, a brief explanation of the methodological choice for a Q study based on Douglas and Wildavsky's grid-group theory. Second, a brief presentation of the most important findings in the three different countries, and third, a discussion of some of the more striking insights gained from the comparison of the three countries.

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The political force-field of teaching citizenship by social studies teachers

In the last two decades, citizenship education has been high on the agenda of almost all European countries; »old« and »new« democracies alike. With more than 300 definitions of citizenship (Jones and Caventa 2002; Heater 2004), the term is intrinsically political. Furthermore, the very term *citizenship education* indicates the intricate relationship between politics and education. Education is in itself always political. The temptation to shape people in a certain ideological direction, to try to instill in them particular political attitudes and preferences for specific political ideas, and ultimately to influence their behavior, is not new, and takes many shapes in different societies.

In one form or another, citizenship education is present in all school curricula in Europe. School is the institution which has been designated the task of teaching—and has the capacity to teach—about citizenship in a sustained, systematic way, reaching out to practically all youth. In recent years, there have been a number of studies concerning the effects of citizenship education on European youth (for an overview see Neubauer 2012). Often, these studies bypass the role of the teacher, as they seek a correlation between different types of curricula and various indicators of changed political attitudes in young people (Isac, Maslowski, van der Werf 2012; Schultz et al 2008; Torney-Punta et al. 2001). There have been fewer studies on teachers' views worldwide. (Anderson et al 1997; Patterson, Doppen, and Misco 2012) We can speculate that this is largely due to methodological difficulties: school cohorts are easier to construct and to include in large-scale quantitative comparative models. At least on the surface, they share many common traits across schools and across countries. Teachers in contrast, tend to have diverse backgrounds, they are more difficult to reach and even more difficult to organize in cohorts suitable for large-scale empirical studies.

Yet, teachers are key players in the process of citizenship education. Teachers are the ones who daily implement citizenship education, in the

context of implicit or explicit school policies and broader national objectives. Obviously they do this according to their own understanding and skill. Faced with the task of implementing a demanding and often deliberately broadly defined curriculum in citizenship education, social studies teachers have to find a *workable balance* of conflicting demands: how to teach a subject in accordance with their professional criteria and beliefs while fulfilling their obligation to contribute to citizenship education. Should they educate students mainly about their rights or about their obligations? How do they find a balance between learning about freedom and learning about taking responsibility for a local and also increasingly global community? Should teachers remain neutral or rather propagate their own political and ideological preferences? Are they obliged to remain loyal to state policies or, to the contrary, systematically criticize them? Should they shield children from political controversy or use it in the classroom? And finally, what kind of citizens do they wish to educate—»good« and well-adapted citizens or critical and caring citizens? These and other questions delineate the force-field in which social science teachers must navigate.

How can we explicate and classify the different types of viable solutions? In this study, I use *the concept of citizenship education* as the nexus of a number of important, but equally difficult to define, concepts – democracy, politics, neutrality, political education, the place of education in society, and the teacher as a professional. These are not completely independent from each other and do not form random *mix-and-match* combinations. Rather, they constitute *patterns of thinking and subsequent action,* which are based on core beliefs about politics, education, and the teaching profession.

Thus, the question asked in this study was: can we map this force-field of dimensions in order to shed light on the way citizenship is being taught at school? Is it possible to describe the distinct ways in which teachers think? Do they share a common ground? What are the topics that divide them?

I chose to explore these issues with secondary school social science teachers in the three countries mentioned above—Bulgaria, Croatia, and the Netherlands. The choice for a comparative perspective was partly pragmatic, as access to language is essential, particularly access to Slavonic languages, and partly dictated by the idea that inter-country comparisons can contribute to a deeper understanding of the questions stated above. Most comparative studies have been done at the institutional level—through European networks, or through national case descriptions (e.g. Hedtke and Zimenkova 2012; Agarin and Karolewski 2013). More research is needed that focuses on the conceptualization of citizenship education by teachers in different national contexts (Hahn 2010, 17).

In the following section, I explain how I attempted to meet the methodological challenges of investigating the highly subjective views, beliefs, and »theories-in-action« of a relatively diverse group of respondents by combining Q-methodology with grid-group cultural theory.

Research design: Q methodology study based on an application of grid-group theory

a) The choice for Q methodology

I chose to explore the views of social science teachers at secondary school level using face-to-face interviews as part of a Q methodology study. Q methodology is an approach suitable for the purpose of mapping highly diverse views to expose underlying similarities and key themes (McKeown and Thomas 1988). It combines qualitative data (face-to-face semi-structured interviews based on a specific manner of sorting statements) with quantitative data (factor analysis of ranked statements), thus allowing to work with small and diverse samples in exploratory settings (for a detailed explanation see Watts and Stenner 2012). Besides these technical considerations, there are other important features of Q methodology that made it particularly suitable for the purposes of this study.

Q methodology engages researchers in a dialogue with their respondents—in this case the teachers—at all stages of research. It lets teachers speak with their own voices without relinquishing academic rigor. Q methodology not only allows for a great deal of freedom in interpreting any question or statement, it puts the respondent's subjective opinion at the very heart of the research. The relationship between researcher and respondent thereby becomes one of peers exploring ideas. Respondents are engaged in ranking a set of statements while providing comments and interpretations of the views they are presented with. Comparison then becomes a dialogue between different respondents, brought together in a large exploratory community by the researcher. The subsequent factor analysis measures the positions of individual respondents towards each other, rather than the distance to some predefined set of indicators. The respondents are thus grouped together based on the views they share as opposed to expectations based on demographics or other variables.

Q methodology has one particular added merit for this study: it allows us to look at diversity regardless of national borders. As I shall demonstrate below, all three countries exhibited a great deal of diversity that cannot be reduced to one dominant national view. At the same time, the respondents in all three countries shared a substantial number of important views and perspectives, which might have been overlooked if the focus had been on inter-country comparison only. Q methodology makes the central themes, »the bones of a discourse« (Wolf, 2004), explicit by seeing national differences as variations on a general theme.

b) Construction of the statement sample: Choice for grid-group theory

A very important step in Q methodology is the construction of a sample of statements on the topic at hand. In this case, I selected statements on the topic of research. I chose to use grid-group theory as an organizing framework to delineate the boundaries of the force-field areas within which the diverse views could be positioned.

Using grid-group theory (Thompson, Ellis, and Wildavsky 1990), I delineated the dimensions within which these diverse views and beliefs fit. Grid-group theory offers several advantages: it can capture most of the variety in both current and historical debates, in this case on citizenship education; it illuminates central analytic issues across countries and across individual variances; and it allows the identification of views on citizenship education that gravitate towards one of the ideal types in the framework. Not a single one of these ideal types can be considered better, or more viable, or more up to date, without taking into consideration the particular political and national context in which it originated and was developed. (Hood 2008, 3–21)

Grid-group theory defines four core-value cultural types—conservative hierarchy, active and competitive individualism, egalitarian enclavism, and fatalism—that serve as the researcher's compass in structuring and ordering existing discourses (Hoppe 2007). Applied to teachers' views on citizenship education, a review of the literature and pilot interviews delivered the following ideal types (Jeliazkova 2009; Jeliazkova 2013):

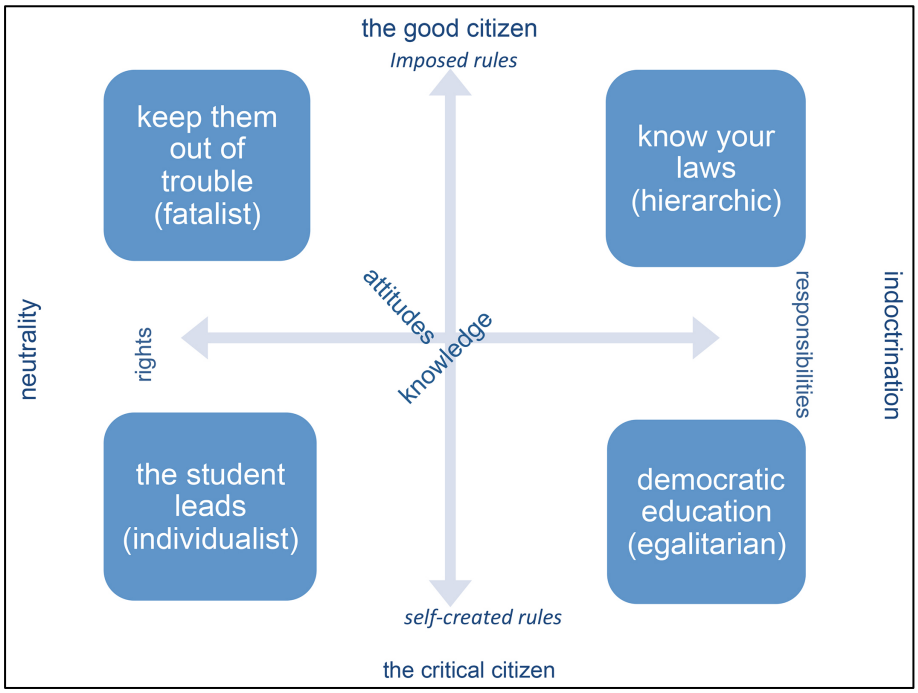

Fig. 1: Four ideal types of views

The individualist (liberal) ideal type is concerned with educating critical citizens, but aims mainly to promote the students' individual progress and gain. The egalitarian type is also critical, but aims at social equity. Both teachers operate as coaches. However, the individualist teacher puts knowledge of »the system« at the forefront, whereas the egalitarian one is more concerned with group values and morality. The individualist type and the fatalist type share the ideal of remaining politically neutral, as opposed to the hierarchic and egalitarian types, who are directly concerned with instilling and reinforcing particular values in their students. The hierarchic (conservative) type is concerned with the sustainability of the system and thus at educating »good« citizens. The fatalist type tends to see the »good« citizen as one who stays out of trouble. The fatalist type shares a preference for attitudes and skills with the egalitarian type, while the hierarchic type's focus is on knowledge about the social order and established institutions. Unlike the individualists, however, they are

concerned with assigning a proper place in society for the future citizens. While both the egalitarian and the hierarchic types encourage participation, the accent is on alternative forms of (direct) participation or using legitimate channels (elections, laws), respectively. These ideal types serve to map the discourse on citizenship education in relation to social studies.

Constructing a set of statements around ideal types in this way provides for the creation of a common space within which an exchange of ideas takes place. Based on this framework, 41 statements were selected from various literature sources and pilot interviews (Jeliazkova 2009; see appendix 1 for a list of statements). These 41 statements represent the spectrum of possible views and stand for the discourse on the topic, as explained above.

Every teacher finds his or her own particular position in this space. This position never overlaps completely with any officially stated objectives, nor does it match exactly with the ideal types outlined above. Every teacher finds his or her own workable balance of views, held together by—often implicit—core beliefs. This study maps and explores these individual views in order to find overarching central themes, as well as important distinctions and similarities between teachers in the three countries. Equally important, the study raises key questions that still need to be explored in scholarly discussion and further research.

The most important findings of the study follow.

Research results: Factor analysis and interpretation

Three sets of interviews were held for this study: 17 interviews with secondary school social studies teachers in Bulgaria (2011–2012), 17 interviews with secondary school social studies teachers in Croatia (2012),[1] and 28 interviews with secondary school social studies teachers

1 Many thanks to Anka K. Kostro, University of Zagreb, Croatia, who collected and transcribed the data and was involved in the preliminary analysis.

in the Netherlands (2013). The samples are not representative, as the method is explorative and does not claim representativeness of the outcomes. However, a balance was sought between diversity of backgrounds and demographics (male/female, experienced/novice, small/big town, type of school) on the one hand and pragmatic restrictions on the other.

In a face-to-face interview, respondents were invited to rank 41 statements in a fixed pattern, from »strongly agree« to »strongly disagree« (see appendix 2). During the interviews, respondents explicated their choices, thus shedding light on their patterns of thinking and on the priorities they set in their work as teachers. The respondents offered their own interpretation of the 41 statements, while remaining in the shared context of the discourse. The rankings were recorded for subsequent processing and factor analysis.

Three sets of data were analyzed, resulting in three sets of factorial groups—five for Bulgaria, four for Croatia and four for the Netherlands. These represent groups of respondents who think in similar ways. In addition, the whole set of data was factor analyzed, resulting in 5 factors. A short description of the factors follows.

a) Bulgaria: A strong sense of responsibility

The five factors found in the Bulgarian data set are presented in figure 2.

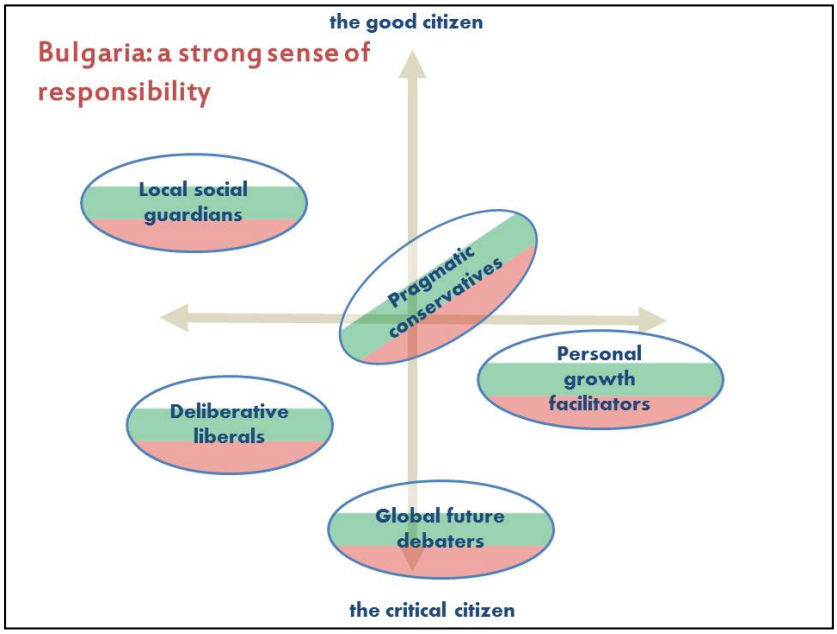

Fig. 2: Five factors in Bulgaria

Common themes

The teachers we spoke to were making a serious attempt to uphold their own professional standards in their daily work, to be truthful, and to demonstrate a clear position on matters they deemed important. The overall impression was that they remained critical, guarded their professional discretion, and assumed great responsibility for the education of Bulgarian youth—even when they felt that school as an institution, and even more so the state, are failing them. In fact, especially when institutions were failing them. This is why they did not feel constrained by state curriculum requirements. This almost allergic reaction to any state interference can be partially traced to old communist times.

All teachers agreed that citizenship education is about participation in a democratic debate and this is why they help students to develop their research and discussion skills. A strong link between citizenship and democracy was found in every interview, in spite of critical remarks about Bulgarian political reality. In the eyes of the teachers, the process of democratization, though far from completed, is irreversible. Teachers insisted on a solid, though not overburdened, knowledge base, which is not the same as just feeding children with facts.

The most distinguishing feature of Bulgarian teachers is their ambivalent attitude towards politics and politicians. Most respondents made a clear distinction between the practice of politics—what politicians do—which they considered in the main unsuitable, if not outright harmful, for students, and the *political nature* of social phenomenon. The latter is often not referred to as »politics.« The term *Политика* had negative connotations for teachers and students alike. Teachers sometimes went to great lengths to explain how they differentiate between active political propaganda (which is considered inappropriate) and allowing for an academic, but not necessarily academically detached, analysis of the most urgent problems of society. A positive role model of a Bulgarian politician suitable for school lessons is yet to be found, however.

Below is a short description of the five factors—five groups of teachers adhering to these five types of views.

Pragmatic Conservatives:[2] »We give them the rules of social behavior«

Pragmatic conservatives put a strong emphasis on knowledge, take a protective, mentoring position towards their students, and exhibit a great amount of trust towards the school as an institution. They see school as a model social institution, and therefore encourage participation in school activities as preparation for later. The teachers in this group do not wish to encourage students to participate in Bulgaria's current political life. They clearly do what they can to protect students from the hardships of everyday politics. Their attitude towards the everyday practice of politics in Bulgaria is rather negative.

For pragmatic conservatives, the greatest concern is discipline. In their eyes, students do not take their obligations seriously. Very often, respondents mentioned rights in conjunction with democracy, stating that »*democracy and freedom is not the same as doing whatever you want.*«[3]

Statements concerning the method, process, and critical analytic skills necessary to, acquiring knowledge about institutions, social structures, and politics in general, were rated positively. Respondents were concerned with neutrality and were careful not to promote any particular ideology. Teachers do not see their personal political engagement as linked to teaching citizenship. Rather, to display such political engagement is considered an act of irresponsibility, which may lead to anarchy.[4]

2 The labels are an attempt to capture the »character« of a factor. Terminological references to the group-grid field are not based on strictly quantitative measures, nor are they a measurement of pre-operationalized definitions of »liberalism« or »conservatism« or any of the other dimensions. The nature of analysis in Q methodology does not permit for this kind of labeling. Further large-scale quantitative studies based on these results may lead to more strictly measurable differences along a number of dimensions.

3 Quotes from interviews throughout the text are in italics.

4 Sadly, the recent events in Bulgaria—continuous protests in which various layers of citizens engage in political struggle without calling it political—illustrate the potential effects of these widespread ideas. In Bulgaria, teachers as a part of society tend to see schools as »apolitical« institu-

This is why they are careful about discussions of controversial issues, in order not to »politicize« issues too much.

In sum, these teachers see themselves as contributing to the education of a citizen who would find a place in the fabric of society, who would obey the law out of conviction and as a result of thoughtful deliberation, and who would be mature enough to ensure social stability on the one hand and the safeguarding of personal rights and freedoms on the other. This group is thus situated mainly in the hierarchical quadrant, with a slight overlap with individualism. In Bulgaria, the distrust of power is too great to allow for a genuinely hierarchic position.

Deliberative liberals: »We are here to provoke them into freedom«

The name of this group refers to their two most important vantage points—an individualistic/liberal orientation and a focus on democratic deliberation. Deliberative liberals' main concern is the method of thinking and inquiry, the need to make one's own decision. They steer away from everything that looks like indoctrination and the imposition of specific content or worldviews. Providing *information* to students is important, particularly about civic rights and freedoms.

Deliberative liberals believe that citizenship education is political in its core, and look for a balance between individual and collective action. At the same time, they are careful to stay on a general, theoretical level of political discussion, leaving it to the students to judge current events. They trust their students and aim not to impose any views on them in order »*not to make them copies of ourselves.*«

These teachers follow their students' interests and needs and adapt their teaching practice to the demands and the capacities of the young people they work with. They focus on the individuality of their students.

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tions, in the sense of freedom from partisan struggles. This makes it very difficult to explore, defend, and revise political and ideological positions without being accused of pushing a particular ideological agenda.

In short, deliberative liberals see civic education mainly as a tool for promoting emancipation. Knowledge of individual rights and freedoms is put at the core of their efforts. They strive to equip their students with the necessary tools to operate in a world they see as increasingly complex, to understand political structures and games and to find their path in society. Although they do not promote reckless egoism, these teachers see their students as individuals with inherent rights, and feel compelled to support them in becoming independent, critical citizens who know how to defend and extend their freedom through democratic debate.

Local social guardians: »They need us as a personal example«

Local social guardians differ from all other respondents, who tend to seek a balance between the role of a professional and the role of a teacher. Local social guardians in contrast are convinced that their students need a sense of direction and must be taught to survive. In contrast to pragmatic conservatives, local social guardians see their students as vulnerable and in danger. Their rights could be easily violated because of ignorance and a lack of access to power structures and resources. These teachers see it as their task to educate students about their rights (sometimes also interpreted as entitlements). Teachers do this by providing their students with the necessary knowledge, but also and mostly by establishing themselves as role models. They ascribe an important role to the school as an example of a democratic institution—a safe place to learn the first basics of democracy in a world otherwise chaotic and threatening.

Local social guardians agree with the statement that »politics is too abstract for most students.« However, this agreement is ambivalent, because they see different layers in political education. The respondents claim that their students feel left out, marginalized, and disadvantaged by today's political ruling class in Bulgaria and are thus very cynical towards anything political. The teachers see themselves as an example that there are also positive ways to participate in social life. The respondents strongly encourage community involvement as a low-threshold activity that students understand, even when they are not interested in politics.

They see charitable and community service both as empowering and as a way of teaching responsibility.

In sum, this group of teachers can be placed in the fatalist corner of the grid-group scheme. Their position is unique among all respondents, including those from Croatia and the Netherlands.

Personal growth facilitators: »We teach them to be happy«

A climate of collaboration, to promote free development and personal growth, is a priority for this group of respondents. Participation, action, and involvement are their guiding principles—their motto is »practice what you preach,« also outside the classroom, and set an example of honest and decent behavior. The nature of being human and the values associated with humanity are central to their teaching. Politics as practiced in Bulgaria is seen as something that children should be shielded from for as long as possible.

The respondents in this group use words like »emotions,« »feelings,« »growth,« and »the joy of life,« and care about »overlooked« topics such as ecological education and art education. Growth, harmonic development, and self-realization are the overarching goals of their everyday efforts, Interdependence and taking care of each other are values highly cherished by this group. Not only should students participate and engage in »attitude building,« they should do so as a group, as a way of developing a caring personality.

Personal growth facilitators look at education in a broader context of which school is only a part. Participation in »real life« and engagement at all levels are more important than knowledge and facts. The minimum body of knowledge required is the basics of democracy, as democracy is considered too essential not to be taught explicitly.

This factorial group overlaps most with the egalitarian ideal type, but with a twist. Personal growth is seen as facilitated by participation in a group, rather than directed at group preservation. Again, as in the case of pragmatic conservatives, truly collectivist attitudes are not popular in a

country with a communist past, and are always countered by a healthy dose of self-interest.

Global future debaters: »The street won't turn them into global citizens«

This group underscores the European citizenship dimension the most explicitly. It is, however, divided in its judgment of the value and the success of citizenship education as a European project. One of the respondents who associates strongly with this factor is positive in outlook with a cosmopolitan orientation, while the other, to the contrary, states that citizenship education was implemented under pressure and as an act of compliance—»*just to show off*« and demonstrate that Bulgaria belongs to the European Union.

The global European orientation of this group of teachers makes the choice for an institutional approach logical. Specific social structures and channels of influence are more important than values and abstract ideas. Action is what counts for this group; active defense of and the expansion of freedoms is what they believe makes civic education meaningful.

Global future debaters take a rather pragmatic attitude toward the patriotic discourse that is fashionable in Bulgaria. They do think that students should know »*what this country has achieved in order to go further*.« However, they believe that the growing interdependence of people in the world takes precedence. This interdependence is interpreted at an interpersonal level—students need to learn how to respect each other and to empathize with others and understand their social experience.

In sum, the teachers in this group are more concerned with the future of citizenship education and the future of their students in a global dynamic world than with current practice, which can be disappointing at times. In the grid-group field, this group of teachers is positioned on the egalitarian/individualistic divide.

b) Croatia: On the verge of change

In the Croatian sample, four factors were extracted, presented in figure 3.

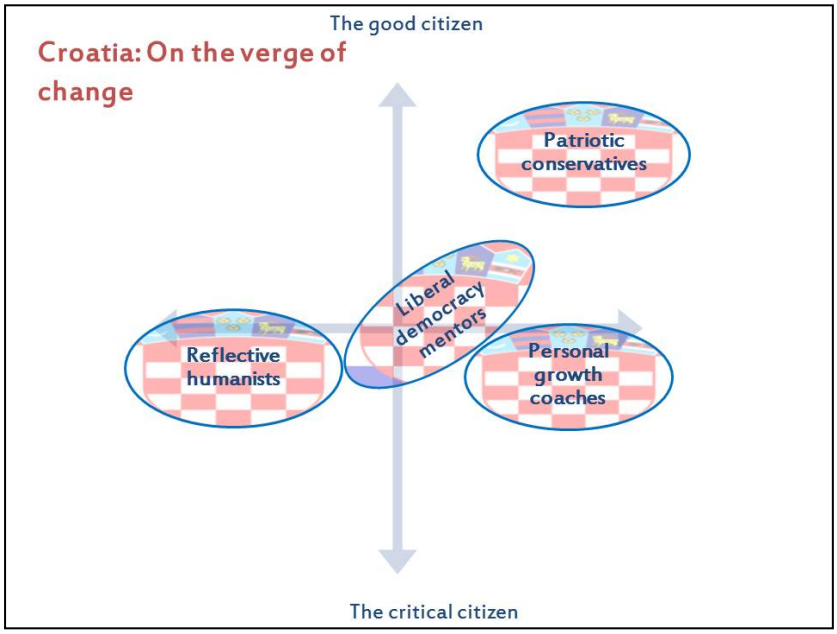

Fig. 3: Four factors in Croatia

Common themes

Croatian teachers show more common ground than their Bulgarian colleagues in their embracing of citizenship education curriculum. Consensus is evident in their emphasis of the need for changing the overall approach to citizenship education in Croatia. The theme of curriculum change was strongly emphasized in the interviews because Croatia, at the moment of data collection, was undergoing a reform of the model and the curriculum for citizenship education as part of acces-

sion to the European Union.[5] When referring to the current curriculum design process, all teachers expressed disagreement with the practice of putting too much stress on knowledge and uncritical acceptance of »facts.« There also seems to be a strong consensus about an inclusive approach to teaching aimed at empowering all students to understand politics. Teachers believe that citizenship education is for all students, not just for elites, including those who »*just like adults, are disappointed in politics*.« Teachers envision a future political citizen who recognizes the importance of politics for other aspects of life. Acts of compassion and generosity are also seen as political in nature. Finally, teachers share the view that the school as an institution, even with a non-democratic structure, serves as a platform for raising democratic citizens.

Reflective humanists: »I am just inviting students to be reflective, nothing more«

Reflective humanists put a strong emphasis on the development of intellectual skills and critical thinking. They see citizenship education mainly as an instrument to help students »survive in today's complex world.« Reflective humanists act as facilitators of students' intellectual growth, yet they put considerable emphasis on »coping.« Rather than being exclusively pragmatic, they appeal to personal morality and to reflection skills as ways of coping with what they perceive as a harsh reality. Consequently, their main concern is to develop their students' ability to use concepts and methods to analyze and understand the world around them. They do this systematically and professionally, based on solid mainstream theory. These teachers reject the idea that laws and rules should be at the center of citizenship education. The respondents' attitude towards any ideology is neutral, but reflexive and open. They are not particularly concerned with directly fostering students' participation in social and political life.

5 When the final version of this article was submitted, the implementation of the new citizenship education program in Croatia had been postponed one year.

Respondents in this group fit in the individualist corner of the group-grid scheme with a bias towards fatalism.

Patriotic conservatives: »The teacher has to be a model of decent behavior«

The main trait of patriotic conservatives is their loyalty to the state. They see themselves as implementers of official state policy and as »old school« models of decent behavior. Patriotic conservatives place high value on patriotism. The teachers in this group thus subscribe to national pride and loyalty, themes that have been popular in Croatia since the 1990s due to its history of war, newly gained independence, and nation building. The teachers in this group also agree that citizenship education is a palliative measure for the lack of tolerance in society. This is why they insist on holding their students accountable and on getting them involved in charitable activities (charity, as opposed to party politics, is seen as »safe« political engagement, because it promotes unity).

Knowledge of laws and rules is central to these teachers' idea of citizenship education. Their most important objective is to offer students sufficient understanding of the basic rules of the main political institutions. They see this as a step towards preparing students for an active contribution to society, following the rules and within the system. Part of this preparation is connected to the school's task of increasing students' employability.

Being critical towards the media is not a big concern of this group of teachers. In general, the development of a critical attitude is not a priority. They shy away from discussing norms and values, as well as from controversial subjects.

The group of pragmatic conservatives clearly stands out from the others and is positioned at the hierarchical corner of the grid-group field.

Liberal democracy mentors: »Citizenship education prepares students for the role of democratic citizens«

The respondents in this group adhere strongly to the values of liberal democracy. In the classroom, they take on the role of empowering mentors. They are not afraid of being biased towards the active promotion of democratic values. As part of establishing a relationship of trust with their pupils, liberal democracy mentors openly discuss their political preferences. This does not mean that they impose their views on their students, however. The teachers in this group strongly agree with the statement that young people should be taught »to be critical and not to believe everything they see and hear in the media.« In order to achieve this, students need to learn how to »employ various methods, theories, and models to explore the world around them.« Rather than offering ready-made rules, the respondents in this group are inclined to look at the processes of and the underlying debates behind established rules and laws.

Although they encourage young people to be critical and oriented towards change, liberal democracy mentors do not encourage students to follow only their private interests. Rather, they teach them to take the common good into account, to respect conventional political channels, and to learn how to gain influence through them.

In summary, liberal democracy mentors lean towards the hierarchic position on the hierarchic-individualist axis.

Personal growth coaches: »We teach independent and responsible young people«

Personal growth coaches are teachers by calling. The pedagogical core of their work is given priority over subject knowledge. They focus on students' personal growth and helping them develop into responsible and autonomous citizens as well as the development of participatory and intellectual competences, seen in a broader perspective. The social side of citizenship takes precedence over politics. Compassion and generosity

are cherished and encouraged, preferably through taking »real life« action.

Critical reflection is central to their teaching and is also applied to norms, »*which should always be discussed*.« This includes raising controversial issues and even personally taking a critical stand toward the state or the status quo. They are inclined to »stir things up,« but only to an extent; this does not imply »*revolutionary acts, but does imply active citizenship that attempts to improve the situation and foster citizens' rights*.«

Typical for this group is a strong connection between independent thinking and accountability. Teachers provide their students with some guidelines, but let them decide independently, reflect on their decisions, and take responsibility for them.

On the group-grid field, personal growth coaches fit into the egalitarian position, with some prominent hierarchic elements related mainly to their strong sense of accountability.

c) The Netherlands: An established professional community

In the Netherlands sample, four factors were extracted, presented in figure 4.

Figure 4. Four factors in the Netherlands

Common themes

The four factors are relatively highly correlated, which indicates a high degree of agreement among Dutch teachers. Additional qualitative analysis is needed to confirm this observation. It is possible that the respondents adhere to different interpretations of statements while ranking them similarly. However at this stage of data processing, this does not seem very likely. There is an outspoken consensus on a number of issues.

All the Dutch respondents approve of the statement: »We have to teach young people to be critical and not to believe everything they see and hear in the media.« This is interesting on two counts. On the one hand, teachers are obviously concerned by the growing power and increasing

influence of the media. In many cases, they see the media as a competing force to the messages they receive at school. In addition, many of them believe that using examples from the media is suitable for teaching critical thinking and reasoning skills. On the other hand, in the new social studies curriculum, which is in its pilot phase now, »Media and communication« is no longer a separate topic of the examination program, in spite of indications that students find it appealing (Schnabel 2009). It will be interesting to see how teachers and students alike will accommodate their preference.

The need to teach »how democracy works and why it is worth defending it« is also undisputed. Teachers do not see this as an attempt to indoctrinate students. Rather, they see it as a specific contribution of their subject—social studies—to the overall task of schools to educate future citizens. In addition, teachers subscribe to the statement »It is better that the teacher discusses norms and values instead of stiffly adhering to neutrality.« On the one hand, this reflects a general consensus on the importance of going beyond »the established facts,« both in the overall sample and in the Bulgarian group. On the other hand, the statement can be seen in the context of an ongoing debate in the Netherlands about the neutrality of the teacher. The topic has a prominent place in teacher training programs and is discussed at length in the standard teacher training textbook (Olgers et al. 2010).

The statement »My task as a teacher is to defend state policies and interests, because I am an employee of a state-financed educational institution« was rejected. Bulgarian teachers also rejected this statement, because they were adamant about not seeing themselves as part of the state. Dutch respondents, however, defended their position with pluralistic arguments – there is no such thing as »a state interest,« so even if they wanted to, they would not know what exactly to defend.

The statement »Citizenship education should cultivate a spirit of unity, loyalty to the state, and national pride« was unanimously rejected using very strong language: »*nationalistic nonsense*,« »*I am allergic to this kind of language*.« Given the current political debate about national identity in the

Netherlands (Pels 2010), it is worth mentioning that teachers do not take part in this discourse. How exactly they will deal with this issue in the classroom, when it is inevitably brought up by students, remains to be seen.

Action learning idealists: »The curriculum is frustrating«

Many of the respondents in this group are young teachers. They are change-oriented, thinking skills-oriented, and act as coaches toward their students. They strongly agree with the statement: »It is not enough to engage in discussion about how to improve the world, it is important to give young people the chance to participate in real life.« The other groups are neutral on this issue, mostly because they think this is not their task as teachers.

The most striking feature of action learning idealists is their frustration about examination programs and the conflict between what they see as important and what they »should« teach for their students to pass the exam. This frustration stems from their strong preference for controversy in the classroom. While the other three groups also agree that controversies should be discussed in class, action learning idealists put controversy and discussion at the center of their teaching. Knowledge and »facts« take second place, however at the end, »*facts are on the exam*.«

Compared to the other teachers, this group does not strongly disagree with the statement »In my opinion, citizenship education is an emergency measure by the state against the obviously growing lack of social tolerance.«

On the grid-group field, these teachers occupy the middle ground between the individualist and the egalitarian positions. The hierarchic elements can be explained with the high correlation between factorial groups.

Critical academics: »Students must think systematically and independently about social structures«

This group consists of teachers involved in national policymaking and social studies curriculum development. This may be coincidental, of course, since our sample is not representative, but it also helps clarify the views of the respondents. In the main, these are teachers with many years of experience.

The critical academics feel more strongly than anyone else that their goal is »to educate thinking citizens who can employ various methods, theories and models to explore the world around them, and who are able to assess facts and arrive at conclusions.« Remarkably, they are the only respondents who subscribe to the suggestion that official study programs are uncritical of democracy. Most of them are involved in writing and evaluating textbooks in one way or another. The users of textbooks do not share their concern. I shall come back to this point later.

These teachers are the least concerned with the pedagogical side of teaching. They are not overly worried about creating a safe environment in their classroom. In conjunction with this, they stand out as a group that shows some understanding for the suggestion that politics »belongs more to elite schools.« While they share this position with the Bulgarian local social guardians, their reasoning is rather different. The Dutch teachers in this group feel that the highly rational and abstract teaching which they greatly prefer is not suitable for every type of student.

Critical academics reject the suggestion that their teaching will contribute to developing the skills necessary for the labor market. They do not see it as their task to encourage students to participate in society. Their focus on theory and academic skills keeps them in a strictly academic role as teachers of a subject with a clearly political core.

The rational, systematic, theory-oriented features of critical academics place them on the individualist side of the group-grid field, with strong hierarchic elements.

Loyal citizens' teachers: »Get involved in social life for the common good, respect the system«

The Loyal Citizens' Teachers are clear about their acceptance of the Dutch political system. They encourage students to contribute positively to Dutch society. The suggestion that the official curriculum is »essentially uncritical« is rejected most by this group. This does not however mean that they blindly follow and implement official state policies.

loyal citizens' Teachers subscribe very strongly to the statement »Students should learn to take into account the common good, rather than follow only their private interests.« Most of all, they encourage their students to get involved in social life through the established institutions, and to listen to experts.

Compared to the action learning idealists and critical academics, these teachers tend to focus more on knowledge and on the acquisition of the skills needed to participate in society. For these teachers, loyalty means active defense of the democratic system—participation in discussion and debate, a critical, but tolerant attitude toward the media. The Loyal Citizens' Teachers are the only group that tends to agree with the idea that school is not democratic enough to help students learn about democracy.

The strong focus on adapted participation, combined with the importance of democratic values and the tendency to abandon neutrality when necessary, places the Loyal Citizens' Teachers in the hierarchical segment of the group-grid field, with some egalitarian elements.

Moral democratic educators: »Coach students to adopt democratic moral standards«

Moral democratic educators define their role very clearly as pedagogical, as opposed to subject specialists. Fostering their students' independence is their most important mission. They do not take a back seat in this process; neither do they assume the role of a devil's advocate, as their Bulgarian colleagues are inclined to do. Rather, these respondents see

themselves as personal examples of moral behavior. The common good is important, but less so than for teachers of loyal citizens. They instead place an accent on encouraging participation and helping students find their place in the world. Moral democratic educators are neutral about specific knowledge, and also not particularly concerned about discussion, debate or research skills. Moral categories define their engagement more than issues and structures. Participation and action are seen as more important than theory. Moral democratic educators adhere to a value-oriented view of citizenship, within the undisputed framework of democracy and a critical attitude toward the media.

In sum, the place of the Mmoral democratic educators is a mix of an egalitarian and an individualistic position, with a slight preference for the egalitarian one.

d) The three countries compared: Ownership of citizenship education; National divides visible

Similarities and differences

In the following section I present some of the interesting findings from a comparison of the three countries. The comparison is based on the qualitative data (only partially processed at the moment) and quantitative data (factor analysis of the whole set, which revealed some shared underlying themes and put some differences in a new light).

When we look at the distribution of the different factors in the three countries, we clearly see a different pattern. In Bulgaria, the factors seem to be distributed predominantly along the fatalist-egalitarian axis, with some individualistic elements. The Croatian sample leans very strongly toward hierarchy, and the Dutch sample is evenly distributed along the individualist-hierarchic axis.

It is not really surprising that respondents only agree in cases of negative consensus—that which teachers do not want to be associated with. There seems to be a bottom line standard of integrity and professionalism for secondary school teachers engaged in political education which

goes beyond national borders. None of the teachers see themselves simply as transmitters of information about a firmly established body of knowledge about rules and laws. Also, none of them think it is enough to teach the »established facts« about society.

The strong rejection of the suggestion that citizenship education would be something for the elite schools is heartening at first glance. However, there are indications that in two of the country-sets, Bulgaria and the Netherlands, this is far from undisputed. In Bulgaria, teachers with a relatively large number of disadvantaged students tend to agree with the statement. In the Netherlands, teachers with long experience and a strongly academic approach are also not so quick to reject it.

In the general sample, some subtle lines of division become visible. Whereas the theme of national unity and loyalty was only strongly represented in the Croatian case, it was implicitly present in Bulgaria as well. The Dutch reaction to anything that referred to »national« was extremely negative. This item was the point of strongest disagreement between respondents. It is very tempting to suspect those East European teachers who emphasized the importance of national cohesion of exhibiting nationalistic tendencies.[6] However this would do injustice to these teachers' earnest attempts to find a difficult balance between their professional standards and the dominant discourse—dictated by the political reality of the day—of pride in one's national identity. Further research including other European countries would shed light on this particular aspect of the study. One thing has become clear so far; although it seems logical to tie different conceptions of citizenship education to different traditions in nation building, our study shows that the particular national context does not define teachers' views in a uniform fashion. Rather, the theme of national identity varies in different

6 Anecdotal evidence suggests that teachers of history and Dutch literature may hold different opinions on the issue of nationalism. Also, the uncritical acceptance of Dutch and »Western« superiority in the textbooks testifies to more ambiguity than our data suggests, but this is a matter for separate investigation.

groups of teachers and is mixed with other contributing elements. This is why no official doctrine would reflect the views of all teachers, and probably not even of the majority of teachers.

The choice between being a teacher and being a subject specialist seems to be a game-changing item. Although most teachers would say that they combine both roles, the final ranking of choices resulted in strong positions in both directions.

Although statistically not a consensus item, the statement »We have to teach young people to be critical and not to believe everything they see and hear in the media« is generally given approval. However, when it comes to an estimation of their success in teaching students to deal critically with the media, teachers tend to give diverse answers.

A substantial number of Bulgarian and Croatian teachers tend to focus more on problems and on the need for a place to discuss and eventually alleviate them, placing less stress on participation. The societies they operate in are somewhat troubled, and normal channels of dialogue are frequently blocked. This is very visible in Bulgaria and to a lesser extent in Croatia. The teachers' mission can be seen as directed toward emancipation and a positive affirmation of the values of nations in transition, still marred by serious corruption scandals, and with a very vulnerable civil society.

One of the surprising emerging themes concerns the dichotomy of knowledge and attitudes. Although initially most teachers claimed that both were important, later they made a clear choice in one direction or another. Two things are worth noting in this respect. First, there seems to be a shared consensus that there is a minimum required knowledge which students should acquire in the course of their education, no matter what the teaching style or teacher preferences. Second, the more experienced the teachers, the less inclined they were to focus on skills without a solid knowledge base. This could be interpreted as conservatism, but maybe the reasons lie elsewhere. Too much stress on innovative teaching methods without taking »no nonsense« teaching into account may unnecessarily alienate many teachers who derive their sense

of professionalism from their subject knowledge. For those eager to introduce yet another innovative, competence-oriented teaching method in the area of citizenship education, this outcome should perhaps act as a warning.

Implications for curriculum and teacher training

The diversity of positions found in each of the three countries should not conceal one important positive feature—teachers have a strong sense of ownership of the idea of citizenship education and a shared baseline professional standard. However, they differ in the ways in which they conceptualize and execute their tasks, not only from country to country, but also from school to school. The research findings demonstrate that taking the national context into account is not enough when adapting curricula from other countries or from European sources. The »national context« is only a common space within which several distinct perspectives coexist, held together by unifying themes. Equally important, a state-initiated policy on citizenship education does not automatically ensure promotion of state-imposed objectives. Quite the opposite, as the case of Bulgaria demonstrates, teachers may use the existing state curriculum as a starting point to demonstrate a corrective position towards what they see as serious shortcomings of the current political reality, in an attempt to educate future citizens who would hopefully do better.

Our data shows that no amount of detailed curriculum requirements, specifications of standards, objectives, and evaluation criteria would erase the diversity of perspectives on citizenship education that teachers exhibit. In this sense, citizenship education in any given country cannot be seen as a single policy project without making it void of its most important feature—preparing young people to be citizens in a presumably pluralistic and democratic society.

In the field of citizenship education, a relatively large amount of attention has been paid to the content and quality of teaching materials. Our data demonstrates that, in general, teachers do not put too much weight

on the books and materials they work with. They remain neutral towards the idea of too much political correctness or lack of criticism in the books. Most mention that they feel equipped to create the necessary discretionary space to work around whatever limitations a book may have. Although the explanations they offer may differ from country to country, the important message for curriculum developers is that too much focus on teaching materials, textbooks, and official programs, as opposed to supporting teachers to develop their professionalism, may prove to be a waste of resources.

Finally, though the ideal of »democratic citizenship« (Council of Europe 2010) may be appealing to many, the majority of teachers do not adhere to this model. Democratic citizenship as promoted by the Council (as one authoritative example) is strongly associated with the egalitarian bias in our typology. All three countries exhibit variations of this type of view. Bulgarian personal growth facilitators, Croatian personal growth coaches and Dutch moral democratic educators share many common elements, in spite of specific accents. But compared to the factors on the hierarchic-individualist axis, these teachers are certainly not a majority. For those who find it desirable to promote »democratic citizenship education« through teacher training, the study sheds a light on the different routes they might follow in order to achieve a substantial shift in teachers' core beliefs.

Discussion and future research themes

Current political events, in particular the protests throughout Eastern Europe, allow us to revisit some of the findings of the study. Since the beginning of the year, Bulgaria is in a state of a deep political crisis, the signs of which we already could demarcate in this study as an enormous divide between political reality and the ideological aspirations of teachers and schools. In a more cynical vein, the study revealed the undercurrent of spouting »official discourse,« largely due to the demands of European Union membership in a country that increasingly exhibits features of a façade democracy. Recent events show the way in which political institutions as a whole are seen as void of content. This makes the value teach-

ers ascribe to school as an institution and the hopes they place in the positive influence of education as a whole and political education in general even more remarkable.

One issue that emerged during the study, though speculative, deserves attention. This is the issue of intergenerational trust. In post-communist countries, the breach between the totalitarian and post-totalitarian generation is so great that teachers often are ready to abdicate from the role of ideological guides for the younger generation, out of fear of contaminating them with what they see as the irreparable damage they suffered from not being brought up as free citizens. By the same token, the opposite position is also possible: teachers tend to minimize the differences between the two systems and in doing so implicitly accuse their students of rejecting everything from the past, including the good things. In general, the theme of intergenerational dialogue may prove to be of great importance to making post-totalitarian societies more comprehensible to »outsiders,« mostly from Western democracies. It is exactly this intergenerational gap that exposes the depth of the problems these societies face on the road to building viable democracies. In the course of the study, it became clear that another dialogue was taking place—not only between researcher and teachers and between teachers themselves, but also between teachers and students. Teachers implicitly and sometimes explicitly referred to their perceptions of students. They explained and justified their ideas about good citizenship education as a response to particular features of their students that they believed needed to be addressed. The ways in which these images of students, as they emerge from the teachers' responses, are intertwined with teachers' views and educational practices is one of the most intriguing issues and remains to be explored in continuations of this study.

Looking back at the theoretical framework of this study, we can formulate two conclusions. First, the data seems to confirm the assumption that views on different aspects of citizenship education, beliefs about education, and the role of the teacher and the school are not randomly combined, but organized around basic core beliefs about politics and

society in general. These can be located within the four main biases of the grid-group framework. Second, the ways these biases are manifested in the respective countries are influenced by specific historic events, by the current political climate, and by educational traditions and practices. The most striking differences between the three countries were in their definition of »political« and »social,« as well their perceived distance to official power. The factor distributions tended to follow the expected general patterns of the national political culture of the three countries: a generally fatalist attitude of mistrust towards power in Bulgaria, a rather hierarchically-oriented and united around its national ideal in Croatia, and a classic liberal democracy with strong trust in government and, simultaneously, strong communitarian features in the Netherlands. A more detailed analysis of the qualitative data is needed to formulate further conclusions in this regard.

A future expansion of the study to include other countries may shed more light on the interplay between universal biases and specific national biases. Particularly interesting would be to see if any shifts occur as regards two topics. First, the issue of national loyalty and identity proved to be game-changing in Croatia, was strongly present in Bulgaria, and adamantly rejected in the Netherlands. Adding other countries to the mix, particularly »old« democracies with a strong tradition of positive national identity, may reveal other undercurrents in this debate. Second, the issue of political education for the masses and for the elites demands further attention. The strong rejection of the idea that politics may be too difficult for most young people may be an artefact of our sample construction, combined with the specific educational structure of the countries. In Bulgaria, there is officially no tracking at high school level, which is where teachers found it most difficult to teach some of the young people. In the Netherlands, the slight approval of this statement by one of the groups was clearly linked to the form of education as well as to the thinking in terms of »levels« inherent to the Dutch education system. This is related to the current debate on what has been dubbed »diploma democracy«—the claim that the uneducated do not participate in political life (Bovens and Wille 2009).

The question of practice still remains open. Do these different views result in observably different teaching practices? Observations of lessons in Bulgaria offer a strong indication that this may be the case. I hope that this research will help teachers to reflect on their views and principles, and make their practice of educating the future citizens of Europe more informed and ultimately more effective.

Finally, I would like to come back to what I consider the two major methodological implications of my findings for comparative studies of post-transition societies. First, if we want to shed a light on developments in post-communist societies beyond national descriptions and post-transitional clichés, such a comparative approach seems viable. It allows for analysis on multiple levels and from various angles, thus transcending national discourses and exposing common themes and potential problems. Second, this approach initiates a dialogue within communities defined in other than national terms and beyond the traditional juxtaposition of East and West. There is a tendency to engage in a »top-down« transfer of knowledge and expertise from the West to the East only. Looking in the opposite direction may provide valuable lessons for Western countries as well. Most of all, this approach offers the opportunity to seriously explore common themes and directions of development for »old« and »new« democracies alike. We need to find ways to »unpack« post-transition societies by highlighting shared themes that are also of great relevance to »established« democracies, thus allowing the East to take on the role of corrective and warning to the West. Transcending national boundaries does not mean ignoring them, however. As I have demonstrated, national educational traditions, general attitudes towards democracy and politics, and current events can all influence the ways teachers think and talk about citizenship education. A word of caution is in order here: this study must be seen as a snapshot of an ongoing debate. This may turn out to be both the most obvious strength and weakness of the method. If we are looking for definitive answers and how-to recipes, the method seems to be a weakness. But if we see research as a step towards deeper understanding and a contribution to a larger democratic dialogue, it is a strength, and the questions

raised shall hopefully invite other scholars and practitioners to look for more complete answers.

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Appendix 1: English statements

The original sample was a mixture of Dutch, English, and Bulgarian sources. The long list was made in Dutch and English. The final short list was translated first into English, then into Bulgarian (discussed and edited by colleagues in Bulgaria), then back into Dutch (double-checked by native speakers and colleagues) and then back into English. The same procedure was followed for Crotaion. Three sets of statements were used for each country's native language.

1. Students need an environment in which they could discuss the problems of society without anyone pointing a finger at them and correcting them.
2. We need to teach young people to be independent and to make their own decisions.
3. I encourage my students to get involved in social life through the established institutions and to listen to expert opinion.
4. These are the rules, these are the laws. I think this is the bulk of citizenship education.
5. The teacher should be a model of honest and decent behaviour, this is the core of citizenship education.
6. We have to teach young people to be critical and not to believe everything they see and hear in the media.
7. The teacher should make it clear to the students that they need to participate in public life if they want to advance in society.
8. Citizenship education should contribute to the development of competences required by the labour market.
9. We should pay more attention to knowledge: to look at how things really are, instead of just discussing how they should be.

10. It is not enough only to engage in discussions about how to improve the world, it is important to give young people the chance to participate in real life.
11. The teacher should stress first of all the anatomy of government: the separation of powers, the functions and prerogatives of the institutions, the different types and purposes of democratic systems.
12. I am pleased when my students begin to discover structures and regularities and when they begin to understand the world of politics.
13. The goal is to educate thinking citizens who can employ various methods, theories and models to explore the world around them, and who are able to assess facts and to arrive at conclusions.
14. It is important that students learn to defend their views in political discussions and social debate; this is why I help them to develop research and discussion skills.
15. Citizenship education should focus on the development of skills and attitudes, much needed for students to survive in today's complex world.
16. Young people may learn the law by heart, but this does not mean they will necessarily obey it.
17. Students should learn to take into account the common good, rather than follow only their private interests.
18. I feel that I am first and foremost a teacher and only then a subject specialist. The subject matter is only secondary.
19. Controversial political problems should not be discussed in class.
20. Citizenship education should not be associated with politics, because individual acts of compassion and generosity are more important.

21. The subject »*Whatever it is called in the country*« is in fact citizenship education. Both are aimed at educating future citizens.
22. Young people should acquire knowledge about democracy: how it works and why is it worth defending it.
23. It is very important that students learn how to analyse social problems, but also select the most important ones.
24. The teacher should present to the class only established facts about society. Social norms are not a suitable topic for teaching.
25. Official citizenship programs are essentially uncritical: democracy is good, we are a democratic state, therefore we are good.
26. The democratic approach to inquiry and debate should be demonstrated in class, in order to encourage students' interest in politics.
27. Students cannot learn democracy at school, because school itself is not a democratic institution.
28. Citizenship education means to hold students accountable for their behaviour and to get them involved charity and community activities.
29. It is better that the teacher discusses norms and values instead of stiffly adhering to neutrality.
30. The teacher should not disclose his or her political views to the students. Quite the opposite, only broadly accepted social and political values should be discussed.
31. My task as a teacher is to defend state policies and interests, because I am an employee of a state-financed educational institution.
32. I am obliged as a citizen and a teacher to stir things up if necessary, and not only through the socalled legitimate political channels.

33. In my opinion, citizenship education is an emergency measure by the state against the obviously growing lack of social tolerance.
34. We should not declare any ideology to be correct; instead, we should give students an opportunity to get acquainted with various ideas about political and social order.
35. The most important task of citizenship education is to inform students about their civil and political rights and freedoms.
36. Citizenship education should be of some use to society, for instance by contributing to greater safety.
37. Citizenship education is an outdated concept, because it conveys to students the values of the middle class.
38. Civic obedience means more than just obeying the law, it means obedience to higher personal standards and higher social interests.
39. Students should be made to realize that they live in a world of growing interdependence. Even though we do not respect each other, we still depend on each other.
40. Citizenship education should cultivate a spirit of unity, loyalty to the state and national pride.
41. For most students politics is way too abstract and incomprehensible, it belongs more to elite schools.

Exploratory study of the professional identity of higher education teachers in Ukraine

Mariya Vitrukh

Introduction

As part of the transformation in economic and political domains over the last 20 years in Ukraine, the education system has also been under reform (Koshmanova 2006; Shaw, Chapman, and Rumyantseva 2011). Ukraine entered the Bologna Process[1] in 2005 (European Commission 2012), making it relevant to focus on the professional identity of higher education (HE) teachers in the post-Soviet context as the country strives to comply with European Higher Education Area (EHEA) guidelines. Education reform[2] have been necessary for compliance with the Bologna Process and one key element is how teachers see themselves and

1 »By May 2005, the Bologna Process was extended to 45 signatory countries with the inclusion of Armenia, Azerbaijan, Georgia, Moldova and Ukraine« (European Commission 2012, 77). The meeting was held in Bergen, Norway. The Bologna Process required a radical change in education in Ukraine, in particular changes in the design of the curriculum, the academic calendar, and student grading procedures, as well as greater emphasis on faculty research (Shaw, Chapman and Rumyantseva 2011).

2 In the context of a highly centralized system of education and financial problems caused by the global economic crisis, there was a need to provide systematic instructional redesign or real support for staff to implement the changes prescribed by the Bologna Process. However, this was not provided and caused Bologna Process implementation results that seem patchy to external observers (Shaw, Chapman and Rumyantseva 2011).

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construct or reconstruct their professional identity in the process (Shaw, Chapman, and Rumyantseva 2011).

Despite criticism, within academic circles, of the current HE system and the prevalence of a teacher-centered approach to teaching (Koshmanova 2006; Koshmanova and Hapon 2007; Koshmanova, Hapon, and Carter 2007; Koshmanova and Ravchyna 2008; Kvit 2011; Silova 2009), little attention has been paid to the aspect of professional identity. However it is important to raise the issue of professional identity among university teachers as, according to Shaw, Chapman, and Rumyantseva (2011), »university faculty are the gatekeepers of higher education reform. Their attitudes and response are crucial in determining the odds of successful reform and the modernisation of higher education« (73–74).

Professional identity is an area that has not been much researched in HE (Clarke, Hyde, and Drennan 2013), and Ukraine is not an exception. Some aspects were partly addressed by Koshmanova and Ravchyna (2008) in their research on teaching stereotypes among Ukrainian HE teachers, however their exploration of professional identity is limited to the self-image and self-esteem of practicing university teachers and concentrates mainly on the preparation of prospective teachers. Other studies focus on the impact of educational reforms (Kvit 2011; Koshmanova 2006; Shaw, Chapman, and Rumyantseva 2011), the roots and manifestations of corruption in institutions of higher education (Osipian 2009; Round and Rodgers 2009), and teacher education (Koshmanova, Hapon, and Carter 2007; Koshmanova and Hapon 2007; Koshmanova and Ravchyna 2008; Koshmanova 2006). There is a need to look at teachers' professional identity from a psychological perspective and explore the stories HE teachers create about their professional identity, including how these stories have evolved through their learning and teaching experiences and the relationship between teachers' professional stories and their working environment. This study also discusses the notion of identity as the basic component of teachers' professional identity. I refer to social identity theory, Kelchtermans' (1993) model of professional identity, and Connelly and Clandinin's (1999) approach to

teachers' professional stories, using their findings as the basis for the research at hand.

Conceptual framework

There is no established definition of the concept of identity. Accordingly, »professional identity« is defined differently by various researchers. Teachers' professional identity has been researched more thoroughly only within recent years (Beijaard, Meijer, and Verloop 2004). Definitions are comprised of a number of conceptions, among them teachers': self-identification (Gao 2012), role (Ajayi 2011), self-image (Cohen 2008; Thomas and Beauchamp 2011), self-reflection (Warin et al. 2006) and vision for the future (Anspal, Eisenschmidt, and Löfström 2012).

A number of terms are used in the literature to refer to novice teachers and experienced teachers as well as to the cognitive constructs created on the basis of these experiences: ideology, personal theories, principles, perspectives, beliefs, and practical knowledge (Kagan 1992). Clandinin and Connelly (1987, 1999) believe that, mostly, these terms define the same concept and constitute the professional identity of teachers. Moreover, despite the debate about the definition and differentiation of the terms *teachers' beliefs* and *teachers' knowledge*, and the degree of insight into teaching offered by each of the terms (see Calderhead and Robson 1991; Goodman 1988; Holm and Kajander 2012; Nespor 1987), for the purpose of this research, the term *teachers' stories* is used as a key term. This term is synonymous with *narratives* and *personal practical knowledge* as used by Connelly and Clandinin (1999) and encompasses both *beliefs* and *knowledge* about teaching.

Clandinin, Connelly, and colleagues (Clandinin, Connelly, and Craig 1995; Connelly and Clandinin 1988, 1999) were pioneers in the use of language, particularly the narrative approach, to explore the *professional knowledge landscape*. They attempted to frame the understanding of teaching as a profession (Elbaz-Luwisch 2007). Clandinin and Connelly (1988, 1999) emphasized the role of time, space, and interaction in the shaping of a professional identity through the discourses created at work. The stories created by teachers are largely influenced by their context or

working environment within a particular time span and by their interactions with students, colleagues, and administrators. In other words, these stories are formed by a teaching context while they also influence teaching styles and approaches.

Not only the teaching context, but also teachers' beliefs and values play a major role in the teaching process (Clark 1988; Pajares 1992), as they can explain decisions made by teachers and their behavior in the teaching context (Bandura 1986). Moreover, awareness of these beliefs is crucial for the enhancement of teaching practice and re-shaping teaching tasks (Clark 1988; Pajares 1992). These beliefs are rooted in students' consciousness before they even start their university or college lives (Florio-Ruane and Lensmire 1990; Wilson 1990). They are constructed through observation during early school years (Pajares 1992)—a finding that was also corroborated in the current study—and may or may not be re-shaped later during the teaching career (Kagan 1992). The possibility of change depends largely on academic communities, which see themselves as part of a distinct sector of society and provide the community with the language to (re-)shape professional identity (Henkel 2005). Professional identity is not static (Henkel 2000), but rather a dynamic process of re-interpretation of experiences (Clarke, Hyde, and Drennan 2013). Thus, academic identities are »influenced by individual values and beliefs, as well as by institutional culture and positioning« (Billot 2010, 713).

According to social identity theory, which has its origin in the works of Tajfel and later Turner (Hogg and Turner 1985; Tajfel, Billig, Bundy, and Flament 1971; Tajfel 1959, 1969, 1982; J. C. Turner, Brown, and Tajfel 1979), there are two classes of identity: *social identity,* which defines the self in terms of group membership(s) and »the value and emotional significance attached to that membership« (Tajfel 2010, 2), and *personal identity,* which refers to idiosyncratic personal relationship and traits (John C. Turner and Oakes 1989).

In this research, I use Kogan's (2000) perspective on the professional identity of academics, which he defines as being both »individual and social« (210). Kogan (2000) further developed Henkel's (2000) concept of

academic identity as a distinctive individual with his or her conceptual framework, unique history, and identification with the community, adding the idea of an individual embedded within a particular community with its own language, practices, beliefs, and values. Such a perspective is similar to Kelchtermans' (1993) approach to professional identity. Kelchtermans (1993) distinguishes between the *professional self*, the perception teachers have about themselves, and *subjective educational theory*, teachers' belief systems and knowledge about their profession. In my research, I integrate both concepts into my approach to the study of professional identity. Perception of oneself as a teacher does not always coincide with the general social views of the teaching profession that lay the basis for teachers' belief systems; thus individual and social identities are explored.

In addition, drawing on what Connelly and Clandinin (1999) call *personal practical knowledge* or *teachers' professional knowledge landscape,* constituting a »narrative education concept« (1), in this research I explore the stories that HE teachers create about their professional life. In Connelly and Clandinin's understanding, personal practical knowledge is »in the teacher's past experience, in the teacher's present mind and body, and in the future plans and actions. Personal practical knowledge is found in the teacher's practice. It is, for any teacher, a particular way of reconstructing the past and the intentions of the future to deal with the exigencies of a present situation« (Connelly and Clandinin 1988, 25). Moreover, there is a clear distinction between *in-classroom* and *out-of-classroom* sites. The former is a safe environment where teachers practice with their students. The latter refers to institutional prescriptions and instructions that exist outside the classroom as well as to discussions that teachers have once they leave the classroom (Connelly and Clandinin, 1999). This distinction was marked in the interviews conducted with teachers for this study.

Kelchtermans (1993) emphasizes that teachers not only define their present experiences, but also analyze the past and try to envisage the future. This idea is similar to the notion of personal practical knowledge introduced by Connelly and Clandinin (1999). Kelchtermans' (1993) model of

teachers' professional identity consists of five features. The first is *self-image*. This includes the way people describe themselves as teachers as well as descriptions others provide about them. Second is *self-esteem,* or people's evaluation of themselves as teachers. Teachers often associate self-esteem with positive relations with their students and with student feedback. Self-esteem is also achieved through finding a balance between self-image and the intrinsic professional norms applied by teachers. Kelchtermans understands the third feature, *job motivation*, as the reasons that motivate teachers to choose and remain at a certain workplace. The fourth feature is *task perception*. This is the definition teachers ascribe to their job. Task perception is largely built upon work in the classroom and student feedback, as well as cooperation with colleagues. Finally, *future perspective* defines the prospects that teachers see for themselves, their expectations and plans for future development. I used this model to analyze the findings of my study and to gain insight into teachers' stories within the educational context described below.

Identity challenges faced by higher education teachers in Ukraine

Ukraine is (and other CIS nations are) characterized by corruption that has driven down the quality of education after the collapse of Soviet Union (Osipian 2009; Round and Rodgers 2009; Isaxanli 2005; Temple and Petrov 2006). Further characteristics of the Ukrainian educational system are poor funding (Isaxanli 2005; Temple and Petrov 2006; Silova 2009), feminization of the teaching profession, the low popularity of the profession among students, and high staff turnover (Koshmanova and Ravchyna 2008; Kvit 2011; Silova 2009; Koshmanova, Hapon, and Carter 2007; Koshmanova and Hapon 2007; Koshmanova 2006), as well as a decrease in the status of the teaching profession (Silova 2009; Round and Rodgers 2009).

Early attempts to reform the education system in Ukraine in 1993 had two major goals (Koshmanova 2006). The first objective was to build a new national identity. The second goal was to make the education system inherited from Soviet times more democratic. This reform was followed by the Bologna Process in 2005. The European approach was taken as a

model for improving the education system. However, according to some researchers (Koshmanova 2006; Shaw, Chapman, and Rumyantseva 2011), although reforms were introduced and, formally, teachers followed a student-centered approach, a majority of teachers reverted to teacher-centered or »authoritarian« approaches, a method that in their eyes ensured better learning outcomes (Koshmanova 2006). Such an approach is rather conservative, with an absence of interaction and dialogue, and an emphasis on the right answer. The teacher is in control of the learning process and transmits knowledge to the students. The role of the student remains rather passive—to absorb and memorize the information provided.

The Ukrainian higher education system is still highly centralized and there is little academic freedom within universities. Teachers have few opportunities to participate in decision-making processes or to introduce changes into the curriculum (Filiatreau 2011; Kvit 2011; Shaw, Chapman, and Rumyantseva 2011). Teacher morale is also undermined by a number of other factors. Education was highly esteemed in Soviet times, and this view is still present in society. For this reason, teaching was an admirable and very prestigious profession (Round and Rodgers 2009; Silova 2009). During the post-Soviet transition era, political change and economic instability caused a drastic decrease in salaries (Silova 2009). Teachers no longer earned enough to cover their basic needs (Slantcheva 2003, 443) and most teachers sought additional jobs (Round and Rodgers 2009) or stopped teaching (Silova 2009). In addition, low financial rewards caused a feminization of the teaching profession and lowered the profession's status (Silova 2009).

Education policy has been influenced not only by financial, but also by labor market factors. In Ukraine, a higher education degree is necessary to receive employment (Round and Rodgers 2009). Therefore a large number of secondary school graduates apply to universities irrespective of their wish to continue education. As a result, it became common practice in most universities to pay an informal »fee« or receive additional tutoring in order to enter university or to pass university exams (Round and Rodgers 2009). Such methods of augmenting low salaries are met

with understanding in society. Thus corruption, which was popular during Soviet time as a major method of receiving basic goods and services, became legitimized and is perceived as the social norm in higher education institutions (Round and Rodgers 2009).

Furthermore, following the requirements of the Bologna Process, the teaching-oriented culture of universities has now shifted to research. This puts additional pressure on teachers, considering the immense teaching workload and the financial austerity measures (Shaw, Chapman, and Rumyantseva 2011). Teachers are caught in a conflict between external structural changes and an internal course that continues to be practiced within institutions of higher education despite supposed conformity to external expectations (Shaw, Chapman, and Rumyantseva 2011).

Changes introduced by the Bologna Process in practice remain exterior and formal, »the rhetoric of change« is developing faster than reality (Shaw, Chapman, and Rumyantseva 2011, 87). Koshmanova and colleagues (Koshmanova 2006, 2011; Koshmanova and Hapon 2007; Koshmanova and Ravchyna 2008) have stressed that the rather conservative approach to education, with an absence of interaction and dialogue, does not provide students with good professional preparation and makes extrinsic motivation prevalent among students (Ryan and Deci 2000). Thus one aim that should be pursued in Ukraine is »getting rid of authoritarianism« (Koshmanova and Ravchyna 2008). Understanding teachers' professional identity may be a crucial step towards necessary changes.

Methodology

The study at hand was conducted in one of the leading universities in western Ukraine. The institution was selected because it is accredited as a national university and is ranked one of the top universities in foreign language teaching and translation studies.

Participants were selected using a purposive sample; nine female teachers from the same department were interviewed in the period between May

14 and May 22, 2013. All participants started their university teaching careers after Ukraine's independence and received their education before the Bologna Process. The sample had a good balance of those who taught at the university before and after the launch of the Bologna Process, all respondents were employed at the same university department between 2 and 10 years. Participants were chosen so as to have representatives from the same area who share similar teaching methodologies. Also, participants were expected to have at least two years of teaching experience at the university so that they could retrospectively trace their perception of themselves as teachers. All the respondents teach English as a second language, which provides a very specific professional identity. However, due to an immense departmental workload, all also teach a number of other courses with larger numbers of students than in regular language classes. Moreover, some of the participants have their own lecture courses, providing them with a broader understanding of the teaching process and contributing to their academic identity. On average, each participant taught 14 classes per week and each class lasts 80 minutes. The number of classes did not influence salary. The respondents involved in the study have the same academic rank despite varying work experience.

Because sampling, in particular purposive sampling, is conducted using nonprobability design and because of the limited number of participants, representation and generalizability are restricted (Frankfort-Nachmias and Nachmias 2008). The main goal of this qualitative exploratory research was to gain insight into how social experience is established and how it acquires meaning (Denzin and Lincoln 2000). It is believed that narrative inquiry into and thematic analysis of teachers' professional identity (or stories) can reveal aspects that are not elicited in any other way (Connelly and Clandinin 1999; Kelchtermans 1993). Therefore semi-structured interviews were used to elicit responses and examine the stories university teachers create about their professional identities. My research interest was in how these stories have evolved during the course of the teachers' learning and teaching experiences and in the relationship between teachers' professional stories and their working environment.

Each interview lasted approximately one hour. All interviews were conducted in English as all of the participants have been proficient in the language for at least the last 15 years and use it regularly in teaching and translation.

Interview transcripts were analyzed using a data-driven or inductive method of thematic analysis to explore semantic themes on the explicit level and latent themes on the interpretative level (Braun and Clarke 2006).

Findings

The data suggest that the stories teachers create about their practice vary from teacher to teacher, revealing that even within the same department and under the same working conditions, attitudes, values, and approaches to teaching may be different. The analysis revealed seven main themes: 1) subject-centered approach, 2) student-centered approach, 3) the concept of teachers as specialists, 4) early ideas about teaching, 5) development of the teacher's image during their career, 6) cooperation with colleagues, and 7) the relationship between institutional rules and the teacher's professional identity.

What stories do university teachers create about their current professional identity?

All of the participants raised common issues or problems during the interviews. However, their perceptions of and attitudes towards the issues were quite different. Analysis of convergent and divergent features of participants' stories revealed three initial themes that correspond with teaching approaches (subject-centered approach, student-centered approach, and the teacher as a specialist). Each of these three themes/ approaches includes similar values, beliefs, attitudes, and visions and was further explored following Kelchtermans' (1993) model of teachers' professional identity. A comparative analysis of the three approaches is provided in Figure 1.

Kelchtermans' model (1993)	**Teachers' descriptions of their professional identity**		
	Subject-centered approach (K.M. and Z.O)	**Student-centered approach** (B.R., A.S., and C.W.)	**Teacher-as-specialist approach** (M.C., P.S., C.V., and T.F.)
Self-image	A practitioner in the field	Directs students through their learning path	Organizer of the teaching process
	Researcher	Motivates students	Motivates students
	Competent in the subject	A guide	An advisor
	Open to cooperation	A conductor	A mentor
	No longer an authority in the classroom	A leader	A leader
	Approachable	A monitor	A teacher has to treat each student equally and with respect
	An assistant in the learning process, ready to help	A director	
	Sees students as part of the equation and involves them in the teaching process	Light at the end of the tunnel	
	Moderator and facilitator of	Provides knowledge	

	teaching process		
	Compassionate	Teaching is an inborn quality	
	Self-development	Demanding	
Self-esteem	Feeling of satisfaction when your students approach you after some time to thank you and/or ask for advice	Students' achievements are essential	Students' results are an indicator of good work*
	Feeling of enjoyment when students approach after classes to ask questions	Students' positive feedback is important	
	Feeling enjoyment when you can share your experience with students	Students' progress is an indicator of good work	
		Students' appreciation and feedback are vital for work	
		Treat student success as their own	
Task perception	Share experience	Find specific approach to each group of students	Achieve the goals set for the course
	Help students to reach their full potential	Use diverse approaches	Achieve the objectives of the course
	Teach students to be selective about infor-	Adapt teaching to students' needs	Create motivating, friendly, and favorable environment

	mation		
		Create friendly environment	Teach where to look for information
		Adjust teaching methods to make students interested	Make students interested in the subject
		Give students the initiative in the learning process	Teach students to work as a team
			Teach how to learn efficiently
			Create space for discussion during class
Job motives	Cooperation with students	Love of teaching	Love teaching and work with students
	Stability of the job	Teaching is a state job	Teaching is a prestigious job
	Prestigious profession	Absence of a better offer	Trying out the profession
	Love of the research process	Influence of parents and husband	
	Convenient schedule		
	This job allows the combination of work and passion: it gives space for research and opportunity to share it in teaching		
Future perspective	To share passion for translation	To have better working conditions	To be less in control during classes
	To give students more practical knowledge	University should provide better facilities	To introduce more purpose-oriented classes
	To continue research	More up-to-date equipment and software would make	To better organize and structure classes

	teaching more efficient	
University should provide better facilities		To start a tailored course on teaching English to students in different fields and prepare textbooks for them
To give lectures on the topic of interest		

**Student feedback was not mentioned by any of the participants throughout the interview.*

Fig. 1: A subject-centered approach, student-centered approach and teacher-as-specialist approach according to Kelchtermans' model

Despite the belief that the teacher-centered approach to teaching prevails in Ukrainian HE (Koshmanova 2006; Koshmanova and Ravchyna 2008), the data revealed that other approaches are becoming more popular. Although the boundaries between the approaches are not rigid, two out of nine participants clearly exhibited attitudes and made emphases that gave reason to categorize them as teachers who value ***subject-centered*** teaching.

One of the main characteristics of the subject-centered approach is academics' love of what they teach (Rowland 2008; Palmer 2010). The student and the teacher are brought together around particular disciplinary interests (Morrison-Saunders and Hobson 2013) and share their intellectual interest by engaging in a conversation in which the learner is an »inquirer« (Ashworth 2004) who interacts with a subject. The teacher is there to support students by guiding them through difficulties and by motivating them (Morrison-Saunders and Hobson 2013).

For interviewees K.M. and Z.O., there are no spatial borders between in-classroom and out-of-classroom times. They make their passion and their interests the center of their teaching and of in-classroom life. Throughout the whole interview, this aspect was very pronounced and was reflected in all their answers.

Both teachers emphasized that sharing their research interests and their experiences as practicing translators is one of their main aims. Their most commonly stated aim was to teach students how to learn and how to make use of the information that is available from a variety of sources. As K.M. put it:

> *Right now there is so much information around and it's accessible at a tip of your finger. […] The teachers' role now is maybe, helping students to make sense of this information and to show them how to use it.*

Her image of herself as a facilitator is strongly reflected in her practice. Her main aim is not to pass on knowledge, as is the stereotypical view of teachers in Ukraine (Koshmanova and Ravchyna 2008), but to provide tools so that students can work individually. Z.O. has a similar perception of her role as a teacher. Apart from enabling her students to be more independent in their studies, she mentioned that for her »*teaching is to help students to open their potential.*«

Kelchtermans (1993) highlights that each teacher has their own personal program and measures to evaluate students' performance. Teaching is believed to be an emotional profession (Hargreaves 1998) that is heavily reliant on student feedback and on the opinions of colleagues (Warin et. al. 2006). For Z.O., her students' feedback is an indicator that helps her to evaluate her work and that inspires her to continue.

Apart from sharing their passion for the subject with students, other reasons for staying in the profession given by both teachers were the convenience of the academic year schedule and the working atmosphere, which is not as stressful as working »*for example, in business.*« Moreover, both view a teaching position as prestigious, despite the decrease in the status of the profession. This may be explained by their preference for stability, which they believe their current job provides.

Nevertheless, their working environment (Anspal, Eisenschmidt, and Löfström 2012) and stereotypes about the role of teachers (Koshmanova and Ravchyna 2008) both had an observable influence on their self-description as teachers. Z.O. mentioned that as she is young and not very tall she found it »*very surprising that students almost always listened to me*

quietly and never questioned my, so to say, authority in the teaching room.« Despite the fact that she emphasizes the importance of cooperation, the concept of the teacher as an imposing figure is rooted in her imagination. A similar descriptive statement was made by K.M. At the beginning of her career—and even now—she viewed entering the classroom as an intrusion into her students' pre-formed group. It should be mentioned that students in Ukraine study in the same groups during their undergraduate studies, and by graduation form a tightly-knit group. They do not necessarily become friends, but they spend a lot of time together and know each other quite well. Thus her feeling may be explained by her wish to be accepted by the group in order to be able to openly share her knowledge and passion.

Three other participants (B.R., A.S. and C.W.) focused mainly on students and teaching approaches during the interview. These teachers use a *student-centered approach* to teaching and concentrate on the needs and interests of the learner (Brown 2008). The main goal of such an approach is to create a favorable, supportive environment and make learning engaging in order to deepen students' knowledge (Morrison-Saunders and Hobson 2013).

Dynamics within a class largely depends on the students, and teachers very often find ways to help their particular group that vary greatly from textbook examples (Clandinin and Connelly 1996). All participants stressed that each group of students they teach is different, as are the students within the group. That is why they see their main goal as exploring ways of teaching that are efficient and suitable for a particular group. For these teachers, teaching means creating a productive learning environment in which students can fulfil their potential. They agreed that experience and self-improvement are helpful for dealing with issues that arise.

The image that the three teachers within this group have about themselves is noticeably different from the previous group. All of the participants in this group view the teacher as a leader, a guide or a director of the learning process. The teacher's role is more dominant and central in comparison with the previous group, although they also see their efforts

as directed at students. This group views the teacher not only as a leader, but also as a person who provides knowledge and shows practical ways of applying the information given to students. They believe that their experience outside the university as interpreters, translators, and tutors gives them more perspective and a better idea of which aspects might be important for their students after graduation. Student feedback, which was central for the previous group of teachers, is also important for this student-centered group of teachers, but is not a main feature of their stories.

A striking characteristic was found in this group of teachers. C.W. described a teacher not just as a knowledgeable person, but also as

> *somebody that students admire and look up to. […] [the] appearance of a teacher plays an important part. Teacher is a person that students look at with wide-opened eyes and really want to copy and admire.*

For her, appearance is as important as knowledge and experience. This may be explained by the belief in society that teachers are enthusiasts who have a low income (Round and Rodgers 2009; Silova 2009). Appearance may serve as an indicator of higher status and of a respected profession. Teachers in this group admit that they feel undervalued. As A.S. put it:

> *Well, I can't see that I occupy some special place in society. But, generally, teachers as category should have a certain role because, without teachers, independently, to get some education, it's next to impossible.*

All of the teachers with a student-centered approach believe that teachers play a crucial role in the learning process.

Motives to stay in the profession varied within this group. Most of the teachers said that they enjoy teaching. Another strong motive is their perception of the job as stable and secure. Such perceptions coincide with the previous group. However, while teachers from the previous group did not consider that a priority, for this group it is one of the main reasons to stay in the profession. B.R. said that she is a postgraduate student working on her dissertation and finds it difficult to leave the

position due to her parents' pressure. It was quite surprising that she did not mention her research work throughout the whole interview. Despite the low salary, all three participants agreed that the convenient schedule and summer holidays are another reason to stay.

Some teachers set clear spatial borders between their in-classroom and out-of-classroom environments (Connelly and Clandinin 1999). They live according to stories created by the institution and sustain these narratives as a community, supporting one another in their common beliefs and values. The third group of teachers (T.F., P.S., D.V., and M.C.) was characterized by their vision of teaching as, primarily, a job. Unlike the teachers of the student-centered approach, who adjust their approach to students' needs, teachers from this group adjust their own stories to the instructions and stories that are created by the university. In other words, they are living a *specialist teachers' story* (Connelly and Clandinin 1999). Their approach is based more on methodologies and techniques.

For all participants within this group, a teacher is an organizer of the teaching process and a mentor, although the amount of control that teachers are willing to take during class varies among the teachers in the group. However they take more control than the teachers with subject-centered and student-centered approaches. As D.V., in her self-description of herself as a teacher, said: »*I'm more confident with knowing that I'm the boss. […] I'm leading them, I'm organizing them.*« For her, the teacher is a key figure in the learning process. She is a person who is »*self-organized, disciplined, and punctual,*« who takes the responsibility for the teaching/learning process and creates a working environment.

M.C. has a similar view, but she also thinks that this role should change so that the teacher is more of a mediator. Nevertheless, it can be seen that for M.C., the teacher still has a leadership position in the classroom, despite her belief that teachers should take less control and be mediators. Discrepancies in her descriptions of teachers became even more marked later during the conversation when she said,

> *Well, probably I would agree with the traditional view of a teacher in our society that it is not only a person who teaches the material and keeps to the syllabus and generally to the curriculum of the university but that is a person who also, teaches […] about the society and how to behave in society.*

This vision of a teacher as an advisor and a role model was mentioned by the other two teachers as well.

These teachers' self-descriptions are closely related to ideas expressed by Sukhomlinskiĭ (1981), who says that a teacher has to combine upbringing and instruction. A teacher is viewed as a person whose objective is not only to share knowledge, but also to promote morality. Nevertheless, it was interesting to observe that for the subject-centered group of teachers, the focus has shifted. For example, K.M. believes that students are »*conscious people*« and her task is not to teach them how to behave, but to discuss »*more important issues*« which are related to the subject. So her understanding of a teacher as a »role model« is quite different and is more related to the subject than to issues of upbringing.

Task perception was interwoven with self-evaluation. One of the main criteria for all the teachers from this group was to achieve the objectives they set at the beginning of the class. When the goals were achieved, it was an indicator that a class had been a success. Student feedback, mentioned by the first and the second groups, was not touched upon by this group during the interview. Nevertheless, all teachers from the third group mentioned that one of the main reasons for them to stay in the profession is that they enjoy teaching. Thus, on the one hand, teachers express a wish to create a positive context, whilst, on the other hand, they want to control the whole process and feel the need to manage it from beginning to end.

The three thematic approaches delineated above are the result of the participants' own learning experiences, their collaboration with colleagues, and their working conditions, as described in detail below.

How have these stories evolved through the teachers' learning and teaching experiences?

Teachers enter their careers with internalized ideas about good and bad teaching that they gain during their school years (Kagan 1992; Pajares 1992). It was interesting to observe that when I asked participants to share their very first memories about the teaching profession—theme four: *early ideas about teaching*—stories about their future profession were rather diverse, and for most participants not closely related to teaching.

However most participants mentioned that they did sometimes model themselves on their first teachers. For some, the first experience with teaching was not positive. For example, C.W. stated »*I didn't really like my first teacher.*« Despite this, she still enjoyed imagining herself as a teacher: »*Just somehow naturally I really liked teaching. I did play with toys, I placed everybody in a class.*« Other participants' early stories were diverse. A.S. said »*when I was a child, I was dreaming of becoming a musician.*« B.R. and D.V. also mentioned that they did not want to become teachers.

Nevertheless, for varying reasons, all of the participants have been in the profession for the last two to ten years. Most participants said that, as high achievers, they were offered a position at the university and due to the lack of other options they accepted the offer. All participants agreed that their school and, partly, university learning experience influence their teaching style.

The fifth theme—*development of the image of teachers during their career*—covers several aspects of image development: sources of the teachers' ideas about good teaching, reflections on the early stages of their careers, and how their approach to teaching changed over the time.

All of the participants said that their first teaching experience was very different from what they expected and made them realize that their education did not sufficiently prepare them for teaching practice. This may be explained partly by the lack of connection between the theory taught during classes on pedagogics and the practical application of this information (Aitken and Mildon 1991). Lacking support as regards their developmental needs, teachers felt they were in a »sink or swim« posi-

tion. That is the major reason why they were forced to follow the models of teaching they experienced as pupils or students rather than reflect on their theoretical background and their own practical experience. K.M. mentioned that she had to »*blindly*« continue with her teaching, asking for advice from her colleagues and relying largely on her experience during her own time as a student, and the approaches to teaching and learning she met with at the time. This story was similar for other participants, who however said that their colleagues eagerly shared their experience. Teachers often mentioned that they have had to change or adopt the image they had before their career because the real conditions of work made them question their earlier narratives.

Most participants acknowledged that their beliefs and approaches remained largely the same despite what they were taught in the context of the Bologna Process and that they relied heavily on observation of their school and university teachers in order to create their own image of what good teaching is. K.M., Z.O., and C.W. mentioned that their experience of studying abroad made a great impact on their understanding of teaching and their practice in general. They said that they try to apply some of the methods experienced abroad in their work. The influence of such different positive contexts (Anspal, Eisenschmidt, and Löfström 2012) made them reflect on their teaching practice and re-shape their approaches to teaching.

One of the reasons teachers hold to their previous belief systems can be explained through the concept of »schemata.« Every new experience and new knowledge acquired undergoes a kind of filtering process and is viewed through the prism of a pre-established system of beliefs (Pajares, 1992). In order to modify the existing belief system, novices undergo a number of personal changes within a community.

What is the relation between teachers' professional stories and their working environment?

It was noticed that participants often referred to »authorities,« for example, colleagues and leaders in the field (Kelchtermans 1993). Teachers balance their self-descriptions (ibid.) by having discussions with

colleagues and comparing their own teaching approaches to that of others. This observation constitutes theme six: *cooperation with colleagues*. The information received from an authoritative figure is later made congruent with pre-existing practice and is interwoven into a teacher's personal story. This idea was stressed by Hollingsworth (1989), who mentioned the importance of cooperation between novice teachers and their senior colleagues, as it helps to modify the beliefs a young teacher holds at the beginning of her career. Novice teachers may feel cognitive dissonance because their own self-image and beliefs do not coincide with those of more experienced and practiced colleagues.

Participants with a subject-centered approach or story (K.M. and Z.O.) mentioned that they consider cooperation with colleagues to be »*perfunctory*« and »*mostly limited to discussion of some paper work*« (K.M.). Moreover, as Z.O. said, every teacher has a personal style and »*cooperation is not very much invited there.*« These two teachers created stories about the environment at the department that differed from the other participants as regards sharing information and the usefulness of cooperation. They stressed that collaboration with colleagues does not have much influence on their teaching style. Z.O. and K.M. create their in-classroom stories, but prefer not to share them in their out-of-classroom space, as they potentially may not be understood (Connelly and Clandinin 1999). However, teachers who relied largely on the methods used by their colleagues and who followed institutional rules found the discussions useful. Teachers with a student-centered approach were more optimistic about their working environment and their relations with colleagues. Teachers from that group believed that such conversations are useful. The third group of teachers, with a specialist teacher's story, considered such cooperation to be an essential part of their teaching process. They stressed the importance of being able to discuss different in-classroom stories, to »*share materials and experience*« (M.C.).

All of the participants mentioned that they »*faced the reality*« (K.M.) of teaching. In addition to difficulties regarding the lack of knowledge, preparation, and self-confidence mentioned above, it was striking to hear Z.O. say that »*students are not that problematic as many colleagues try to paint*

them and as I used to think as a beginner.« This example shows how some of the novice teachers re-shape their perception of teachers and the teaching process through reflection, and construct an identity that is contrary to their colleagues' stories. However, most of the participants were open to the stories they heard at their workplace, and adapted to them.

Apart from the influence of the people teachers work with, the institution's story has a strong effect on teachers' identity. As Connelly and Clandinin (1999) mention, their working environment often makes teachers stressed, hardened, and resistant to change. This leads to theme seven: *relationship between institutional rules and the teacher's professional identity*.

Any institutional change can make teachers feel that their professional identity is being violated or threatened. It can make them resist the change and feel insecure (Connelly and Clandinin 1999). However the Bologna Process brought a lot of institutional changes and participants did not express feelings of frustration or insecurity. Six participants mentioned that the major change they see is an increase of administrative paperwork. For example, K.M. described the new system by saying »*the road to hell is paved with good intentions.*« She further explained that »*in fact, we're still working according to this, you know, Soviet notions of what education should be.*« A.S.'s perception of alterations to education is similar, »*I would say that maybe the whole idea was ok. But generally our reality is different and it should have been tailored more, somehow, to our reality.*« Three teachers (C.W., P.S., and Z.O.) mentioned that they find certain aspects of the new system helpful. For example, C.W. and T.F. said that they like the system of grades; »*I like to give students grades according to the new system of grading. That's the only effect of Bologna process that we got*« (C.W.). However, D.V. mentioned that new grading is »*really confusing for students and teachers.*« P.S., in contrast, considers the new reform to be beneficial for students as it requires them to have more tests, and serves as a good preparation and review for exams.

Despite their diverse attitudes towards and perceptions of the Bologna Process, all participants said that it does not influence their approach to teaching and does not prevent them from following their previous practice. For them, the major change was the increased amount of

paperwork and the change of the grading system. However this made them feel insecure about the education system as a whole rather than about the Bologna Process. All participants expressed concern and distress about the fact that they have no voice in creating curriculum, although they admitted that very often they take a risk and introduce their own topics rather than following the written rules. They also feel powerless and unimportant when it comes to administrative issues, as their voice is not taken into account. Another theme expressed by all teachers from all three groups was low salary and lack of space and resources. These aspects noticeably affected the morale of the teachers.

Discussion

Koshmanova and colleagues (Koshmanova and Hapon 2007; Koshmanova and Ravchyna 2008; Koshmanova 2006), in their study of university teachers and in particular of Ukrainian stereotypes about teaching and issues of national identity, stress that the teaching approach in Ukraine is rather teacher-centered or authoritarian. They mention that, despite this general tendency, attempts are still made to make classes more interactive. Nevertheless this issue was not explored in their studies as such attempts are occasional and not systematic.

The findings of my research suggest that there has been a shift, at least within the department studied, in teachers' perception of the relations between teachers and students, as well as a desire to improve the teaching environment. It was observed that even the third group of teachers, categorized as perpetuating the idea of teachers as specialists, were aware of the control they take in the classroom.

The stories created by teachers vary greatly, from feeling that the profession is their vocation and an emphasis on the nobility of the job to the perception of work as a set of duties, obligations, and tasks. Such views of the teaching profession are not unique to Ukrainian university teachers and were also observed and described by Connelly and Clandinin (1999). The stories teachers live by influence their approach to teaching, their cooperation with colleagues, their motivation, and their efficacy.

Three types of stories were identified: subject-centered, student-centered, and centered around professional specialization.

The data suggests that for the subject-centered group of teachers, the spatial borders of teaching (Connelly and Clandinin 1999) are erased. These teachers concentrate on the subject matter and build relations with their students as equal participants in the education process. They facilitate learning rather than control it. However, the influence of the teacher-centered model was still observed in their responses. For both Z.O. and K.M., relations between teachers and students are in a kind of opposition, with students are on one side and teachers on the other, albeit not as strongly as for the other two groups. However, with more experience, the two teachers with a subject-centered approach managed to create space for interaction with students.

The second group of teachers—characterized as taking a student-centered approach—views the role of the teacher as dominant and central in terms of organizing the learning process and selecting the information to be provided and discussed. However, all participants who took a student-centered approach highlighted the importance of their experience as practicing translators and interpreters and its influence on their approach to teaching. Moreover, they emphasized the need to upgrade equipment and facilities for students' training and specified the changes necessary so that students might acquire skills more relevant in the current market. This may serve as an indicator that the nature of their profession made these teachers more practice-oriented. Teachers in this group, as practicing translators and interpreters, clearly see which practical skills students need. All of them admitted that they risk not adhering to the curriculum and go against institutional rules in order to provide students with more relevant information and situations that they may face in their future careers.

The third group of participants, categorized as teachers who see themselves as specialists, perceive their job as a set of goals to be achieved. They are more controlling in their relations with students. Three out of four participants from this group mentioned that they do their best to treat all students equally and with respect. They emphasized the im-

portance of motivating students and creating a productive environment, however the distance or border between teachers and students is quite strong. Also, the analysis of the interviews showed that teachers from this group believe that one of their tasks is to determine students' »moral qualities« (Sukhomlinskiĭ 1981, 1).

No direct influence of age or number of years in the profession could be observed on participants' teaching approach or the stories they created. However, it was noticeable that international experience, namely studying abroad, influenced teachers' reflection on their practice and their teaching style. In addition, most participants mentioned that they lacked workshops or trainings on teaching methods, which may serve as an indicator of their openness to self-development and change.

A larger study involving more participants and implementing the same methodology may be able to explore whether the stories created by teachers vary in various departments within the same university. Moreover, inclusion of universities from different parts of Ukraine could explore the issue of the influence of the perception of national identity on teachers' self-image and, consequently, teaching approaches. Finally, equal participation of male and female university teachers would be of benefit for a more representative sample.

Conclusions

The topic of teachers' professional identity in Ukraine has not been given the attention it deserves and remains under-researched. This study represents a first attempt to gain insight into teachers' professional lives from a psychological perspective. The study revealed that teachers follow their schoolteachers' and, to a lesser extent, university teachers' approaches to teaching, as well as asking colleagues for advice. As some participants mentioned, their university courses on pedagogy did not sufficiently prepare them for entering the teaching profession. These may be the reasons for the teacher-centered or authoritarian approach still being practiced, as observed by Koshmanova (2006). As teachers do not have alternative experiences, they adhere to the approaches they experienced themselves. However, all participants acknowledged that

they have additional jobs, and for some their university career is not their main job. Non-teaching experience allows them to earn additional income and to get a better understanding and vision of the teaching materials that should be provided as well as the approach to use to share this information.

All participants admitted that the major noticeable change in their work brought by the Bologna Process was additional administrative paperwork and the change in the grading system. However, they agreed that it did not influence their approach to teaching. Moreover, despite the emphasis of Bologna requirements on research work, most of the participants said that this did not have much effect on them. Due to their immense teaching workload and the need to take on additional work outside the university, they have no time to work on their research.

It may be concluded that despite a general tendency that is a legacy of Soviet times, there has been a shift in teaching approaches within the department under study. The research demonstrated that within the department there are at least three different approaches to teaching: subject-centered, student-centered, and centered around specialization. As the boundary between the approaches is not rigid, more favorable working conditions and increased motivation, as well as professional training for teachers, could be a trigger for changes in teaching approaches to create more space for students to develop and explore their potential, gain better professional expertise, and develop critical thinking skills.

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Educational governance activities and the rise of educational contagion in the Islamic Maghreb

The case of Tunisia

Tavis D. Jules and Teresa Barton

Introduction

Educational governance activities[1]—the funding, provision, ownership, and regulation of education (Dale 2005)—are no longer solely conducted by state apparatuses, but are now a permanent feature and orthodoxy of the »politics of education« at the transnational and transdiscursive levels. We build upon the insights of the »pluri-scalar mechanisms of governance« (Robertson, Bonal, and Dale 2002) to empirically conceptualize the scalar dynamics of transitological educational governance activities and politics in post-authoritarian and post-revolutionary settings and contexts (hereinafter post-spaces) in comparative and international education. We use a »historical-comparative or comparative-historical approach« (Cowen 2000; Larsen 2010; Schriewer 2002), grounded in an historical policy analysis (HPA) (Hanberger 2003; Jules 2013a; Jules 2013b; Schram 1993; Torgerson 1996) of national educational policies to illustrate how various policy discourses arose in the post-authoritarian period in Tunisia. Such a methodology illuminates how perceived educational problems are first rescaled endogenously by exogenous forces during different »transitologies«—the collapses of one empire and

1 Following Dale (2005) we use »educational governance activities« as a generic term to encompass the funding, provision, ownership, and regulation of education that may be carried out independently by different actors that are endogenous or exogenous to the nation state.

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its replacement with another (Cowen 2000)—within the context of the project of modernity. We see Tunisia's post-spaces as consisting of the (i) post-independence policyscape, (ii) post-Bourguiba policyscape (first authoritarian president), and (iii) post-Ben Ali policyscape (second authoritarian president). These post-spaces stem from some form of regime change and from internal uprisings and have ultimately shaped Tunisia's transitologies.

A plethora of studies have concentrated on Tunisia's political transitologies by illuminating the precipitous collapse of one of the most unwavering countries in the Arabic world (Chomiak and Entelis 2011; Schraeder and Redissi 2011) by drawing attention to several internal factors. These include its economic system and excessive unemployment (Hibou, Meddeb, and Hamdi 2011), the three perceived myths (economic miracle, democratic gradualism, and *laicité*[2]) credited to Ben Ali's regime (Cavatorta and Haugbølle 2012), and the role of external actors (Youngs 2011) in the massive uprisings against the regime, as well as the conceivable broader lessons that the Arabic world could learn from the Jasmine Revolution (Murphy 2011; Pickard 2011). Few studies have sought to empirically study the historical impact of Tunisia's political transitologies on educational governance activities. Governance in post-spaces is a spatial scale based on the outcomes of struggles between social forces that are embedded within the contestations of power and capability (Robertson 2010). In focusing on Tunisia, the most recent state to emerge within post-authoritarian spaces, our emphasis is on understanding the political role of the »*mukhabarat* (intelligence-based) police state [based on a] ›strong neo-corporatist state‹ or the ›force of obedience‹ or an ›authoritarian syndrome‹« (Schraeder and Redissi 2011, 5–6) in relation to the role and function of education in Tunisian society.

2 *laicité* links economic underdevelopment closely with cultural and religious backwardness that had to be eliminated through subscription to modernizing values and the French model of social development (see Cavatorta and Haugbølle 2012).

This paper draws on political economy literature, particularly on the concept of »financial contagion,« to propose the rise of »educational contagion«—the spreading of ideas due to spillovers—within post-authoritarian and post-revolutionary spaces and across different scales. Financial contagion occurs as a result of several small economic shocks that initially affect only a few institutions, a particular region or a specific section of the economy, and then begin to spread across the entire economic system. The ripple effects of these small shocks are driven by economic fluctuations and ultimately lead to a tsunami of policy solutions. In applying this concept to an empirical conceptualization of education in post-authoritarian and post-revolutionary settings and contexts, we aim to understand how educational policy ideas spread across various regions of a country. We propose a »a model in which small shocks lead to large effects by means of contagion, more precisely, in which a shock within a single sector [such as education] can spread to other sectors and lead to an economy wide financial crisis« (Allen and Gale 2000, 3). *Apropos* to our argument, educational contagion outcomes may be derived from a scalar empirical analysis of educational governance activities in post-spaces. This paper suggests that countries are subjected to different externalities as they construct imagined post-spaces or »imagined communities« (Anderson 1991; see also Sadiki 2002) in the aftermath of regime changes, since they are greatly influenced by regional and global processes. Within this context, this paper sets out to argue that educational contagion, embedded within a broader framework of scales, is but one empirical approach that we can use to understand how processes of globalization and regional integration influence post-spaces. Our starting point is the national policy level of the Tunisian educational system. Simultaneously, we pay attention to the processes and actors above and below the state level, since the pluri-scalar mechanisms of governance allow us to understand the »coordination of activities, actors/agents and scales through which education is constructed and delivered in national societies« (Simons, Olssen, and Peters 2009, 78).

Our principal argument is that scales help us to understand the rise of regulated educational governance activities and the subsequent outcome

of educational contagion in a particular context. First, we recognize that authoritarianism is a problematic concept to define and even more precarious when applied to the nation-state (Heryanto and Hadiz 2005). In conceptualizing educational governance activities, we draw on a variety of literatures in comparative and international education to show how the different levels of »scale« (Robertson, Bonal, and Dale 2002; Robertson 2012), the projectability of »scoptic systems« (Sobe and Ortegon 2009), and the broader cultural, historical, and political investigation of »vertical studies« (Bartlett and Vavrus 2011; Vavrus and Bartlett 2006) within »policyscapes« (Carney 2009) provide an opportunity for us to consider the way in which policy ideas flow within and between different aspects of the policy environment in post-spaces. We use such an elaborate framework, giving these approaches a particular treatment or viewing them through the »optique of globalization« (Carney 2011), since one cannot study »post-spaces« in education without locating and accounting for the various governance mechanisms that have managed and regulated education prior to the emergence of new spaces. Second, we make an assessment by employing an HPA aimed at exploring the question: how has educational policymaking been regulated and governed in Tunisia's post-spaces? For us, education is one of many regulated and governed aspects of the post-authoritarian spaces that exist at different scalar levels in Tunisia. Third, this paper is an attempt to scrutinize and wrestle with the nature of the problems that confront post-authoritarian Tunisia in light of its historical past. This is done by briefly reviewing the historical and post-independence aspects of education in Tunisia. The premise of this essay suggests that even at the height of authoritarianism in Tunisia, education was seen as essential and as part of the regime's civilizing mission. Finally, we gauge the Tunisian example by examining major reform agendas, along with the actors, agents, and institutions that promoted them.

Post-spaces as vertical comparisons, scopic systems, and policyscapes

In examining the notion of scale in post-authoritarian spaces we draw on the work of Robertson, Bonal, and Dale (2002) and Robertson (2012), who argue that scales are constructs that take place at different levels that are entwined and fixed through different processes. Struggles between actors (political and others) may occur at any level within a scale and consequently produce different outcomes. Thus pluri-scalar governance pays attention to how education is delivered and constructed as well as to the power relations that arise during the coordination of activities, actors, and agents at different scales in post-spaces (Dale 2005; Robertson, Bonal, and Dale 2002; Simons, Olssen, and Peters 2009; Verger 2009). Whereas Dale's (2005) work uses *a priori* elements to suggest that movement towards governance can be categorized by the emergence of a multilayer or pluri-scalar process that involves non-state actors/agents in national decision-making, our focus here is on the *posteriori* conceptualization of governance activities regarding educational politics. In building upon the existent governance research that pays attention to the scales of governance (sub-national, national, and supranational) in relation to the institutions or agents (state, market, community, and household) that coordinate these various scales, resulting in the »coordination of coordination« (Dale 2005; Robertson, Bonal, and Dale 2002), our work draws attention to the embryonic scalar dynamics of governance activities before they move up the decision-making ladder to the transnational level (Mundy 2007). Educational governance is multidimensional, multileveled, and multiscalar, and therefore, educational governance activities in post-spaces take place at the subnational, national, supranational or regional, and international levels. Any analysis of national governance structures should draw attention to both the »»politics of education‹ in capitalist societies and to ›education politics‹ as specific events within governance structures« (Simons, Olssen, and Peters 2009, 79). We therefore examine pluri-scalar patterns of coordination since educational reforms in post-spaces are »now being asked to do different things in different ways, rather than the same

things in different ways« while on the systemic level »the constitution of education sectors may be in the process of changing, with a development of parallel sectors at different scales with different responsibilities« (Dale 2005, 117).

In essence, we use Robertson's (2012) typology as a conceptual approach to the study of governance activities in post-spaces, and suggest that these spaces represent a »›condition of the world,‹ ›discourse,‹ ›project,‹ ›scale‹ and ›means of identifying the reach of particular actors‹« (35). As conditions of the world, processes of globalization, American exceptionalism, neoliberalism, and post-Washington censuses shape post-spaces. As a discourse, post-spaces are invoked as a means of splitting with the past and constructing a revisionist view of history. As a project, post-spaces structure the perceptions and scopes through which particular educational challenges and solutions are framed. Finally, as a scale, post-spaces allow actors to pick and choose which ideas will be legitimized and which will be discouraged. Therefore, by empirically conceptualizing post-spaces, we can begin to see these spaces as part of a vertical landscape within which we can situate past and present discourses in order to understand »multi-layered and cross cutting proceeds and modes of interaction« or what has been called »situatedness« or »embeddedness« (Robertson 2012, 39). In other words, vertical comparisons draw attention to the »politics of knowledge production« (Vavrus and Bartlett 2006), particularly in an era of regulated governance in which »[…] nation-states continue to be central players in a globalizing world, but partly as local agents of global forces, for the nation-state now operates within global economic constraints« (Marginson and Mollis 2001, 601). Such recognition of the changing role of the nation-state implies that we need to develop a different empirical approach to situate the new geo-political educational architecture of power in a globalizing world.

In returning to the ways in which we can empirically study policy discourse in post-spaces, »scopic systems in education« (Sobe and Ortegon 2009) invite us to examine how education, historically and in

the present, has been projected globally. Sobe and Ortegon (2009, 59) challenge us to use scopic systems in education to think about »projected realities (and the means of projection)« (59) that are central to »performance legitimacy« (Huntington 1991) in any regime. In heeding this call, we take Sobe and Ortegon's (2009) notion of the projection of globality a bit further by suggesting that the »totality and reflexive comprehensiveness of projection and reality« (58) is a *condition* and not a process, since it is not a result of technological innovation. Globality is seen as a new »condition or state in which things are global,« which stems »from conscious and intentional actions of individuals and collective human actors« (Shaw 2000, 17–18). In locating the array of scopic systems that exist in post-spaces, we focus on identifying how these systems have historically and in the present projected ideas of education. Educational scopic systems represent a form of power that frames educational challenges within the policy environment and tries to find solutions by employing mechanisms that ultimately reinforce social practices over time (Robertson 2011; Robertson 2012). While scopic systems help us to understand the projectability of globality as constructed through the national optic, vertical comparisons allow us to »grasp the complexity of the relationships between the knowledge claims among actors with different social locations as an attempt to situate local action and interpretation within a broader cultural, historical, and political investigation« (Bartlett and Vavrus 2011, 96). In other words, the context within which post-spaces operate, taking into consideration the »historical trends, social structures and national and international forces [that] shape local processes« (Vavrus and Bartlett 2006, 96). Vertical comparisons not only help us to understand how projected realities occur in post-revolutionary spaces, but also focus on understanding how social interactions are shaped by institutional forces, across nations as well as across different political periods. These comparisons help us to understand how multilevel dimensions ultimately allow the construction and subsequent projection of a version of reality that authoritarian regimes strive to maintain in the form of performance legitimacy. At the end of the day, legitimacy matters in any post-space, and thus any empirical

study of post-revolutionary or post-authoritarian spaces must consider the role of performance legitimacy in shaping and constructing a country's identity as projected to the rest of the world. For us, vertical comparisons are ways to explain the claims to legitimacy bolstered by the persuasive use of state propaganda, the illusion of political inclusiveness, the supply of standard public goods, and the dispensing of patronage through client networks (Burnell 2006).

The final element we suggest is critical to understanding post-spaces is a focus on policyscapes, as notions of globality are projected across different scales within the policy environment. Like Carney, (2009, 2011), we uses policyscape as a way to understand »the spread of policy ideas and pedagogical practices across different national school systems« (68). However, in applying this notion to post-spaces, the aim is to look at policy diffusion through both vertical and horizontal lenses to capture the ideological essences that remain after regime implosion, giving rise to post-spaces that are focused on creating a new imagined community. Vertical comparisons of scales within post-spaces allow us to draw attention to the lived consequences of entanglement that exist within an imagined community. The aim of such a comparative approach is to better understand the horizontal and vertical spatiality of transnational flows and how they affect educational systems (see Ferguson 2006). Policyscapes allow us to focus on the »time present transitologies« (Cowen 2000) that shape educational systems and spaces in the aftermath of regime collapse, given the changing nature of regional and international architecture and their impact upon practices and processes. Transitologies, for Cowen (2000), have a shelf life of 10 years and stem from the collapse and reconstruction of »(a) state apparatuses; (b) social and economic stratification systems; and (c) political visions of the future; in which (d) education is given a major symbolic and reconstructionist role in these social processes of destroying the past and redefining the future« (338). If we accept that the Tunisian revolution began December 17, 2010 with the self-immolation of the fruit vendor Tarek al-Tayeb Mohamed Bouazizi, then Tunisia represents a prime example of how we

should study transitologies in post-spaces by drawing from the vertical and horizontal scales that exist within the policyscape.

We shall now turn to historicizing Tunisia's educational systems to show the emergence of Tunisia's transitological policyscape.

Transitological educational governance activities in Tunisian history

As noted above, governance can be broken down into independent activities—funding, provision, ownership, and regulation—that are carried out by different actors/institutions (market, community or household) in addition to the state, thus giving rise to a pluri-scalar module (Dale 1997). It is therefore the coordination of these independent activities by state and non-state actors/institutions that signals the rise of governance. This does not mean that the state is absent from governance activities, in fact the state is still actively present »through its role as ›coordinator in chief‹ that determines by whom and under what conditions government will be accomplished« (Dale 2005, 129). However, because of space constraints, the paper will only focus on educational governance activities during transitologies. For us, educational governance activities during political transitions represent a new and distinctive aspect in the study of the rise of pluri-scalar governance in that »transitological moments« (Cowen 2000) help us to understand the process of rescaling governance activities during times of crisis.

Tunisia's pre-independence educational system can be categorized in »pre-protectorate education« and »protectorate education.« Such a distinction draws attention to the scalar dynamics of educational reform in Tunisia and to why its subsequent leaders broke from the past to project an »imagined community« around education reform. It is during the transition from a French protectorate to an independent country in 1956 that we see the evolution of different scales of educational governance activities as well as how new policyscapes were constructed to protect these activities. Long before Tunisia became a protectorate of France, education was of high priority in the North African country. With one of

the most advanced Muslim educational systems in the Maghreb region, traditional education in the 19th century largely consisted of religious schools (madrassas). A small percentage of Tunisian children attended Islamic primary schools, *kuttabs*, where students learned the Qur'an thoroughly (Ling 1979). These small schools were often connected to local mosques and were privately funded. The most promising students furthered their religious studies by attending city mosques—the most prestigious among them being Ez Zitouna mosque and university, located in Tunis (DeGorge 2002; Sizer 1971). Founded in 734 C. E. and technically a secondary school, Ez Zitouna was considered the most important center of Islamic scholarship in the Maghreb region (Berry and Rinehart 1987). In the pre-protectorate period, educational governance activities were imbedded in religiosity, since the curriculum largely focused on the Arabic language and the Qur'an, with similar pedagogical methods as *kuttabs*, albeit much more advanced (Green 1978). The small number of graduates from the mosque often took positions as Islamic teachers or judges in Sharia courts, or became members of the Ulama ranks—an exclusive group of religious leaders (Green 1978; Micaud 1964). As Tunisia began to take steps towards modernization in the 19th century, Ez Zitouna remained conservative and aimed to keep »Islamic tradition alive by carrying out its ritual and legal duties« (Sizer 1971, 6). Gaining acceptance into Ez Zitouna was difficult, with only 800–900 students enrolled annually (Green 1978). Students had to have graduated with high standing from a *kuttab*, be at least 12 years old, able to read and write, and have a large portion of the Qur'an memorized (Sizer 1971). In the 1870s, Prime Minister Khair al-Din, who had lived in Europe in the 1860s, began to focus his attention on modernizing Tunisian educational institutions, especially Ez Zitouna, whose educational governance activities were still religiously driven. Since graduates of the university often held bureaucratic positions, he aimed to reform the university to match the needs of contemporary Tunisians (Perkins 1986). In the end, Ez Zitouna and is educational activities remained conservative, with few changes to the curriculum.

On the initiative of Prime Minister Mohammed al Sodok, Sadiki College (technically a secondary school) was established and opened its doors in 1875. The modern college aimed to train young Tunisians for state service (Perkins 1986) and offered gifted Tunisians lessons in European languages and sciences (Anderson 1986). Sadiki's curriculum was divided into three sections and spanned eight years. The first two sections covered »the Koran [Qur'an], grammar, literature, rhetoric, logic, and jurisprudence. The third section was optional and reserved for the most gifted« (Sizer 1971, 7). Languages offered under the third section consisted of Turkish, French, and Italian. The college also offered instruction in rational sciences, although instructors (some foreign) were advised to »inculcate love of the Faith and to discourage questioning from the students« (Sizer 1971, 7). The Sadiki design was an »early model of bilingual and bi-cultural education« (Sizer 1971, 7) and became the standard for future educational endeavors under French rule.

When the French took control of Tunisia in 1881, they found an education system consisting of *kuttabs*, Ez Zitouna, and Sadiki College. French officials originally stated that little changes would be made to the Tunisian education system, but a growing European population, from 77,000 in 1895 to 129,000 in 1905, put pressure on the government to provide more European educational institutions (Sizer 1971). The first transitological moment of education in Tunisia commenced in 1883 when the education system was placed under *la Direction de l'Enseignement Public,* with Louis Machuel appointed Director of Education (Green 1978). Machuel was put in charge of all schools, including religious institutions. The newly established school system closely resembled and was integrated with the school system in France (Sizer 1971). By establishing a unified system, officials intended to draw the European and Tunisian populations together. The institutional expansion of assimilationist Francophone education policies aimed to create »an elite cherishing metropolitan values—Black Frenchman« (Clignet and Foster 1964, 191), leading to a centralized political framework with some local autonomy. For the French administration, the main goal of education was »that a modern education would facilitate relations between France

and the native people by fostering an understanding of the Arab-Islamic culture and the newly arrived European cultures« (DeGorge 2002, 580–81). Further, the government needed an educated Tunisian workforce to fill government positions. It is within this transition that we see the creation of a separate schooling system and policyscape in which governance activities are state-motivated and meant to fulfill bureaucratic requirements.

Taking a modest approach, Louis Machuel left the *kuttabs*, untouched and established new Franco-Arab schools to pragmatically instruct both French and Tunisian students in modern subjects in French. These schools were loosely modeled after the bi-cultural Sadiki design, with Arabic and Italian taught as second languages. Some geography of the North African region was included. The schools were intended to be open to all citizens (French and Tunisian), but many Tunisian Muslim students were excluded because of their low proficiency in French (Sizer 1971). Although the schools achieved some success in desegregating European and Tunisian students, the proportion of French to Tunisian students remained unequal throughout the protectorate—the schools never enrolled more than a fifth of the region's eligible students (Perkins 1986). Along with the new Franco-Arab schools, the French administration also opened a European-style French secondary school, *Lycée Carnot*, in 1881. This school utilized the same system as *lycées* in France, and the entire staff was French. Again, as in the Franco-Arab schools, the language of instruction was French (DeGorge 2002). Historically, we can see that the establishment of the Franco-Arabic schools and *lycées* represents the first movement of governance activities away from religious control and towards the rise of the state as chief coordinator within a very centralized French bureaucratic system. The modern approaches employed by the new educational division favored a European education system; traditional Arabic schools and the Arabic language were viewed as inferior and were paid little heed.

In considering the pluri-scalar appeal of educational governance and the »tiered nature of political authority in addition to that located nationally«

(Lingard and Rawolle 2011, 99) we suggest that a plausible hypothesis of educational activities of governance within transitory post-spaces is driven by educational framings at the political level. For example, one of the earliest political framings of educational governance activities was the opening of Sadiki College in 1875, which was a calculated move by Prime Minister Mohammed al Sodok. The Sadiki design is an example of how political processes and interactions yield surprisingly effective educational reforms during different transitological moments, when the foci of activities, actors/agents, and scales of governance are endogenously developed and reformed to accommodate the structures and processes of modernity—placing considerable attention on the nation-state, national education systems, and the individual (see Chabbott 2003; Meyer et al. 1997).

Sadiki College remained the premier center of learning. With its highly competitive entrance examinations, »its graduates were almost assured government positions by virtue of their advanced training in modern subjects and in the increasingly important French language« (Perkins 1986, 88–89). Graduates from Sadiki and the other modern education establishments began to criticize the recently adopted education system. They argued for their own society's need »to make room for concepts and practices then current in the West but without discarding the Arabo-Islamic traditions in which it rested« (Perkins 1986, 92). In response to their concerns, alumni began publishing a new newspaper—*al Hadira*—that promoted societal change while maintaining Islamic principles (Perkins 1896). This led to the opening of a new educational organization in 1896, Khalduniyyah, which was designed to provide a European curriculum for students attending Zitouna in addition to their Islamic education (Anderson 1986). Although the Sadiki graduates worked in tandem with French officials to establish Khaldiuniyya (Micaud 1964), officials became concerned that the modern education system was »creating an educated elite who could cause political problems« (DeGorge 2002, 583). Their concerns were substantiated; Tunisians became less passive and more concerned with maintaining their culture while simultaneously demanding access to schools with modern curricula.

These political reformers became known as *Jeunes Tunisiens*, named after the Turkish revolutionaries, the Young Turks (DeGorge 2002). One of their most salient demands was to make modern education more readily available to all Tunisians, in both urban and rural areas. As a result, the Department of Public Education began to deny access to European-style education for Tunisians (Anderson 1986).

This initial pushback from French officials did not last long. From 1914 to 1942, student attendance and the number of schools established to educate both Tunisians and the French increased. In 1914, Tunisia's education system consisted of 30 private schools and 288 public schools. Most of the schools were primary schools, along with one *lycée* for boys, a secondary school for girls, two colleges, two normal schools, and a professional school. In 1942, in addition to new primary schools, technical and professional training institutes were opened. Further, *jardine scolaries* were established for practical training in agriculture (Sizer 1971). Finally, putting the educational processes in perspective, a conference was held in Tunis in 1949 to address educational issues and »proposals called for teaching methods suitable for the Tunisian child, programs adapted to local realities, and the use of Arabic as a vehicular language« (Sizer 1971, 12). The conference, along with a report commissioned by the French government, brought a twenty-year plan, to fruition, the *Plan de Scolarisation Totale de la Tunisie* (1949–1969), which expanded France's educational governance activities within Tunisia. The plan addressed demographic, economic, and cultural concerns within the current education system, such as providing educational options for girls, preparing students to aid in the development of the country, and the need for an elite Arab-Muslim class to fill government positions. The plan succeeded in increasing the population of children receiving an education, but »the proportion of eligible children in school remained between thirty and thirty-five percent« (Sizer 1971, 16). Education continued to be for the elite and wealthy.

In sum, by the 19th century, Tunisian educational governance activities existed in bifurcated and stratified policyscapes, with a traditional system

dating back centuries and linked to religion, and an elitist, centralized, French, state-driven system. Individual activities, funding, provision, ownership, and regulation during the pre-independence period were divided among different entities and across different scales. By the end of the protectorate in 1956, only ten percent of the population was receiving an education (DeGorge 2002). Traditional Tunisian schools were nearly the same as in the pre-protectorate era, and the »French system was merely juxtaposed to it, more modern in outlook, but transposed directly from France with little adaption to local needs« (Sizer 1971, 18). Although the reforms brought about during French rule created more schools, they also created an educational space that was highly complex and incongruous.

Transitologies and imagined post-spaces

In post-spaces, the broader narratives of transitologies show traces of Robertson's (2012) typology discussed above, especially the condition, discourse, project, and scale that define government mechanisms. Whereas governance activities were splintered in the protectorate period, a vertical comparison shows that during the independence period, governance activities were streamlined under the control of the state apparatus. In applying Robertson's (2012) conceptual approach to the study of governance activities, we suggest that in post-spaces, conditions of the world shape notions of modernity as embedded in post-colonial projects that in turn fashion the activities of governances. We see the project as challenges confronting educational activities, framed in a way that prioritizes the state's agenda. Discourse uses transitologies to project an illusion of what can be possible once there is a radical discontinuity from the past and scale constitutes the ways in which actors frame reform. Cowen (2000) warns that transitologies are dramatic and occur quickly; however our HPA shows that Tunisia's post-independence educational transitologies are now in their third wave. The first wave of transitologies began in the post-independence period of Tunisia's release from France as a protectorate, when the educational policyscape was transferred to the new post-protectorate administration.

In 1957, the French proclaimed Tunisia a republic and subsequently named Habib Bourguiba—»father of the nation,« »Supreme Warrior,« and »Combatant, Supreme«—president. Bourguiba swiftly placed education at the forefront of his agenda, and stressed the importance of education for social advancement (Rossi 1967). Bourguiba's governmental activities placed emphasis on expanding educational access, both in urban and in rural areas, to provide more opportunities for all children in Tunisia, not solely the elite. The country had a long way to go—at Independence »less than one quarter of Tunisian children were in primary schools, and fewer than five percent of the school-aged population had been exposed to modern secondary education« (Berry and Rinehart 1987, 128). The Education Act of 1958 attempted to remedy this. Within the post-protectorate policyscape created by Bourguiba, all educational governance activities were absorbed with developing the necessary human resources for the modernization project as conceived by him. The fundamental tenants of Bourguiba's modernization project, and the evolution of appropriate governance activities, were voiced within the 1956 Code du Statut Personnel (Code of Personal Status) that went into effect in 1957. The code prohibited polygamy, granted women and men the same rights, introduced a minimum age for marriage, permitted women to initiate divorce, and mandated the right to education for women. As part of Bourguiba's new educational policyscape, school curricula and textbooks were modernized to reduce religious influence while simultaneously widening participation.

The 1958 ten-year education plan not only addressed educational access and expansion, but also aimed at both the unification and Tunisification of the country (Fryer and Jules 2012; Sizer 1971). This move thus cemented the government's role, a clear change in governance practices. In the post-protectorate policyscape, the Tunisification process was embedded in the governance activity of regulation. Bourguiba's aim was to ensure that education was a central component of the state apparatus. The Tunisification process had three core elements: »(i) evoking history; (ii) enhancing culture and religion; and (iii) promoting gender equity« (Fryer and Jules 2012). Education in the immediate post-independence

period used »education to create citizen-subjects […] in which Westernization and Tunisian Islamic culture would be ›synthesized‹« (Champagne 2007, 204). After decades of French rule, the country needed to establish a unique Tunisian identity. Further, the government desired a cadre of workers that could replace French personnel and improve the economic conditions of the country. All educational institutions were first placed under one secular institution (DeGorge 2002), the Ministry of Education (MOE), which strove to reform education from the ground up. Higher education reform was placed on hold until more Tunisian youths were prepared for university level courses (Sizer 1971). Although the plan set out to transform the current education system, the French model still provided the framework for the Tunisian government.

Universal primary education, free to all Tunisian children, was the first goal—set to be accomplished by 1968 (Sizer 1971). Every child had the right to primary education; however, secondary education was designed to be more selective. Beginning at age six, Tunisian children were to attend primary school for a total of seven years. Soon after the national plan went into effect, overcrowding issues arose and the quality of education deteriorated (Allman 1979). Further, there was a shortage of qualified teachers and space. To rectify these issues, the MOE cut weekly school hours in half during the first two years of primary school, from 30 to 15, which allowed schools to operate in shifts. Students attended school for 25 hours a week and the seventh year of primary school was eliminated (Allman 1979; Sizer 1971). Utilizing a bilingual approach, students were taught in Arabic for the first two years and then were instructed for ten hours a day in French from the third year on. While the French model of schooling continued to permeate the Tunisian educational infrastructure, the Tunisification, or nationalization, of Tunisia became an integral part of the revamped education system (Sizer 1971).

The Education Act limited secondary education, which was considered selective, but not elitist. Entrance was gained through high scores on a

competitive national exam taken during the last year of primary school. The duration of secondary school was six years. However, after the first year of general instruction, students were tracked into different fields—making students more adept in certain subjects (Allman 1979). Early specialization also aimed to prepare students for universities, specifically universities considered more modern. After Independence and the centralization of governance activities under the state, religious institutions lost their appeal and were considered impractical (Micaud 1964). Ez Zitouna's prestige wavered, especially after the creation of the University of Tunis in 1960, which catered to students who wished to fill positions formerly held by the French or students who wished to go abroad for work or study (Rossi 1967).

For the most post, Tunisians considered the reforms successful. By 1967, 90 percent of school-aged boys and 50 percent of girls were receiving a primary education (Sizer 1971). However, a report released in the same year resulted in some alterations to the 1958 plan. As more students attended school, issues relating to educational quality became prevalent. In some areas, primary education was increased to the original 30 hours a week, and all primary classrooms became co-educational. The plan also encouraged smaller class sizes (Sizer 1971).

Throughout the rest of Bourguiba's presidency, he focused on the governance activity of educational provision that contributed to the rise in school attendance in primary school and secondary school. However, low quality remained an on-going issue. The University of Tunis continued to expand and gain prestige, although many qualified students chose to attend universities abroad. All things considered, by the mid-1980s the reforms did what they had intended—most primary and secondary school teachers were Tunisian rather than French, school attendance drastically increased (DeGorge 2002), and more attention was brought to the distinctive culture and language of the Tunisian people. This, of course, did not occur without considerable investments. From 1980–1990, 27 percent of the state budget was spent on national education.

In 1988, the second transitological moment occurred as the post-Bourguiba imagined community was constructed by Ben Ali after he took office. The »palace coup« that brought the peaceful transition from Bourguiba to Ben Ali, known as *le Changement* (the change), was dominated by *le Pacte National* (the National Pact)—political and economic reforms to encourage foreign investment (Borowiec 1998). In the post-Bourguiba policyscape, we see the rise of three myths (the economic miracle, democratic gradualism, and *laicite*) that shaped educational governance activities, ultimately providing fertile ground for the rise of the post-Ben Ali policyscape. While Ben Ali preserved and expanded the foundational attributes of Bourguiba's educational governance activities to guarantee political stability and security under the »presidential democracy« system, several myths permeated the post-Bourguiba space. Ben Ali wanted to distance himself wherever possible from Bourguiba's educational governance activities, which were founded on Western ideas and the principle of modernization. The three myths mentioned above are central to the ways in which education was projected in the post-Bourguiba period and has its roots in the 1989 education reforms that sought to »reshape [educational] structures according to a rational approach that takes into account the national reality, inspired of success instances worldwide« (MOEHRST 2008, 71) and provided »compulsory and free basic schooling […] redefined the mission and finalities of education, restructured secondary education« (MOET 2002, 10–11). This reform not only sought to respond to the gaps in student performance across the system, but was also Ben Ali's way of suggesting to the international community that not only was Tunisia serious about addressing its educational deficits, but also that Tunisia embraced modernity and democratic governance. However Cavatorta and Haugbølle (2012) suggest that this projection of embracing modernization and educational reforms was a myth. In 2002, Ben Ali engaged upon the second set of reforms in the post-Bourguiba era. Ben Ali's reforms were based on »social liberalism« (Mbougueng 1999), since they adopted aspects of neo-liberal market reforms in conjunction with heavy state intervention in the social sector. In this context, the Educational Reform Act states that

»education aims at cultivating fidelity and loyalty in students to Tunisia« (MOET 2002, 5) while increasing their »capacity for self-education and […] prepar[ing] them for access to the educated community« (MOET 2002, 9). The link between Ben Ali's aim to develop an educated populace while projecting the notion of himself as a democratic leader was the

> Tunisian economic miracle […] [where the leadership sought] to tackle the most pressing problems of the country and then generate sufficient growth to be able to defuse social tensions in order to open up the political system without risking the growth of Islamic extremism (read Islamism), as economic success could be used to undermine the attraction of political Islam. (Cavatorta and Haugbølle 2012, 183).

During the post-Bourguiba era, Ben Ali increased spending on education —6.3 percent of the gross national product in 1993—and focused attention on cultivating competencies, including: (i) practical (mathematics, science, computer science, and technology); (ii) strategic (organize, analyze, and search for correct information); (iii) initiative (spirit of creativity); and (iv) behavioral (senses of responsibility, self-reliance, and cooperation (MOEHRST 2008). There is no clear evidence whether there is a connection to the investment in education, but Tunisia's annual growth rate did increase from 5 to 6 percent between 1996 and 2005. In 2005, another set of educational reforms called for »a large scientific and technological partnership with overseas« (MOEHRST 2008, 155) as part of »Tunisia Tomorrow«—a set of reforms introduced in 2005 that focused on technological partnerships. In light of these reforms, it is ironic that one of the most important reasons for the post-Ben Ali transitology period was high unemployment among young people, especially university graduates, which rose from 30 percent in 2009 to 45 percent in 2011. Distinctive in the development of the post-Bourguiba space is the movement from the process of Tunisification towards liberalization of entry into the global market. For example, while reforms drew on Tunisia's historical past, they also projected a sense of Ben Ali's performance legitimation in that higher education reforms sug-

gest »the university will […] boost the comprehensive process of economic development. It will remain an inexhaustible source of creation and innovation […] So that Tunisia remains forever, the symbol of science, culture and civilization which it has always been throughout history« (15). As part of Ben Ali's projection of democratic values, the post-Bourguiba era continued to promote »absolute equality among the sexes,« which was considered »the best means of social promotion« (MOET 2003, 17). The idea of competing internally and externally permeated the post-Bourguiba space, as education was expected to generate a »link between training and the labour market at the regional and national level« (MOET 2008, 19).

Conclusion: Educational contagion

In examining the role of educational developments in post-spaces, we suggest that several small internal shocks to Tunisia's educational system were driven by political fluctuations and transformations. These ultimately led to the tsunami of policy solutions that have altered the Tunisian landscape, giving rise to education contagion—the spreading of ideas due to spillovers. In essence, one conceivable supposition is that educational contagion is a byproduct of the educational governance activities that are utilized during different transitological moments.

In focusing on the evolutionary dynamics of governance activities, transitological moments within transitologies, we suggest that future research should now be able to identify how activities eventually spilled over as transitological periods expanded. Essentially, while the post-protectorate policyscape cemented governance activities under the state apparatus to achieve modernization in the post-Bourguiba policyscape, *le Changement* was utilized to consolidate crucial decisions under the »presidential system« in the post-Ben Ali policyscape, which continues to be an extension of earlier scales of governance activities. Thus educational contagion, or the spillover effects, ultimately cemented the seeds of the Tunisian Uprising, or »Jasmine Revolution« as coined by the Western media, and the ensuing Arab Spring. Based on our analysis, we suggest that the Tunisian Uprising not only went against the dictatorship *per se,*

but also against the policyscapes that different governance activities had created, expanded, and maintained over time. After all, it was the centralized bureaucratic system that funded, provided, owned, and regulated the independent activities of education, and it was the products of the system, its human capital, that rose up against the state apparatus when they could not find employment. While we recognize that several factors contributed to the demise of the Ben Ali regime after 23 years of governance, we advance that educational contagion ultimately shaped the pre-revolutionary events and the extent to which they spilled over, given that 43.7% of the population were aged 15–39 and were products of post-protectorate governance activities. An example of educational contagion can be seen in the evolution of political slogans as the uprisings progressed from an initial call for »employment is a right, oh gang of thieves« and »bread and water, not Trabulsis[3]« to calls that »the people want to bring down the regime« (Sadiqi 2011, 21). Other slogans, such as »the people want to topple the regime,« invoked aspects of the work of the Tunisian poet Abu al-Qasim al-Shabbi, who died in 1933 at age 25. In returning briefly to the situatedness or embeddedness of transversal comparisons, a second example illustrates how, as the state cemented control of the various educational governance activities in the post-Bourguiba policyscape, endogenous actors were used to protect and legitimize this space. It is within the context that the *mukhabarat* became the disciplinary arm of the neo-corporatist security state that arose in the post-Bourguiba policyscape. The *mukhabarat* had its hands in all educational governance activities, since it infiltrated all spheres of Tunisian society as Ben Ali consolidated his presidential democracy. At its height, there were close to a 130,000 *mukhabarat* employed to protect the security of the state, with the university system having its own heavy-handed *mukhabarat* division, which functioned in an atmosphere of impunity and maintained an air of fear to keep university students and officials in line.

3 Refers collectively to the family members of Leïla Ben Ali, second wife of President Zine El Abidine Ben Al.

In putting forth educational contagion as a theoretical module with which to understand the multi-scalarity and multi-spatiality that exists in post-authoritarian spaces, we trace the metamorphoses of educational policies within Tunisia's authoritarian space to examine the conceptualization and actualizations of empirical research on education. The post-Ben Ali periods have begun with destroying and discrediting the historical, social, and professional past (Cowen 2002). In this paper we have made two observations: (i) we have advanced a way of studying post-spaces in the hope that we can better understand the type of transitological processes that states go through as different educational systems are restructured after the collapse of a regime and (ii) we have suggested that in the case of Tunisia, the transitological process has given rise to educational contagion at different policyscales. In the post-space, projected globality is not embedded in the governances negotiated, but instead stems from educational contagion. In essence, over time these various projections have occurred in small shocks that now shape Tunisian society within the post-space.

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Educational policies for non-Russian minorities in Russia

A theoretical-historical case study

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The subject of this article has in recent years become a focal topic of discussion in most European countries: the educational policy of (nation-)states towards sociocultural minorities, both immigrant and indigenous. In the present article, this issue is studied using the example of Russia's educational policy for minorities throughout history, from the beginnings of the Russian state until the dissolution of the Soviet Union.

Since its formation, Russia has been a multi-ethnic state and, as a consequence, has had extensive experience with linguistic and cultural diversity in education. Nonetheless, the educational policies of the Russian state for non-Russian minorities have found comparatively little attention in educational research (e.g., Mitter 1972; Mchitarjan 2011). In addition, the focus of the existing research is descriptive, that is, its aim is the *historical reconstruction* of Russian minority education policies. By contrast, the aim of the present study is to improve the *theoretical understanding* of Russian educational policies for non-Russian minorities. Hence this article is a contribution to the study of the history of education from the perspective of historical sociology: the analysis of history from the perspective of sociological theory (Calhoun 2003). Specifically, Russian educational policy for ethnic minorities is analyzed from the perspective of a theory of cultural transmission in minorities recently proposed by the author (see in particular Mchitarjan and Reisenzein 2010; 2013; 2014a). My aim is to show that, using the example of Russian educational policies for minorities: (1) the theory of cultural transmission in minorities is able to

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explain not only the educational policies of a majority society for immigrants (the focus of previous applications of the theory), but also important aspects of the educational policy of a majority for indigenous minorities; and (2) the theory therefore affords a better understanding of Russian educational policies towards indigenous minorities.

In part 1 of the article, Russia's policies for non-Russian minorities are reviewed from the beginning of the Russian state until the dissolution of the Soviet Union.[1] Coverage of this broad time span is essential to make visible both historical continuities as well as changes in Russia's educational policies for minorities. In part 2, the theory of cultural transmission in minorities is summarized and applied to Russian educational policies for minorities. Part 3 summarizes the main results of the analysis.

Russia's educational policies for non-Russian minorities

Russian national education policy before 1917

Since its formation in the 9th to 14th century, the Russian state has been home to multiple ethnic groups, including Slavic, Finnish, Baltic, and Turk peoples. The ethnic, linguistic, cultural, and religious diversity of the population increased during the following centuries. Three main factors were responsible for this increase: (a) the discovery or develop-

1 Because of the large time span covered in this article, the reconstruction of historical events is necessarily based in part on the secondary literature (e.g., Kappeler 2008). Reliance on secondary literature is generally considered legitimate in historiography if verifiable facts rather than evaluations possibly biased by ideological preconceptions are reported and if the historical events in question are described similarly by different historians, preferably scholars stemming from different countries, historical epochs, and scientific traditions. I have tried as much as possible to adhere to these criteria in my use of secondary sources; a few remaining historical controversies are pointed out. For a discussion of bias in nationalist Russian, as well as in Soviet and post-Soviet historiography, see Aymermakher and Bordyugov (1999); Alishev (1990); Gerasimov et al. (2004); and Sanders (1999).

ment of new areas and the accession of foreign elites and their peoples to the Russian crown; (b) the military conquest of new territories; and (c) the decision of individual states and principalities—more or less voluntary or forced by circumstances such as the need to protect themselves against dangerous neighbors[2]—to join the Russian Empire (Abdulatipov 2000; Baberowski 1999; Dyakin 1998; Kappeler 2008; Raeff 1971; Sarkisyanz 1961; Starr 1978; Sunderland 2006; Thaden 1984). As a result of these developments, at the end of the 19th century the Russian empire spanned an area of 22 million square kilometers with a population of approximately 125 million comprising more than 200 different nations and ethnic groups (Abdulatipov 2000, 114; Kappeler 2008, 342).

Regarding the policy of the Russian state towards non-Russian minorities, two main strategies can be distinguished following Kappeler (2008) and in agreement with numerous other authors (e.g., Baberowski 1999; Becker 2000; Dolbilov and Miller 2006; Hosking 1997; Khodarkovsky 2002; Miller 2000; Suny 2001; Sarkisyanz 1961; Starr 1978; Steffens 1992; Sunderland 2003; Vulpius 2007): (a) the strategy of »flexible pragmatism and tolerance«, and (b) the strategy of »aggressive state nationalism.«[3] Both strategies already existed before the October Revolution of 1917, and—as will be argued below—both were taken up again in modified

2 The question of the degree to which these decisions to join the Russian empire were voluntary is discussed controversially in modern historiography (see Dyakin 1998, 14, 18; Dolbilov and Miller 2006, 35; Kappeler 2000, 17; Kappeler 2008, 58, 146).

3 Kappeler's book *The Russian Empire: A Multi-Ethnic History* (2008; first edition 1992) is, according to the dominant opinion of experts in the field, the most comprehensive study of nationalities policy in Russia in international historiography (see e.g., Krupnikov 1994; Singhofen 2006; Vulpius 2007; as well as Gerasimov et al. 2004, 19–20). A number of criticisms have been raised against Kappeler's analysis, the most important being that (a) counter to his own aspirations, his history of Russia remains ethnocentric; and (b) he did not sufficiently consider the »imperial perspective« (e.g., Gerasimov et al. 2004, 20; Vulpius 2007, paragraphs 6 and 7). However, these criticisms do not affect Kappeler's thesis about the two main strategies of Russian minority policy.

form after 1917. However, the strategy of flexible pragmatism and tolerance has a much longer tradition. It was characteristic for the nationalities policy of the pre-modern Russian state and continued—with the exception of the reign of Peter the Great and partially that of Catharine II—until the second half of the 19th century. This strategy, based on the cooperation of the Tsar dynasty with loyal elites of the respective minority groups, consisted essentially in guaranteeing the status quo, i.e., non-interference of the Russian state in the socio-political and economic practices or value systems, often influenced by religion, of non-Russian ethnic groups (Kappeler 2008, 33, 70–101).

Until the middle of the 19th century, excepting the periods mentioned above, the Russian government tolerated the non-Orthodox religions of its citizens: Lutheranism in the Baltic Provinces and Finland, Catholicism in Poland and Lithuania, Islam practiced by Tatars and Bashkirs, and Lamaism by Buryats and Kalmyks. Similarly, until the middle of the 19th century, the Russian government generally accepted the use of non-Russian languages in administrations and in schools, such as German in the Baltic governorates, Swedish in Finland, Romanian in Bessarabia, and Polish in Lithuania, the Ukraine and in the western as well as (with some exceptions) the eastern part of Belarus. As consequence of this liberal language policy, at the beginning of the 19th century there were Russian schools for higher education in which up to seven foreign languages were taught, but not Russian; in four of the then existing eight universities of Russia, the language of instruction was not Russian but Polish, Swedish or German; and most non-Russian ethnic groups (e.g., in Poland, Finland, Siberia, the Volga region, and the Caucasus) conducted school instruction in their native languages (Kappeler 2008, 101–3.; see also Baberowski 1999, 199; Miller 2000, 227; Sunderland 2003, 102; Vulpius 2007, paragraphs 21, 24).[4]

4 In some areas of the Russian empire, school lessons were not taught in the language of the indigenous minority, but in the language of the local national elite. For example, in the Baltic governorates, the language of instruction was frequently German rather than Estonian, Latvian or

The strategy of »aggressive state nationalism« (Kappeler 2008) towards ethnic minorities emerged in full-blown form only in the 19th century, in the context of the spread of the idea of »nation«. This strategy was fostered by the Polish national uprisings of 1830/1831 and 1863, which were perceived as a threat to the stability of the Russian empire. After these historical events, the Russian state tried to limit the dominance of the Polish and German cultures in the western regions of the empire and in the Baltic governorates by prescribing the use of the Russian language in the classroom (see Rozhdestvenskiy 1902; also Dyakin 1998; Kappeler 2008). Subsequently, beginning in the late 1860s, a phase of massive Russification set in, primarily in the western provinces. According to the »Regulation for primary schools in the provinces of Kiev, Podol'sk and Volynsk« (1869), all lessons in all subjects in these provinces were now to be taught in Russian (see Rozhdestvenskiy 1902, 582–87). In the 1870s–1890s, these laws were extended to German-language schools in the Baltic governorates and to Polish-language schools in the »Vistula country« (the Kingdom of Poland) (Rozhdestvenskiy 1902, 592, 685, 689). From then on, other mother tongues were permitted only as a teaching aid in elementary school. As of 1892, it was forbidden to found schools in minority languages and even tutoring in the mother tongue outside school hours was forbidden in the northern and south-western provinces upon threat of fines and even prison (see the »Provisional regulations concerning penalties for illegal instruction in the northern and south-western provinces« in Rozhdestvenskiy 1902, 690; Aref'yev 2012, 24).

However, even in the last third of the 19th century, Russian educational policy for non-Russian minorities was not uniform: The hardline approach described above was taken primarily towards non-Russian minorities in the western provinces, whereas other minorities met with much more understanding. A »cautious approach« was in particular

Lithuanian; in the western provinces, it was Polish instead of Ukrainian or Belarusian, and in the Grand Duchy of Finland it was Swedish and not Finnish (Kappeler 2008, 101–3).

advocated towards Muslims (see »O merakh« 1871, 1561–62, 1564; Rozhdestvenskiy 1902, 592–94). For this group, as well as for other non-Christian and Christianized »aliens« (*inorodtsy*),[5] the Ministry of Education issued a separate education law in 1870. These »Measures for the education of indigenous aliens in Russia« (»O merakh« 1871), dating from March 26, 1870, laid down the guidelines of educational policy for so-called Christians from other ethnicities (i.e., Christianized non-Russians) on the one hand and so-called Tartaric Muslims (i.e. non-Russian Muslims) as well as other non-Christian ethnic groups on the other hand.[6] The »Measures« named the following three basic principles: (a) instruction at elementary schools are to be held in the native language of the pupils; (b) teachers in non-Russian schools should be members of the local population with a good knowledge of Russian or people of Russian descent with knowledge of the local language; and (c) particular attention should be paid to the education of women (see »O merakh« 1871, 1558–66). Despite these seemingly liberal principles, the declared aim of the »Measures« was the gradual »Russification [of the ethnic minorities] and their final merger with the Russian people« (session diary of the Council of the Ministry of Education in Bendrikov 1960, 62–64; see also, »O merakh« 1871, 1557–58, 1561–62; Rozhdestvenskiy 1902, 592).

5 The term *inorodtsy* (literally: »individuals of different descent«) was used in Tsarist Russia at the end of the 19th century to denote primarily Siberian and Central Asian minorities (Martiny 1992, 1756)—ethnic groups whose social structures and ways of life differed significantly from the Russian model. In the course of time, the concept was increasingly used to denote all non-Russian ethnic and national minorities (Slocum 1998).

6 Initially, the »Measures« of 1870 addressed the non-Russian minorities of the Volga region (the school district of Kazan') and the Crimea (the school district of Odessa). In the following years, the educational guidelines specified in the »Measures« were extended to the school districts of Orenburg, West Siberia, the Caucasus, the governorates Irkutsk and Primorsk, and the district of Turkestan (see »Regulations concerning primary schools for aliens« 1907, reprinted in Anastasiyev 1910, 134).

The aim of this law becomes more clearly visible if one looks at the details of the organization of schooling for different »indigenous aliens.« The »Measures« specified that schools for ethnic minorities in Russia should take three different forms depending on the minorities' level of knowledge of the Russian language or their degree of Russification: (1) For »slightly Russified peoples« (»O merakh« 1871, 1558) education should start in the children's mother tongue, with Russian playing an increasingly larger role with increasing proficiency in the language. (2) For »partially Russified« peoples in areas with mixed Russian and non-Russian populations, common schools for Russian and non-Russian children were to be established in which lessons were to be taught in Russian from the beginning and the mother tongue allowed only for additional explanation. (3) Finally, for »sufficiently Russified peoples« (»O merakh« 1871, 1560, see also 1563–64) school lessons were to be taught exclusively in Russian and in accordance with the general school regulations (»O merakh« 1871, 1558–60, 1562–64).

To implement the planned school reform among the Muslim minorities (members of the »slightly Russified peoples« group), the educational act of 1870 specified three main measures. First, new state schools were to be founded. Second, Russian classes were to be established in traditional Muslim institutions of elementary and higher education (the maktabs and madrassas): New maktabs and madrassas could only be formed on the condition that teachers of Russian classes were employed, and Muslim communities were encouraged to install Russian classes in their existing schools. Third, both kinds of schools were to organize state-financed education for girls (»O merakh« 1871, 1562–64).

To encourage attendance of Muslim children at the new state-owned elementary schools, preparatory classes in Russian were to be offered »according to needs and possibilities«, and pupils were exempted from attending instruction in Church Slavonic, as well as, in the secondary and higher schools, in Greek and German (»O merakh« 1871, 1562–63). Furthermore, to reduce the »distrust […] against this [new] school spirit« (»O merakh« 1871, 1564; see also 1561–62), the government accorded

Muslim communities the right to organize, at their own expense, Islamic instruction for their children at the state schools and invited them to nominate trustees to supervise these schools. Likewise, the headmasters and teachers of the maktabs and madrassas were allowed to sit in on the Russian classes at any time (»O merakh« 1871, 1562, 1564).

The »Measures« of 1870 were based on the concept of »education for aliens« developed by Nikolay Il'minskiy (1822–91), a professor of Oriental Studies at the University of Kazan'. Il'minskiys school concept was originally developed for the Orthodox Christian Mission Schools for the non-Christian population of the Volga and Ural regions and had been tested, from 1863 onward, on several non-Russian minorities (the Tatars, Chuvash, Udmurts, and others) (McCarthy 1973; Medynskiy 1938). Instruction at the Il'minskiy schools was given by teachers from the local population in the children's mother tongue; Russian was introduced at a later time. The textbooks were written in the native language of the pupils, but with Cyrillic transcription. To this end, Il'minskiy developed Cyrillic alphabets for previously unwritten languages such as Chuvash, Yakut, and Wotyak (Bendrikov 1960, 89–90).

The subsequent educational laws for minorities in pre-revolutionary Russia—the »Regulations for the elementary schools of aliens« (*Pravila o nachal'nykh uchilishchakh dlya inorodtsev*), issued in 1907 and 1913, respectively—were largely written in the spirit of the 1870 »Measures« (»Regulations« 1907 and 1913 in Voskresenskiy 1913, 22–23, 133–35; and »Regulations« 1907 in Anastasiyev 1910, 130–134).[7] Despite some concessions to ethnic minorities, with these laws the Russian state continued to pursue the gradual assimilation of »alien« minorities. This conclusion is supported both by the official goal of Russian educational politics at the time—»the spread of the Russian language and the

7 In the »Regulations« of 1907 and 1913, the distinction between Christianized non-Russians, and those of Muslim faith and other non-Christians was abandoned. According to these laws, only the level of Russian language knowledge was important for the organization of schooling for the children of the non-Russian ethnic groups.

rapprochement [of ethnic minorities] with the Russian people on the basis of love for the common fatherland« (ibid.)—and by the prescribed curriculum of the schools for ethnic minorities, in which twice as many hours were slated for Russian as for the children's mother tongue.

The national education policy of the Russian state after 1917

Compared to the pre-socialist era in Russia, educational policy for non-Russian minorities changed significantly, and in many ways fundamentally, in the Soviet Union. Yet on closer inspection, it is possible to discern parallels to Russian educational policies for non-Russian minorities in the time before 1917: In certain respects, Soviet Russia returned to the strategy of »flexible pragmatism« characteristic for pre-nineteenth century Russia (see also Kappeler 2008, 302).

One of the first and most important documents issued by the Soviet government for the regulation of national relations was the November 1917 »Declaration of the rights of the peoples of Russia« (*Deklaratsiya prav narodov Rossii*). As the basic principle of the new national minority policy, this law proclaimed the »equality and sovereignty of the peoples of Russia« (»Deklaratsiya« 1917). In agreement with this principle, in 1918 the Soviet Ministry of Education proscribed that teaching in the schools and universities of national minorities was from now on to be conducted in the mother tongue of the pupils or students (»O shkolakh natsional'nykh men'shinstv«; reprinted in Abakumov et al. 1974, 145). These two principles of minority (education) policy—the equality of all citizens irrespective of their national origin and the right to education in the mother tongue—were later incorporated into both the 1936 (Article 121) and 1977 (Articles 34, 36, 45) (»Konstitutsiya SSSR« 1936 and 1977) USSR constitutions.

To implement the right of non-Russian-speaking minorities to education in their mother tongue, the network of schools in the affected areas had to be extended, sufficient numbers of teachers had to be recruited from local communities, and textbooks had to be written in the minority languages. Because some non-Russian minorities did not have their own

written language at the time, Soviet linguists were assigned the task of developing alphabets. As a consequence, new alphabets were devised for about 50 ethnic groups (Aref'yev 2012, 36; Kappeler 2008, 304). In addition, the Arabic script, in widespread use among the Turk peoples, was replaced by the Latin alphabet in 1925 and by the Cyrillic alphabet about 10 years later, to facilitate learning of the Russian language (Frings 2007; Aref'yev 2012, 36–37). Hence, with respect to these minorities, Soviet education policy effectively returned to Il'minskiy's 1863 school concept, which likewise proposed, for non-Russian minorities, education in the mother tongue on the basis of the Cyrillic alphabet.

In the first twenty years after the October Revolution, native schools for non-Russian minorities were established across the entire Soviet Union. In 1927, 90 percent of pupils in Belarus, 94 percent in Kyrgyzstan, and almost 96 percent of Tatar pupils visited native language primary schools (Kappeler 2008, 304). In the Ukraine, the corresponding percentage was 78% (Aref'yev 2012, 35). In 1935, school lessons were taught in 80 different languages in the Russian Federation, in 22 different languages in the Republic of Uzbekistan, and in 12 languages in Dagestan (Kappeler 2008, 304). The peak of language diversity in Soviet schools was reached in 1932, when instruction was given in 104 different languages (Aref'yev 2012, 36).

Similar to pre-1917 Russia, and also similar to other comparable historical and contemporary cases (Mchitarjan 2006, 2009; see also Baberowski 1999; Kymlicka 2005), tangible domestic and foreign policy interests stood behind the Soviet state's liberal minority and language policy (e.g. Kappeler 2008, 305). After the socio-political upheavals of the revolutionary years, the new regime wanted to secure the stability of the multi-ethnic state, to end discrimination against non-Russians, and—in light of the upcoming world revolution—to set an example for other countries in dealing with minorities.

However, only twenty years after the October Revolution, the course that had been set for minority education policy was corrected.[8] In 1938, the Central Committee of the Communist Party and the Council of People's Commissars of the USSR decided to introduce Russian as a compulsory subject in the second year of all non-Russian schools (Aref'yev 2012, 36; Frings 2007, 378; Konstantinov, Medynskiy, and Shabayeva 1982, 373–74; Nolte and Schramm 1992, 1647). As reported above, comparable laws—the gradual introduction of Russian as a subject, but also as the language of instruction in minority schools—had been issued in the late 19th century by the Tsarist government (e.g. in 1870, 1907 and 1913). Thus, 1938 marked a partial return to 19th century educational policy for non-Russian minorities. This time, however, the objective was different: Now the main goal was to unite the peoples of the Soviet Union around the political and ideological idea of a socialist state, and to strengthen their ties to this state by means of a common language (see also Frings 2007, 379; Mitter 1972, 43–44).

The resulting increase in the dominance of the Russian language in the Soviet Union was further strengthened by another educational reform that took place in 1958. As part of this reform, parents were allowed to choose between their native tongue or Russian as the language of instruction to »protect [their children] against an overload in language teaching« (Ob ukreplenii svyazi shkoly s zhizn'yu i o dal'neyshem razvitii sistemy Narodnogo Obrazovaniya v strane,« 1958 reprinted in Abakumov et al. 1974, 51). In fact, by then students in the national minority schools of the Soviet Union were learning at least three languages: their native language, Russian, and a second foreign language. The possibility of choosing the language of instruction may have reduced »overload in language teaching,« but it also facilitated the conversion of non-Russian-speaking schools into Russian schools with additional

8 It could be argued that this correction was already anticipated by the earlier replacement of Arabic script by the Latin and later the Cyrillic alphabet.

instruction in the mother tongue. In these schools, the native language was only one subject among many.

In the following 20 years (1960–1980), the Central Committee of the Communist Party and the Council of Ministers of the USSR issued four additional resolutions that further extended the use of the Russian language in national schools (Aref'yev 2012, 37). As a result, at the end of the 1970s, the number of languages in which pupils could acquire a secondary school level certificate—the qualification for university—was reduced to 14 (Aref'yev 2012, 38). Accordingly, the percentage of Soviet pupils who had Russian as their language of instruction increased continuously in the following years, climbing to 68% in 1989/1990. In the national Soviet republics (with the exception of the RSFSR), about 43% of all pupils received instruction in the Russian language at that time (Aref'yev 2012, 38).

This »national turnaround« of Soviet educational policy is less surprising than it may at first seem—given the basic principles of minority politics proclaimed in 1917—if one considers that, even before the October Revolution, the Bolsheviks under Lenin's leadership were critical of the concept of »national-cultural autonomy« (*nacional'no-kul'turnoj avtonomii*). Although the Bolsheviks advocated the right of peoples to self-determination, they clearly put this right behind the political interests of the working class. As a consequence, the idea of internationalism and the international solidarity of the working class was, from the beginning, put before the idea of the nation (see Lenin 1913, 314–22). In line with this, the Soviet rulers attempted to develop, despite their official commitment to cultural diversity, a new super-ethnic and super-national group identity around which individuals in the Soviet Union with different cultural backgrounds could unite. This new group identity was provided by the by ideology of socialism, and was the concept of the »Soviet people.«

In the 1970s, Lenin's vision of a new socialist society seemed to have become a reality. At the XXIV Congress of the CPSU in 1971, it was announced that in the decades after the October Revolution, a »new historical community […] of all classes and social groups, nations and

nationalities« had emerged on the basis of Marxist-Leninist ideology, the »Soviet people« (*sovetskii narod*) (»XXIV s"ezd Kommunisticheskoy partii Sovetskogo Soyuza« 1971, 101). And Russian was chosen as the common language of communication of the Soviet people (Kim and Sherstobitov 1972, 14–15).[9]

Russian national education policy: Interim summary and two research questions

Considered from the perspective of theoretical sociology, the educational policy of a state towards (indigenous as well as immigrant) minorities—in the present case, the policies of the Russian state for non-Russian minorities—raises two questions in particular:

Question 1: What are the *superordinate goals* a majority society (represented by the state) pursues with its educational policies for minorities? As reported in the first part of this article, the official guidelines of Russian educational policies towards non-Russian minorities varied greatly at different times, ranging from Russification of ethnic minorities, to non-interference in the cultural systems of non-Russian peoples, to the right of every citizen to education in their native language. This raises the question of whether there are any overarching goals behind the diversity of the state's or the majority's minority (education) policies. And if yes, which goals are these?

9 After the dissolution of the Soviet Union in 1991, the use of non-Russian languages in schools increased once again. This occurred primarily because of new laws that encouraged linguistic and cultural diversity in society in general and in the educational system in particular (see »Zakon o yazykakh narodov Rossiyskoy Federatsii« 1991; »Zakon ob obrazovanii« 1992; »Konstitutsiya Rossiyskoy Federatsii« 1993; »Federal'nyy zakon o natsional'no-kul'turnoy avtonomii« 1996; »Kontseptsiya natsional'noy obrazovatel'noy politiki Rossiyskoy Federatsii« 2006). An analysis of post-Soviet educational policy for minorities applying the theory of cultural transmission in minorities must be left to another occasion.

Question 2: The second question concerns the *strategies* used by the majority society to achieve its goals towards minorities. How can one explain that a state (as the representative of the majority) uses very different political strategies for minorities at different times, or even at the same time for different minorities? This question is of particular interest if the first question has a positive answer (as I will argue below).

In the second part of this article, I argue that the theory of cultural transmission in minorities (Mchitarjan and Reisenzein 2010; 2014a) can make an important contribution to answering these questions.

Theoretical analysis of Russia's Minority Education Policy

A theory of cultural transmission in minorities

The explanatory focus of the theory of cultural transmission in minorities proposed by Mchitarjan and Reisenzein (2010; 2014a; 2013; 2014b) is on the interaction between sociocultural majorities and minorities[10] in the area of education; in particular the educational activities of minorities and the educational policies of the majority towards them. The explanation of these social phenomena by the theory targets two connected explanatory levels: the level of the proximate psychological mechanisms that guide the actions of the minority and of the majority, and the level of the historical-cultural development of these mechanisms. Corresponding to these two levels of explanation, the theory comprises two components: (a) an action-theoretical model of minority-majority interactions in the domain of education (broadly understood) and (b) a set of assump-

10 In agreement with a widespread view in contemporary social science, *sociocultural minorities* are defined as *low-power subgroups* of a society that have, or claim, a cultural (ethnic, religious, etc.) identity (see e.g., Polm 1995). (In the extreme case, a minority can therefore even be the quantitative majority, as was the case for the black population in the Apartheid system of South Africa). Note that this definition covers both immigrant and indigenous minorities. The theory of cultural transmission in minorities is relevant for the interaction of majority societies with both kinds of minorities.

tions about the evolution of sociocultural groups that provides an enhanced understanding of the basic goals and strategies of minorities and majorities in cultural transmission situations.

An action-theoretical model of majority-minority interactions. The action-theoretical model of majority-minority interactions[11] starts from the *methodological* assumption that the educational activities of a minority and the policies of the majority towards it can be modeled as an interaction between two individuals.[12] Accordingly, the two groups involved—the minority and the majority—are conceptualized as two social actors who attempt, by and large in a rational fashion, to achieve their goals in the area of education in a given historical situation. Furthermore, again analogous to the case of interaction between individuals, it is assumed that the actions of the minority and the majority, and their success or failure, are determined by three groups of factors (see e. g., Reisenzein

11 Action-theoretical accounts are the dominant theories of motivation in psychology (see e.g., Reisenzein 2006) and a strong paradigm in sociology (e.g., Esser 1999; Lindenberg 1985).

12 This methodological assumption is commonly made in historiography. Although it is a simplification and idealization, systematic considerations and historical examples suggest that it is adequate for the analysis of many cases of minority-majority interactions. First, in many historical cases, minority and majority groups have a high degree of organization and, as a result, actually interact like individual agents (through their representatives). For example, a pedagogical emigrant organization negotiates with a state authority about the founding of a school (Mchitarjan 2006). In other cases, group actions are the result of parallel decisions of many group members reached individually. A possible example is the decision of migrant families to organize language instruction in their mother tongue for their children. In this second case, the term »the group« stands for »most members of the group« or »the typical group member« (see e.g., Tuomela 2000). Note also that the theory of cultural transmission in minorities allows different cultural transmission scenarios to exist side by side on a local level, i.e. the theory allows that the same or different members or subgroups of a minority can be treated differently by different members or subgroups of the majority.

2006): (1) the *motives* or *goals* of the majority and the minority; (2) the *beliefs* of the majority and minority about the attainability of these goals by particular actions; and (3) the *objective conditions* or *situational constraints* that apply to both parties, which are either conducive or obstructive to the success of their actions (knowledge, financial resources, relevant national and international laws and regulations, etc.).

In the theory of cultural transmission in minorities, this general model of group interaction is elaborated by supplementing it with several additional assumptions. The most important of these is the assumption that sociocultural groups have, in addition to their other motives (in particular, the wish to preserve and increase their resources and their power; see Bourdieu 1986), a *culture-transmission motive*: a special appreciation of their culture and the desire to preserve it and transmit it to the next generation.[13] This assumption is supported by historical studies of the cultural transmission of minorities in majority environments (e.g., Feidel-Mertz

13 Note that postulating a culture-transmission motive does not imply a »primordial« nor an »essentialist« view of culture (for discussions, see e.g., Bayar 2009; May 2005; Modood 2007; Smith 1998). In fact, according to the theory of cultural transmission in minorities, culture is »socially constructed« in at least three ways: it is socially transmitted; its core elements (including norms and values, language, and even the culture transmission motive itself) are products of cultural evolution; and it contains, in addition to objectifiable elements such as language and norms, important subjective elements including the group's self-definition. Such a view of culture naturally accommodates intragroup variations in culture and the idea that cultures are not fixed and immutable (see also Modood 2007). All this is compatible with the assumption that once »installed« in the members of a group, cultural systems have powerful effects on behavior (e.g., Sober and Wilson 1998; Richerson and Boyd 2005; see also May 2005). Note also that postulating a culture-transmission motive *in a group* does not imply that (a) this motive is necessarily strong in all group members or that (b) it has the form of an explicit desire to »maintain and disseminate one's culture«; it may also (and perhaps typically does) consist of a plurality of more specific wishes for the preservation and transmission of particular cultural elements (e.g., language or religion).

and Hammel 2004; Hansen and Wenning 2003; Mchitarjan 2006, 2009, 2010) as well as by empirical surveys of migrants (e.g., Berry et al. 2006; Boos-Nünning and Karakaşoğlu 2006; Vedder et al. 2009). Although most of the latter evidence is indirect, Mchitarjan and Reisenzein (2013) recently obtained direct evidence for the existence and effects of the culture-transmission motive.[14]

According to the theory of cultural transmission in minorities, the culture-transmission motive is typically a latent concern of groups that is only activated in special circumstances, in particular if group members perceive a threat to the transmission of their culture. This occurs regularly when a sociocultural group comes into the sphere of influence of a socioculturally different, more powerful group. The activated culture-transmission motive then prompts actions designed to counter the perceived threat to cultural transmission, such as special efforts invested in »cultural education« in the family and activities in the domain of public education (Mchitarjan and Reisenzein 2010, 2014a).

Another central assumption of the theory of cultural transmission in minorities is that the method of cultural transmission chosen by a minority in a given historical situation, and its success or failure, depends to a great extent on the educational policies of the majority. Basically, the majority can support, tolerate, or actively hinder the cultural transmission attempts of the minority. Analogous to the explanation of the educational activities of the minority, it is assumed that the educational policy of the majority towards the minority is determined by (a) the goals

14 Using a sample of Russian and Turkish adolescents and young adults with immigrant background, Mchitarjan and Reisenzein (2013) tested six predictions of the theory of cultural transmission in minorities, all of which were at least partially supported. In particular, the participants expressed a strong appreciation of their culture and the desire to transmit it to the next generation; their culture transmission motive focussed on language and norms and values. It also predicted their readiness to take action against the potential loss of their language or culture in their children, as well as their desire to have the minority language taken into account in public schools.

that the majority hopes to achieve in the concrete historical situation, and (b) its beliefs about the attainability of these goals by means of the available educational policies. Furthermore, it is assumed that the latent motive structure of majorities is fundamentally the same as that of minorities. Nevertheless, there is an important difference: In contrast to the minority, the cultural transmission of the majority is usually safeguarded, and is therefore not one of its currently active concerns. As a consequence, the educational policies of majorities towards minorities are usually motivated by goals other than cultural transmission. In agreement with this prediction, historical case studies suggest, for example, that a key reason for *supporting* the cultural transmission of a minority is the majority's hope to profit, economically or politically, from this support (see e.g., Mchitarjan 2006; cf. also the case of minority education policy in the early Soviet Union described in the first part of this article). However, as explained below, in special circumstances the minority politics of a majority can also be motivated by the culture-transmission motive.

Evolutionary foundations of cultural transmission in minorities. The second component of the theory of cultural transmission in minorities consists of a set of assumptions about the *historical origins* and *functions* of the basic motives and strategies of minorities and majorities in cultural transmission situations. This component of the theory is based on a theory of the cultural evolution of groups proposed by D. S. Wilson (2002; see also, Richerson and Boyd 2005; Sober and Wilson 1998). According to Wilson, certain ideological systems such as »religion« or »culture« form the non-biological heritage of social groups. This heritage has developed in the course of history because it aided the survival and reproduction of groups by allowing them to function as adaptive units. Accordingly, the central approach to the explanation of a social phenomenon by this theory of cultural evolution is the attempt to explain the phenomenon in question as a group-level cultural adaptation.

The theory of cultural transmission in minorities uses this principle to explain, first of all, the *existence* of the postulated culture-transmission

motive: It is assumed that this motive is a product of cultural evolution. The reasoning is as follows: The persistence of sociocultural groups necessarily requires the transmission of their culture to the next generation. Therefore, groups who are more successful in their attempts at cultural transmission than others have—other factors constant—an advantage. As a result, it can be expected that all sociocultural groups have evolved mechanisms that support their cultural reproduction. According to the theory of cultural transmission in minorities, the core of these mechanisms is the culture-transmission motive (Mchitarjan and Reisenzein 2010, 2014a).

In addition to explaining the existence of the culture-transmission motive, the theory of cultural evolution also allows one to explain, to a large extent, the *content* of this motive. The theory predicts that the culture-transmission motive focuses on those elements of culture *in the broad sense of the term* (the totality of socially transmitted information; Richerson and Boyd 2005, 5) that are particularly important for the preservation of culture (Mchitarjan and Reisenzein 2010, 2014a, 2013, 2014b).[15] These cultural elements comprise in particular the values and norms of the group and the ideology that supports them (such as beliefs about a common origin and a shared destiny). These elements constitute the core of the sociocultural identity of groups and they are a (or even *the*) central mechanism that allows them to function as adaptive units. In addition, the elements of a culture particularly important for its survival include group characteristics which are reliable outward signs of cultural identity and thereby make it easier for group members to recognize each other. These characteristics include, importantly, the group's language or sociolect (see Richerson and Boyd 2005; Mchitarjan and Reisenzein 2010, 2013, 2014a). In addition, language is of fundamental importance

15 From an evolutionary perspective, »culture« is defined broadly as »information capable of affecting individuals' behavior that they acquire from other members of their species through teaching, imitation, and other forms of social transmission« (Richerson and Boyd 2005, 5).

for cultural transmission because it constitutes the central channel for the transmission of cultural information.[16]

The evolutionary assumptions of the theory of cultural transmission in minorities also suggest an answer to the question of the possible *functions* (evolutionary benefits) of different educational policies towards minorities used by majorities. To avoid redundancy, these assumptions are described in the next section, in which I attempt to answer the two main questions raised by the Russian educational policy for minorities from the perspective of the theory of cultural transmission described above.

Russian education policies for non-Russian minorities in light of the theory of cultural transmission in minorities

Question 1: What are the superordinate goals a majority (represented by the state) is pursuing with its educational policies for minorities?

The answer to this question suggested by the theory of cultural transmission in minorities can be derived from two central assumptions of the theory. (1) Unlike the minority, the majority's culture transmission is usually safeguarded and is therefore not one of its current concerns. As a consequence, the educational policies of majorities towards minorities are usually motivated by goals other than cultural transmission. (2) Other factors constant, social groups are at an advantage to the degree that they manage to act as adaptive units (Wilson, 2002). Because achieving this aim is a particular challenge in a multi-ethnic state, a primary concern of the majority (represented by the state government) in a multi-ethnic state should be the unification of the different ethnic groups living within its borders into a functional unit. This prediction of the present theory agrees well with Kymlicka's (2005) proposal that the basic problem of multi-ethnic states is to coordinate the different ethnic groups living in

16 Note that the core elements of culture suggested by the evolutionary perspective adopted here agree well with a popular definition of culture proposed by social scientists according to which »culture« denotes a system of socially transmitted norms and values that regulates the behavior of a group (see for example, Maletzke 1996; Thomas 2005).

their territories into a functional whole. This includes mastering communication problems stemming from the use of different languages, solving conflicts between different ethnic groups, negotiating value clashes, and the like. In agreement with Kymlicka, I submit that achieving this aim is the main superordinate goal of the majority's policies towards minorities in multi-ethnic states, as different or even contrasting as they may look.

Accordingly, I propose that the two historically documented, primary strategies of dealing with minorities in Russia—the strategy of »flexible pragmatism and tolerance« and the strategy of »aggressive state nationalism« (Kappeler 2008)—can for the most part be understood as two different strategies for reaching the superordinate goal identified above. Seen from this perspective, the aim of the *pragmatic/tolerant strategy* is to unite the different ethnic groups in a multi-ethnic state by establishing some form of common group identity. In Tsarist Russia, this was achieved by means of loyalty of the non-Russian elites and their peoples toward the Tsar dynasty, and their identification with the Russian Empire as a common home. Similarly but again different, in the Soviet Union, the government tried to gain the loyalty of non-Russian minorities by fostering their identification with the values of the »Soviet people«. In contrast, the strategy of *aggressive state nationalism* is the attempt to solve the coordination problem of the multi-ethnic state by assimilating the ethnic minorities into the dominant culture (»Russification of the ethnic minorities and their ultimate merger with the Russian people«; Bendrikov 1960, 62–63). In this case, the coordination problems caused by cultural differences are overcome by creating cultural homogeneity. As Kymlicka (2005) describes this strategy, »the state […] express[es] the national identity of the dominant national group while attempting to assimilate other national groups or at least relegating them to the private sphere« (39). A key means of achieving this goal is an assimilationist educational policy. In sum, according to the proposed analysis, both of the main educational policies of the Russian state for minorities—tolerance of the minorities versus the attempt to assimilate them—had, despite their opposing directions, the same ultimate goal: to

solve the coordination problem of the multi-ethnic state and thereby to safeguard its stability and efficiency.

However, the theory of cultural transmission in minorities suggests that this analysis is incomplete. A full understanding of majority politics for minorities must also take into account the majority's culture transmission motive as a possible additional motive of, in particular, assimilationist policies. The assimilation of minorities is not only a means of solving the coordination problems of a multi-ethnic state, it is also a means of supporting the maintenance and transmission of the majority culture: The successful assimilation of a sociocultural minority leads to both the numerical increase of the majority and the conversion of its resources into those of the majority (whose ranks minority members join in the process of assimilation), as well as the termination of potential risks (e. g. separationism) posed by the minority (Mchitarjan 2010; Mchitarjan and Reisenzein 2010, 2014a). Hence, historical analyses of the reasons for any concrete case of assimilationist policy should always consider the possibility that it was, at least in part, motivated by the majority's culture-transmission motive.

Beyond that, the majority's culture-transmission wish can in theory also motivate certain (seemingly) tolerant policies for minorities. In particular, the goal of establishing a super-ethnic identity often leads, in practice, to a further strengthening of the dominance of the majority culture. In the case of Russia, this is true in particular of the attempt—in the later Soviet Union—to establish a »Soviet« identity, which in practice led to the increasing dominance of the Russian language and culture. Many representatives of non-Russian minorities therefore considered the state policy of establishing a Soviet identity to be a covert form of Russification (Kymlicka 2005). It is possible, however, that in this case the strengthening of the majority culture was an unintended side-effect rather than a goal of the respective minority policies. Indeed, Kymlicka (2005) suggests that the establishment of a dominant cultural identity often occurs unintentionally.

Question 2: Why does a majority society adopt different educational policies for a given minority at different times, and even at the same time for different minorities?

According to the action-theoretical model of cultural transmission described earlier, the pursuit of different educational minority policies by a majority can be explained by two factors: (a) the perceived advantages and disadvantages of the available educational policies for furthering the superordinate goals of the majority, and (b) their estimated attainability. The action-theoretical model predicts that the majority chooses the strategy that appears, from its perspective, to be most efficient—i.e., the strategy that maximizes the majority's chances of achieving its aims while minimizing costs and negative side-effects.

Both the tolerance and support of a minority's cultural transmission, and the attempt to interfere with it—and in the extreme case, the attempt to assimilate the minority—have benefits and costs. The potential benefits of the assimilation of a minority were already mentioned: the enlargement of the majority group and its resources and the termination of potential problems associated with minorities in a multi-ethnic state. As to the costs, the most important factor is that direct attempts at assimilation—or maximal threats to the minority's culture-transmission motive—usually trigger strong opposition from the minority, including protests, overt or covert resistance, and appeals to third parties (e.g., other countries or international organizations; for historical evidence see e.g., Mchitarjan 2006). These defensive strategies of the minority can make its assimilation too expensive or too difficult. In addition, at least in modern democratic societies, the forced assimilation of minorities is considered ethically unacceptable. Therefore, the attempt to forcefully assimilate a minority also has moral costs for the majority, including ostracism by the international community. Kymlicka (2005) considers these costs and the increasingly effective defenses of minorities against attempts at forced assimilation to be the main reason why such attempts were only rarely successful in 20th century Europe. However, although international condemnation of the forced assimilation of minorities is a

comparatively recent achievement, the history of Russia and other multi-ethnic states suggests that a tendency to morally oppose forced assimilation existed long before the formal international recognition (after the First World War) of the rights of peoples and the protection of minorities. This hypothesis receives deductive support from the theory of cultural transmission in minorities, which suggests that a »natural« moral opposition against forced assimilation should indeed exist, although it is created by cultural rather than biological evolution. The cognitive basis of this moral tendency is the mutual knowledge of sociocultural groups about the existence of the culture-transmission motive. It is difficult to legitimately deny other groups that which one desires for one's own group. Support for this hypothesis can be seen in the fact that the assumption that groups have a desire to transmit their culture has been accepted in international minority law (e. g., Opitz 2007; Thornberry 2001). The existence of a »natural« opposition to forced assimilation can explain why the forced assimilation of minorities has historically always seemed to have required special justification—e. g., that the creation of cultural homogeneity is necessary to ensure the political stability of the state, or that the minority in question is culturally backwards and assimilation therefore in its own best interests (Kymlicka 2005).

Like the attempt to assimilate a minority, the tolerance and support of a minority have both benefits and costs for the majority (see also Mchitarjan and Reisenzein 2010, 2014a). The possible benefits of a tolerant/supportive strategy include the avoidance of the above-mentioned material and moral costs of attempts at assimilation (which often remain unsuccessful), fostering a loyal attitude in the minority, and the provision by the minority of desired goods such as manpower, technical knowledge or the establishment of favorable relations to other countries. The possible costs of a tolerant/supportive strategy include problems arising from intercultural differences (e.g., communication problems, value clashes, separatism) and the expenditure of majority resources to support the minority.

In summary, according to the theory of cultural transmission in minorities, the reasons for different educational policies towards minorities are the different expected costs and benefits of these policies and their different perceived feasibility. Furthermore, when estimating the possible effects of different minority policies, the majority implicitly takes into account the minority's culture-transmission motive and the associated material and moral costs of an assimilative strategy, as well as the associated benefits of a tolerant/supportive educational policy.

Taken together, these assumptions allow the theory of cultural transmission in minorities to explain many details of Russian educational policy towards minorities throughout history, including several that are otherwise difficult to make sense of.[17] This claim will be documented by three examples.

Example 1. The theory of cultural transmission in minorities explains why the attempt to forcefully assimilate minorities has been a comparatively rare occurrence in Russian history and was strongest at the climax of Russian nationalism in the late 19th century. As explained above, the theory suggests that the forced assimilation of a minority typically meets not only with practical resistance, but also with intuitive moral rejection. Therefore, the assimilation of a minority requires special legitimation, such as the claim that the creation of cultural homogeneity is needed to safeguard the political stability of the state, or that the majority culture is superior (Kymlicka 2005). This rhetoric is characteristic of the legitima-

17 In addition, the theory of cultural transmission in minorities answers the more general question of why both the tolerant and intolerant majority policies for minorities focus on systems of norms and values, and language, rather than some other aspect of culture (e.g., technology, eating habits, etc.). The reason is that norms and values, and language, are the core elements of culture. They are central to the identity of sociocultural groups and essential for their functioning as adaptive units. For this reason, they are also the focus of the culture-transmission motive: It is these cultural elements that minorities primarily want to maintain and transmit, and which they are therefore particularly quick to defend.

tion discourse of ethnocentric nationalism. Although nationalism is a comparatively recent historical »invention«, I assume that it has old cultural-evolutionary roots, possibly the most important of which is the culture-transmission motive (see also Nikolas 1999). Why this ideology won the upper hand in late 19th century Russia is beyond the theory of cultural transmission in minorities to explain. However the theory *can* explain why forced assimilation has been a comparatively rare occurrence in Russian history. It is because forced assimilation is in principle an unstable strategy: It requires special justification and it becomes untenable once the defense is no longer accepted.

In the later Soviet Union, the dominance of the Russian majority culture was again fostered by the educational policy of the state. However, at that point in history, this was only possible in the context of a program aimed at establishing a super-ethnic identity.

Example 2. The theory of cultural transmission in minorities explains why, in the era of Russian state nationalism in the 19th century, a hardline assimilationist politics was taken against culturally similar non-Russian minorities (e.g., Poles and Ukrainians), whereas a »cautious« line was adopted towards Muslim and other non-Christian ethnic groups. The theory suggests the following explanation of these historical facts: The Russian assimilationist policy was based on the implicit assumption that resistance to assimilation increases with the cultural distance between majority and minority. Accordingly, it was expected that minorities whose core culture—the (religiously impregnated) value and norm systems and in some cases (e.g., in Poland and the Ukraine) also the language—are similar to the Russian culture would show comparatively little resistance to Russification and for that reason, the chances of success of a concerted assimilation attempt would be good. By contrast, the Muslims and other non-Christian minorities were expected—because of their perceived greater distance to the Russian culture—to show strong resistance to a direct assimilation attempt, making its costs high and its chances of success uncertain. Therefore, a more gradual approach that did not strongly threaten the minority's culture-transmission motive

was preferred in this case. Hence, a »cautious approach« was taken towards Muslims (and more generally non-Christians) not because they were not to be Russified, but because stronger opposition against a direct assimilation attempt was expected.

This interpretation is supported by the following historical facts: (1) The assimilation of the non-Christian minorities was the declared long-term goal of the »Measures« of 1870 (»O merakh« 1871, 1561–62; cf. 1555–56). (2) A previous forced assimilation attempt under Peter the Great (that included banning the native language in schools) did not have the desired effect and had raised strong protests (Medynskiy 1938, 350). (3) Il'minskiy, whose school concept for ethnic minorities formed the basis of the »Measures« of 1870, was himself a fervent nationalist and was convinced that his »cautious« educational policy would in the long run result in the replacement of the native cultures by the Russian culture (McCarthy 1973). Il'minskiy (cited in Medynskiy 1938, 352) argued that using the mother tongue as the language of instruction in schools for ethnic minorities would be the best way to teach them the Russian language and culture. (4) According to the »Measures« of 1870, different non-Christian minorities were to be provided with different forms of schooling finely attuned to the degree of their Russification: The less an ethnic group was already Russified, the more space the mother tongue of this group was given in the classroom, and the later the learning of the Russian language began. (5) Several of the measures proposed for the schooling of Muslims, such as allowing the headmasters and teachers of the maktabs and madrassas to sit in on Russian classes at any time, were explicitly aimed at reducing the expected »distrust against the new school spirit« and more specifically »the fear that the government attempts to dissuade the children from their religious faith« (»O merakh« 1871, 1561–62).

Example 3. The theory of cultural transmission in minorities can also make sense of Russian educational administrators' recommendation, made in the assimilationist phase and mentioned in the first part of this article, to give special attention to the education of girls and women in

areas with Muslim and other non-Christian populations. For successful cultural transmission, certain members of a culture are of particular importance (Mchitarjan and Reisenzein 2010, 2014a). These key agents of cultural transmission include the religious and political leaders of sociocultural groups, as well as members of certain professions (e.g., teachers) who are considered to be experts for cultural transmission. The group of »cultural transmission experts« also includes women, because—especially in pre-modern societies and in societies with a missing or only weakly-developed system of public education—the education of children usually falls upon women. Hence, if a majority plans to assimilate a minority, it is well advised to focus on the »cultural conversion« of leaders and other key agents of cultural transmission, such as women. In this way, the transmission of the minority culture is diverted at a crucial point. The Russian educational politicians of the late 19th century were apparently aware of these points, as witnessed by the justification they gave for their recommendation: »It is the mothers who mainly preserve the language and traditions of ethnic minorities« (»O merakh« 1871, 1558, see also 1559–60, 1564).

Summary

Historians often restrict their efforts to reconstructing events from the past, with a minimum of theoretical interpretation and explanation. In contrast, the focus of the present article was explanatory. My aim was to analyze Russian educational policy for non-Russian minorities throughout history from the perspective of the theory of cultural transmission in minorities (Mchitarjan and Reisenzein 2010, 2014a), a theory that was explicitly formulated to explain minority-majority interactions in the domains of education and cultural transmission. This attempt was premised on the belief that the explanation of historical events by general theories (or at least »middle-range« theories; Merton 1968) is both feasible and desirable (see also Calhoun 2003). Specifically, using the case of Russian educational policies for minorities, the theory of cultural transmission in minorities was probed for answers to two main questions raised by the educational policy of a majority for a minority: (1) What

were the superordinate goals pursued by the Russian state with its educational policy for ethnic minorities? and (2) Why were very different educational strategies used at different times, and even at the same time for different minorities? The results of my analysis indicate that the theory of cultural transmission in minorities can give at least partial answer to both questions.

Regarding the *superordinate goals* of the Russian educational policy for minorities, I argued that the two main historical strategies for dealing with minorities in Russia—the strategy of »flexible pragmatism and tolerance« and the strategy of »aggressive state nationalism«—are both motivated by the common goal of solving the basic problem of multi-ethnic states: to coordinate different ethnic groups to form a functional whole (see also Kymlicka 2005). In addition, I argued that the educational policy of the majority can also be influenced by the majority's culture-transmission motive. In particular, this motive can be an additional reason for the majority's pursuit of an assimilationist strategy. Beyond that, even some forms of »tolerant« educational minority policies—in particular the attempt to establish a super-ethnic identity on the basis of the majority culture and language—can be partly motivated by the culture-transmission motive of the majority, or can at least have the unintended side-effect of strengthening the majority culture.

The second question—why, given the described common superordinate goal, the Russian state used very different policies for minorities in different historical periods, and even at the same time for different minorities—can be answered by pointing to the expected utility of the different strategies for reaching the majority's goals, as well as their perceived feasibility. For example, the attempt to assimilate a minority has, if successful, a variety of benefits for the majority, but it usually triggers strong defense mechanisms within the minority and is considered inadmissible in modern democracies. Furthermore, I argued that even in pre-modern societies, there is a »natural« moral opposition to forced assimilation, which is based on the mutual knowledge of groups about their culture-transmission motive. The strategy of forced assimilation

therefore always needs special legitimation. Such a legitimation was in particular provided by the ideology of ethnocentric state nationalism that set the tone in late 19th century Russia. In the Soviet Union, this legitimation was no longer viable. Instead, there was an initial return to a minority-friendly educational policy. In the later Soviet Union, the dominance of the Russian majority culture was again promoted through educational policies, but at that time in history this was only possible in the context of the aim of establishing a super-ethnic identity (the »Soviet people«).

Differing perceived costs and chances of success can also explain why the Russian government took a hardline assimilationist approach towards culturally close minorities in the era of 19th century state nationalism, whereas culturally more distant ethnic groups were handled more cautiously. The explanation suggested by the theory of cultural transmission in minorities is that a stronger defense against direct assimilation attempts was anticipated from the culturally distant ethnic groups, and a more gradual assimilation strategy was considered to be more promising. Other details of Russian educational policy towards minorities also become understandable in light of the theory of cultural transmission in minorities. For example, the recommendation of Russian educational experts during the assimilationist phase in the late 19th century that special attention be paid to the education of the girls and women from Muslim and other »alien« minorities can be explained by noting that the »cultural conversion« of women, particularly in traditional societies, disturbs the cultural transmission of minorities at a crucial point.

In conclusion, both the central tenets as well as many details of Russian educational policies for minorities can be explained by the theory of cultural transmission in minorities. This conclusion supports the thesis of Mchitarjan and Reisenzein (2010, 2014a) that the theory is not only useful for explaining interactions between a majority society and immigrants, but also those between the majority and indigenous minorities. At the same time, the results of the present historical, theoretical case study

provide a better understanding of the case at hand, Russian educational policy for minorities.[18]

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Education in Udmurt and Chuvash as minority languages of Russia

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Introduction

Addressing the issue of bi- and multilingual education in today's Russia, the goal of the article is to demonstrate what has changed in education for minority language speakers during more than twenty years of post-socialist development. Russia has signed, but not ratified, the European Charter for Regional or Minority Languages. As Russia or the Russian Federation (RF) is a multilingual country, the authorities have promised to develop all indigenous languages of the RF and follow the legislation created for linguistically diverse regions of the world. But in reality, minority languages are considered a danger to the native speakers of these languages and as a possible threat to Russian language competencies (Leksin 2014).

Our aim is to give an overview of Russian language policy in education, to demonstrate current tendencies in the attitudes of Russian authorities toward minority language teaching, and to compare them with the attitudes of the ordinary people involved in the educational system as its agents or clients. At the same time, in the two case studies we present, we claim that some measures are being undertaken to help teach languages to pre-school (in Udmurtia) and school age (in Chuvashia) children. The article introduces, summarizes and discusses the situation of Udmurt and Chuvash in education on the basis of legal texts, statistical data, interviews with teachers and school officials, and polls of parents and schoolchildren.

The Volga region was chosen for of its longstanding multilingualism. Speakers of the Finno-Ugric, Turkic, and Slavic languages have been liv-

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ing in immediate neighborhood for centuries and their languages have long undergone mutual influences (Nuorluoto 2007). In the 20th century, these contacts intensified, the Russian language became more or less the donor, and other languages turned into recipients (Taagepera 1999); the influences of local languages on Russian, besides exoticisms, remain almost unstudied. The Volga Federal District comprises 14 of Russia's »federal subjects« (constituent entities), including six republics—three with Finno-Ugric »state languages,« and three with Turkic languages (in all cases alongside Russian, which dominates in administration, media, and public life).

In spite of many similarities, the six republics of the Volga Federal District are quite different in terms of geography, ethnic constitution, economic strength, and other respects. Udmurtia and Chuvashia have important differences which made them attractive case studies for the region. Udmurtia has some 1.5 million inhabitants. 28% are ethnic Udmurts and 62% ethnic Russians. Chuvashia has 1.2 million inhabitants, 68% ethnic Chuvashes and 27% ethnic Russian. Udmurtia has the smallest share of a »titular« nationality among the Volga District republics; Chuvashia, the highest. Accordingly, ethnic Russians have the highest share of the population among the District Republics in Udmurtia, and the smallest in Chuvashia. The numerical dominance of the titular ethnic group makes language revival policies much simpler (Gorenburg 1999). On the other hand, Udmurtia is a highly industrialized republic, while Chuvashia is a primarily agricultural republic, and one of the economically weakest, with the largest rural population in the district. Chuvashia's dependence on subsidies from the federal government makes it less likely to try to implement policies which Moscow might consider inconsistent with federal policies; for example, the use of Chuvash in education. Among the 162 languages spoken by Russia's population of nearly 144 million, 131 are considered by UNESCO to be endangered. The Udmurt language, which belongs to the Finno-Ugric language family, has the status of »definitely endangered.« It has 324,338 speakers according to the 2010 census (there are 552,299 ethnic Udmurts in Russia) and is spoken not only in the Udmurt Republic, but in parts of

Tatarstan, Mari El, Bashkortostan, and Kirov and Perm provinces (Census 2010, UNESCO 2012). Chuvash is a Turkic language considered to be »vulnerable.« It has 1,042,989 speakers (three times more than Udmurt) according to the 2010 census (there are 1,435,872 ethnic Chuvashes in Russia), and is spoken in the Chuvash Republic itself as well as in parts of Tatarstan, Bashkortostan, and the Ulyanovsk, Samara, and Tyumen provinces (Census 2010, UNESCO 2012).

Modern Russian education for multilingualism

Russian scientists responsible for monitoring the educational situation in different bilingual settings claim that Russia's roots are polycultural, multilingual, and polycivilized, which is why the heterogeneity of Russian society has to be taken into account when creating educational modules; in order to satisfy the various linguistic and cultural needs of the population and to ensure the unity of education and the integrity of the state school system (Artjomenko 2008). According to Artjomenko (2008), in the middle of the 20th century, 18.5% of all children were non-Russian, and only 9% of all children were attending schools that operated in the native language or taught the native language. Of the 44 native languages taught, 21 were languages of general education, in 14 cases only for two-, three-, or four-year-olds. Tuvans and Kazakhs had native language education for seven years, Yakuts for nine years, and Tatars, Bashkirs, Armenians, and Georgians for 10 years. Other languages were taught as subjects from the first grade on, and »native« literature was taught from the fifth grade on. After the end of the Soviet Union, legislation in the RF was not as favorable toward the maintenance and learning of languages as in the national republics of the USSR. In the first years of national mobilization after the collapse of the Soviet Union in the 1990s, 31 languages were proposed as languages of general education and the number of the languages taught as subjects grew to 68; 13.5% of all educational institutions had some teaching of native languages. There are 89 languages taught; in average, about 56% of all educational institutions in the republics have some teaching of native languages, and new languages are being introduced (such as Rutul, Agul, and Cakhur in Dage-

stan). There are 39 languages taught in primary education (1st to 4th grades), 17 languages taught in basic general education (5th to 9th grades), and 14 languages taught in high school (10th and 11th grades). Fifty languages are taught as subjects (Artjomenko 2008). In the Komi Republic, all of kindergarten and schoolchildren are in some kind of titular language program (Ostapova 2012). In Sakha, Yakutia, more than 40% of the schools teach in the native languages, as opposed to 45% in Bashkortostan, 59% in Tatarstan, and 80% in Tyva (Artjomenko 2010). However, as Zamyatin (2012a, 22) points out, these are mainly rural schools, much smaller than those in urban areas, and the actual numbers of schoolchildren learning in their native languages may be lower than official statistics suggest. Official statistics announce only the number of schools, not the actual percentage of schoolchildren. One should be aware that although a language is publicized as being taught at a certain level, only a handful of students may actually receive this instruction. For instance, Chuvash is considered to be one of Russia's languages of basic general education, but less than 1% of schoolchildren attending grade 5 to 9 in Chuvashia learn in Chuvash (Alòs i Font 2014, 72).

In the Soviet era, the peoples of the north were meant to skip the capitalist stage and move from feudalism directly to socialism, giving up their traditional way of life, which was considered backwards and self-contained. Their languages were given new functions, e.g. orthographies were developed and textbooks printed, but they could no longer be used in the larger world. Minority peoples had to learn Russian as the language of international communication. The spread of education in Russian, migration to the cities, and involvement in new occupations were all processes that curbed the use of minority languages and reduced the number of speakers of those languages (Gurvich 1987, 136–51). As a countermeasure, in order to preserve the traditional way of life, in the 1990s new nomadic schools were introduced for the peoples of the north (Aref'ev 2014; Gorodenko 2010; Shusharina 2013). Our visits to the region observed increasing self-esteem and interest in their national heritages (including language) among autochthonous peoples, but a lack of means to transfer knowledge from the old to the young. Evidently,

these languages will only be used in traditional areas of life and will not develop the whole spectrum of modern uses. Even the names of animals such as elephants will remain absent in those languages.

The *Hague Recommendations Regarding the Education Rights of National Minorities* (OSCE 1996) state that it is crucial for the identity of national minorities to have the possibility to learn their mother tongue during the educational process and recommend that part of the education of these peoples should be provided in their mother tongue. In parallel, representatives of national minorities should have the opportunity to learn the state language properly in order to ensure integration into the broader society.

Likewise, authors on bilingual education have emphasized the importance of instruction *in* minority languages for subjects other than the languages themselves (Baker 2011; Skutnabb-Kangas 2000). Baker (2011, 206–52; see also Skutnabb-Kangas 2000, 579–622), in his influential typology of bilingual education, distinguishes between »monolingual forms of education for bilinguals«, »weak forms of bilingual education« and »strong forms of bilingual education for bilingualism and biliteracy.« The first type can be exemplified by the use of the dominant language (e.g. Russian) for minority-language students (e.g. Udmurts or Chuvashes) (so-called *mainstream* or *submersion* programmes). Among the second type, one can find the *transitional* programmes, which differ from the previous ones in that »language minority students are temporarily allowed to use their home language. Such students are taught briefly though their home language until they are thought to be proficient enough in the majority language to cope in mainstream education« (215). And he clarifies: »the basic aim of *weak* forms of bilingual education is assimilation of language minorities rather than maintenance of their home languages and cultural pluralism« (219). Cases of *strong* bilingual education include *maintenance* or *heritage language* programmes for language minorities, where both majority and minority languages are used in the classroom with emphasis on the mother tongue, and *immersion* programs aimed at majority-language speakers, where both languages are also used

but with an initial emphasis on the non-native language. Even more factors should be taken into account when teaching in extremely diverse classrooms today (García and Li Wei 2014), yet the general idea of multilingualism retains a reputation as dangerous and strange in modern Russia.

More deeply conducted investigations of multilingualism are disheartening and show that despite generally favorable conditions, in practice a high degree of knowledge of both languages is not achieved (Chevalier 2012, 2013; Khruslov and Kroon 2002; Protassova 2010; Protassova and Rodina 2014). In many cases, it may be too late to save the minority language despite all revitalization measures (Perekhval'skaja 2013). As Fomin and Fjodorov (2010, 101–10) reveal, knowledge about bi- and multilingualism is not widespread enough in Sakha, Yakutia: in bilingual families, parents are afraid to use their own language because they fear their children will not learn Russian properly. About 60% of the bilingual families are Yakut-dominant and switch between languages. Young people coming from the *uluses* (villages) to the towns abandon their mother tongue at home and speak it only a quarter of the time they previously did; only 1/3 of all families read in Yakut to their children.

In the new Law on Education (LE 2012), education in Russian as the state language is guaranteed, while teaching in other languages is provided if possible (Art. 14:1). The default language of education is Russian (Art. 14:2). In the territories of the republics (however not all languages can be divided by republics, many are divided along other administrative lines), teaching and studying of other state languages of the republics of the RF must follow the legislation of the respective republics within the framework of federally approved programs and educational standards and must be provided without harming the teaching and studying of Russian (Art. 14:3). Citizens of the RF have the right to pre-school, primary, and basic general education in the languages of the RF as well as the right to study their native language (*rodnoj jazyk*) as a language of the RF according to the legislation of the RF. The necessary educational organizations, classes, groups, and circumstances must be provided (Art.

14:4) and the educational organizations may themselves decide upon the languages of their educational activity (Art. 14:6; Art. 29). The state organizes production of the necessary textbooks and involves local experts into this process (Art. 18). Theoretically, parents choose the language of education (Art. 44). Pedagogical staff is not allowed incite racial or national tensions, also in the case of somebody speaking a different language (Art. 48). The state final examination may be provided in one of the official native languages of the RF (Art. 59:2). The main goal of general education is, among other things, to promote interpersonal and interethnic communication, including acquisition of the state language of the RF (Art. 66). »Russian« is not named, rather it is called *the state language of the RF*; while other ethnic or national languages (the former terminology) are called the *native languages*.

»Harming the teaching and studying of the state language of the RF,« which is Russian, is understood by the local authorities as the prohibition to teach only in the national language on the pre-school level, as we observed in the republics whenever teachers tried to organize »language nests« or immersion programs (although language nests were obstructed not only by local, but also by federal authorities; see Russia's Third Report to the ACFC 2010, 102).

In the USSR, teaching Russian and the development of bilingualism among the members of ethnic minorities was a great concern of the federal Soviet republics and did not raise so much attention inside the Russian Soviet Federal Socialist Republic (Kreindler 1989). The development of multilingualism was formally assured by the Constitution and measures were undertaken to write schoolbooks in the national languages of the peoples of Russia. Inside the RF, on the pre-school level there were quite a few teaching materials in the minority languages, and a handful of general children's literature. In reality, the languages of education were contingent upon the situation. Sometimes, when a kindergarten group or school class was not Russian-speaking and the teacher could speak the autochthon language, she translated everything into the language of the children; sometimes, the educational process

was conducted in Russian, but all everyday activities were in the local language. When the teacher did not master the language of her pupils, she spoke in Russian and the children had to learn it.

Nevertheless, the Russian educational system includes almost only submersion or transitional programs. University education is almost fully in Russian, and in most of the republics, school education in minority languages is only provided in primary schools in villages. Udmurtia does not offer general school instruction in Udmurt, and Chuvashia in Chuvash only until 5th grade (Zamyatin 2012a). According to Zamyatin's (2012b, 251) analysis of language policies in education in Russia's Finno-Ugric republics, »policymakers considered the compulsory teaching of languages to be the most important tool of language revival.« This reflects the situation in Chuvashia, where the Chuvash language was made a compulsory subject for all schoolchildren from the first to the last grades of schools in the early 1990s, but not for Udmurtia, where Udmurt is non-compulsory and, according to Zamyatin's calculations (2012b: 245), only 44.8% of ethnic Udmurt schoolchildren learned it at school in the 2008/9 school year.

The case of Udmurtia

The identity of the Udmurt people is connected with their homeland, with the Udmurt diaspora, with traditional culture, with today's achievements, and with the language. First, we would like to look at the history of language teaching, which influences educational results, then we shall summarize legislative and educational prerequisites for language teaching. After that, we briefly present the results of our studies in Udmurtia.

The Udmurt Republic is a sovereign republic within the RF (the previous ethnonym of Udmurts is votjaki). The history of the Udmurt clans and language is the subject of an intensive scientific discussion (see Churakov 2005). The 18th century efforts to make Udmurts Christians were conducted in their own language; this led to alphabetization and the formation of a national elite (before that time, the Udmurts lived in extended families of up to 50–70 people). Those who learned to speak

Russian ceased to be Udmurt and became Russian; this tradition persists to this day (Ponomarjov 2001; Semjonova 1996; Shkljaev 1998a,b; Vasiljeva 1999). The historical memory of Udmurts includes the legend that Udmurts received money for accepting Russian names and the Russian language. Udmurts today are finding their roots, practicing their national religion in the sacred woods, worshipping, poetizing nature, singing songs, and organizing ethnographic expeditions. In national kindergartens and schools, children study Udmurt folklore and reinterpret the role of the gods in their everyday lives. They create crafts connected to their culture, learn how to cook special foods, make baskets, weave, and make traditional wood decorations. Every educational institution has a corner or a so-called museum where national symbols are exhibited and the national cultural heritage, historical everyday utensils, clothes, and crafts are collected and explained. Some programs are based upon mythology and legends. Students are taught to play traditional music instruments. The state television company *Udmurtia*, museums, professional theaters, the Academic Choir, folklore song and dance groups such as *Italmas, Tanok, Aikai, Chipchirgan, Ekton Korka*, and the Eurovision 2012 contestants *Buranovo Grandmothers* represent ethnic culture. At the same time, there is a Russian part of Udmurtia: Votkinsk is known as the birth place of Tchaikovsky; the strategic rockets Topol' and Bulava are produced there; and it is also the home country of Kalashnikov, both the man and the gun. Udmurtia also has oil; KIA-Motors and some pharmaceutical firms are investors in the area.

The share of ethnic Udmurts in the population of Udmurtia is gradually decreasing. In 1939, Udmurts made up about 36%, in 1989 they were a minority of 31%, and in 2011 just 28% of the state population. There is a ministry of nationality affairs, many ethno-cultural organizations, and a »house of friendship between nationalities.« In 1926, 99% of Udmurts could speak Udmurt; in 1959, only 89%, and in 1979 their number had decreased to 77%. In the census of 1989, about 70% of the Udmurtian population still maintained the Udmurt language. Today, this number is closer to 59%. In mixed-ethnicity families, Russian-sounding names and the Russian nationality are preferred for children.

The artificial restriction of the functional sphere of the native language to the teaching and educational process, as well as a simplified understanding of the role that the native language and traditional culture play in the formation of a national consciousness, led to, by the 1970s, the complete loss of all traditions implanted in the 1920–1930s in Udmart schools by the educators I.S. Mikheyev, I.J. Jakovlev, K. Gerd and others. By the 1970s, the basic measurement of a school's success became the pupils' level of knowledge, first of all in the Russian language. The transition to Russian and the reduction of hours of instruction in the mother tongue were the reason for the loss of scientific, mathematical, and other Udmurt terms in school education; they were replaced by Russian concepts. Thus, the Udmurt child left a national primary school, came to Russian middle and high schools, and had no recourse to either the Udmurt or the Russian language. Being tongue-tied, these children became shy and timid. Unable to communicate and express themselves sufficiently, they became psychologically discomforted and deprived and unable to make decisions. Together with democratization, decentralization, and the differentiation of education in 1990s, reorganization has begun and the attitude towards teaching Udmurt has changed. Acquaintance with culture was constructed concentrically and gradually: from the home village or town (the immediate environment, its geography and history) toward the ethnic philosophy and traditions, native language and culture, Russian language and culture, world culture. Udmurt schools were also founded outside the republic (Vershinin 1998).

Native schools are situated predominantly in rural areas. Udmurt is spoken mostly in the villages, and urban migration is considered to be a threat to the maintenance of its use, because the trans-generational transmission is endangered and the Udmurt language is underrepresented in the cities. As Protassova and Bulatova (2010) have shown, elder speakers use Udmurt in everyday situations and use the local mass-media, while the younger Udmurts who live in the towns prefer to switch into Russian when they speak in public. The language shift was undertaken mostly by the generation who is in the early 2010s is around

age 40–60. There are quite a few Udmurts who, according to their own assessment, are competent speakers of the language (and who spoke Udmurt only before going to school), but do not speak it to their children. Their written skills fall behind considerably, and the younger generation has better standard language skills. The differences in the languages they use (dialects, degree of acquisition, competence in the Russian language, etc.) influence their attitudes and behavior in conversation and affects their self-appraisal (see Jedygarova 2013). Salánki (2007) has shown that Udmurts fear to expose their children to disadvantages at school. The lower social acceptance of the Udmurt language and their own insufficient competencies make Udmurt-speaking parents use Russian in family communication. She comes to the conclusion that the language must become more prestigious.

The Law of the Udmurt Republic *About the state languages of the Udmurt Republic and the other languages of the peoples of the Udmurt Republic* (2002) considers this indigenous language to be endangered despite the number of persons speaking it, because less and less Udmurts report it as their mother tongue. Since then, the administration has made some progress in introducing Udmurt in public places and documents, extending terminology, publishing new Udmurt-Russian and Russian-Udmurt dictionaries, and supporting computerization.

The *Conception of National Education in the Udmurt Republic* (Conception 2007) speaks about the mental consolidation of the polyethnic society. Meeting the ethno-cultural and linguistic demands of the RF's peoples while maintaining the unity of the federal cultural, educational, and spiritual space by securing the inner stability of the ethnically diverse society, are stated as priorities. The *Conception* reports that the quality of Udmurt language teaching has increased by 60%, while the quality of Tatar language teaching increased by 58%, but how this was measured and why it does not work remains unstated. New tendencies can be seen in the creation of textbooks for Udmurt as a second language for adults and in the preparation of many new schoolbooks about the Udmurt language and culture in Udmurt and in Russian.

The Vice-Minister of Education of the Udmurt Republic, Igor Belozjorov (2013), stated that the number of schools where minority languages are taught is decreasing due to the following reasons: teaching of the language became optional; parents changed their mind; there was no competent teacher; the school could not operate further because, for example, there were not enough children; or educational institutions merged. Special attention was given to not lessening the number of children who are studying Udmurt, and in some places, the language was introduced for the first time. The Kuzebaj Gerd Gymnasium in Izhar/Izhevsk is the national center of language resources and testing. There is a lively discussion about the role of the language in the republic. The newest statistics show that the number of schools in which the Udmurt language is taught decreased from 332 in 2003 to 242 in 2013/14, and that only 16,000 schoolchildren now study Udmurt (10% of all students; UP 2014).

Nowadays, there are five universities in Udmurtia that offer higher education for almost 25,000 students. Everything besides special subjects such as language, literature, and culture is taught in Russian. Educational conferences cover subjects such as pedagogical traditions of the Udmurt and other peoples living in Udmurtia, and intercultural dialogue as a means of patriotic and moral education. Recently, the pedagogical elite has turned to reforming language-teaching methods.

We repeatedly interviewed Udmurt-speaking Udmurt teachers from 2004 on (about 80 altogether) on their linguistic biographies and their attitudes toward the perspectives of Udmurt language teaching. There are different attitudes toward language use, as the two following excerpts show:

> Now in the family we speak in the Udmurt language, with my spouse and with the children. But, unfortunately, with my mum, who is a thoroughbred Udmurt, who has a superb knowledge of the Udmurt language, we continue to communicate in Russian only. What does it prove? That she grew up, was brought up, and worked in the days of […] well, the Soviet Union, so we see the change of times. And in no way can we ever persuade her to return

> to her native language. Well, anyway. Language becomes native only in the case when you can both speak and think in it. (LK, 40)
>
> In 1996, experts of the Ministry of National Education of our republic took out groups of children, senior pupils—winners of Udmurt Language Olympics—to Helsinki. The children adapted perfectly to the conditions. They spoke, excuse me, only in their native Udmurt language. This is something that we, unfortunately, did not observe in Udmurtia and, in particular, in Saint Petersburg. In Saint Petersburg they spoke only in Russian, and we have been pleasantly surprised, simply struck with how they excellently they felt in Helsinki as they referred with love to their native Udmurt language […] nobody could stop them. Nobody will forbid them to speak their native language […] They are free! […] And after returning to their native city, to Udmurtia, their own republic—they all spoke in Russian again. (AG, 54)

Recapitulating the data, we conclude that the status of the language inside the republic is not high enough and is not supported by those in power, who are afraid of not being able to understand what is going on when the Udmurt language is spoken. The attitude of Udmurts to their own language combines traditions, legends, and stereotypes with a sense of the unconditional advantage of linguistic mastery. Those who speak the Udmurt language were born in more or less mono-ethnic villages and started to learn Russian by the age of 7 or 8; at home, they still speak and think in Udmurt. T*he new terminology does not correspond to native speakers' linguistic habits; many think that it is too late for a language revival. When many languages are studied at the same time, the Udmurt language is not prioritized, Finnish or English are sometimes preferred. A certain number of speakers* are aware of the need to improve their Udmurt language skills, to speak it with their children and grandchildren, and to preserve ties with their native villages, although this is difficult, because it seems artificial. They listen to Udmurt music and sing Udmurt songs from time to time, which makes them feel happy. Orthodoxy and Paganism are interwoven, languages are mixed, and cultures are combined. Some Udmurts repeatedly

underlined that they are not nationalists, that they support other languages, that they are not backward pagans. Schoolbooks in the Udmurt language are lacking everywhere, even when the schools report that they teach the language. There are some prejudices about bilingualism: in the cities, nobody needs to speak Udmurt; only some enthusiastic folklorists seek out tradition-bearers to document the old culture and religion and they teach and pass these on to others; there is no need to speak Udmurt if you are fluent in Russian; those who speak only Russian cannot be real Udmurts; children can learn the language without being spoken to in it; it is not crucial to study your own language during childhood. Udmurt parents may send their children to Russian pre-schools and schools and accept the fact that their children will not develop fluency in their mother tongue, yet they consider knowledge of the native language important and are, to a certain degree, ashamed not to know their native language better. Sometimes they place their hopes on holidays with grandmothers.

In late 2013, we surveyed 109 parents of children who attend bilingual preschool groups in five daycare centers in Izhar/Izhevsk about what they think about bilingual education. We used questionnaires adapted from Moin et al. (2013). Only one-third of respondents agreed that children must know the Udmurt language first, although only 18% had some doubts about the usefulness of bilingual education. There was no special understanding of the role of literacy in the Udmurt language (only about 70% supported, at least partly, the idea of literacy in Udmurt), neither was there any clear conception of how bilingualism can be formed and developed and how two languages function. Parents appreciate the Udmurt culture, but do not put it first. Neither is the Russian culture the main goal of education for the parents. Even if the families are Russian-speaking, they think that the Russian language has to be supported by the daycare center. Ten percent think that English is the most important language for a career in the modern world. In answer to the question about the use of the Udmurt language in the family, they said that they use it in the village or at grandma's, or when speaking to Udmurts. Parents who speak in Udmurt in everyday situations with children report that Russian is used to explain things, to address the child when in the

presence of other children, when using public transportation, or when admonishing. When evaluating bilingual education, everybody supported the idea of knowing the Udmurt language, but did not see the importance of advanced learning; the acquisition of some words, phrases, songs and poems was deemed sufficient. Some were afraid that bilingual children may be teased.

Udmurt speakers share a common Udmurt ethnolinguistic memory; the interviews and questionnaires reveal that the education system is administered by non-Udmurt people who are not within a like-minded community. It seems that the young generation puts Russian first, followed by English and other world languages, but the Udmurt language is a mark of their local identity. There are no social campaigns to implement bilingual programs widely. Even the Ministry of Education only addresses ethnic Udmurts with the programs that do exist, because they are afraid to be treated as nationalists foisting their own culture on others. Russian parents could profit by such opportunities, but they are not instructed about the benefits of multilingualism, which is still not discussed positively in modern Russian society.

The educational situation in the Chuvash Republic

Chuvashia presents a somewhat different situation. According to the 2010 census, Chuvash is spoken by 55% of Chuvashia's population. Chuvash has been taught in all schools for the past 20 years, and education in Chuvash has been well established for more than one century. In principle, these figures and the official status of the language point to the language's relatively safe status. In reality, the situation is quite different, as shown by the fact that Chuvash lost 14% of its speakers in Chuvashia between 2002 and 2010, according to Russian censuses.

Census data show a clear distinction in the knowledge of Chuvash by nationalities. Chuvash is seldom spoken by people other than Chuvashes (the exception being, to some extent, Tatar village dwellers, who share a Turkic language with Chuvashes, albeit distantly related). In particular,

only 4% of ethnic Russians declared that they know Chuvash. This shows that Chuvash is used almost exclusively between Chuvashes.

A second major difference is between urban and rural populations. According to census data, in villages, 96% of Chuvash people know Chuvash, but only 63% in the cities. Language shift in cities were noticed long ago. Andreev (1970, 4) noted that »in the second generation, [urban Chuvashes] usually fully shift to Russian.« Baskakov and Nasyrova (2000, 76) reported that, according to the 1989 census, only 30% of urban Chuvashes under the age of seven were reporting as having Chuvash as their mother tongue, the lowest percentage of the 12 most-spoken Turkic languages of the Russian Federation analyzed (only urban Dolgans shared a figure below 50%). Ignat'eva et al. (2009, 42) show that there are very few schoolchildren in Chuvashia's capital city, Shupashkar/Cheboksary, who speak only Chuvash at home (2%), and only 23% speak Russian and Chuvash with their parents, although Chuvashes make up 63% of the city's inhabitants.

This language frontier between cities and villages is reflected in the school system. Schools in Chuvashia, as elsewhere in Russia's republics, are divided into »national schools«, and »schools with a multinational student composition« (also called »Russian schools«). In principle, the former are oriented towards native speakers and the medium of education in the first grades is Chuvash (or Tatar), while in the latter Russian is the language of education throughout. According to Russian terminology, Chuvash (or Tatar) are taught as »native languages« in the former, and as a »state language« in the latter by means different teaching methods and goals. In »multinational« schools, instruction is oriented »mainly [towards] oral communication,« at the expense of reading and writing (Andreev and Chernova 1998, 93). National schools have a few hours more devoted to Chuvash (or Tatar) than »multinational« schools, but the number of hours for Russian language instruction for both should be the same from the 6th grade onwards, in accordance to the Basic Syllabus defined by the Chuvash Ministry of Education, following the Federal regulation. In reality, Russian language and literature is given

two times as many hours per week than Chuvash in basic general education in the »multinational« schools, and one third more in the national schools.

Education in Chuvash exists only in villages. In cities, Russian is the only language of education and Chuvash is taught as a »state language«. In principle, rural schools teach in Chuvash until the 4th grade, and switch fully to Russian in the 5th grade. This schema was introduced at the beginning of the 1960s, when education in Chuvash was obliterated in the 5th grade and above. Although a timid attempt was made to reinstate Chuvash in higher grades in the early 1990s, the situation virtually has not changed. Nevertheless, since the early 1990s, Chuvash has been compulsory for all schoolchildren, irrespectively of their nationality, from the first to the last grade of school. Ignat'eva et al. (2010, 49) found that »a certain proportion of the schoolchildren […] do not progress in the Chuvash language classes at all«. In Shupashkar/Cheboksary they found that »11% of the schoolchildren do not know Chuvash at all« and that »this percentage is almost the same in all grades from the 5th« (Ignat'eva et al. 2009, 42). This kind of language teaching, where pupils can pass without significantly improving their knowledge of the Chuvash language, and where there is not even one nursery or school with some instruction is in Chuvash in an urban center, although half of all ethnic Chuvashes live in cities, shows a poor commitment to the Chuvash language on the side of the authorities. Not surprisingly, Chuvashia's language policy has been called »largely symbolic« and »in comparison to struggles regarding language policy in Tatarstan […] minimal« (Marquardt 2012, 141–42).

In order to understand the extent of the language shift in Chuvashia we undertook a survey of around 2,900 upper-grade schoolchildren from September 2012 until October 2013 in 82 schools in 48 towns.[1] The survey was conducted in three waves. From September until December

1 The survey was done with the help of the Chuvash Ministry of Education, to which we are much obliged. We are also indebted to the schools that made this survey possible.

2012, urban children were pooled. From February until May 2013 all the schools in the district centers and villages with above 3,000 inhabitants were visited. Finally, in September and October 2013 small village schools in two districts completed the sample. In every rural school (50) an interview was carried out with a school representative, usually the director or vice-director, about the use of languages in the school. These data were supplemented by observations on the ground and governmental statistics.

The effectiveness of language teaching is strongly influenced by the environment in which it takes place. Virtually everything in Chuvashia's schools is written only in Russian (the exception being the popular use of Chuvash in welcome signs over the front door, above all in rural schools). In urban and district-center schools, Chuvash is mainly used for festivals or activities related to Chuvash traditions, folklore, and culture. In these schools, Chuvash-speaking students and teachers often address one another only in Russian. Although often most of the school staff speaks Chuvash, their linguistic capabilities are not used to promote schoolchildren's practice of the language. The scarce use of Chuvash by schoolchildren with the school directors is striking. In the district centers, for instance, only 2% of our respondents said they use Chuvash with directors (in comparison, 11% speak Chuvash with teachers and 37% with parents). It should be noted that, as told by the interviewees, at parent meetings school representatives tend to use only Russian: when they report to parents at the beginning of meetings as a rule, and often also in the following discussions. This occurs even in small villages where almost all parents and teachers speak Chuvash in informal conversations. All this shows that school managers and teachers seldom overcome the deep-rooted habits that secure the very unequal position of the two official languages in society. As a result, the school, instead of gradually helping to solve this problem, is strengthening the use of Russian for formal and written communication and the relegation of Chuvash to casual conversations with acquaintances.

What is more, according to our survey, instruction in Russian strengthens the shift to Russian in the families during childhood. We were interested in knowing whether children reduced their use of Chuvash with relatives during childhood and youth and why, so we asked whether they noticed any changes from early childhood on in the language(s) they use at home. As verification, we added several questions about early use of languages. From the answers a picture emerged showing that some 12–14% of respondents of Chuvash nationality enlarged or lessened the use of Chuvash with their parents in the three types of settlements analyzed (cities, district centers and villages). In the cities, as almost always in the district centers, only an increase of Russian was found, but in the villages, a shift occurred in both directions (a bit more in favor of Russian). Interestingly enough, the shift coincided with the spread of instruction in Russian and Chuvash in primary school. As a matter of fact, more than a half of the Chuvash respondents who noticed an increase in their use of Russian at home, related it to the beginning of kindergarten or school. It must be emphasized that, as a result of the different degrees of language transmission in cities, district centers, and villages, those 12–14% in fact represent some 30–40% of urban Chuvash respondents, who originally spoke Chuvash with their parents and then increased their use of Russian with them (eventually fully shifting to Russian), as opposed to 15–22% in the district centers and around 7% in the villages.

Concentrating on the actual situation in schools, statistical data from the Chuvash Ministry of Education show the distribution of languages of instruction. As instruction in Chuvash exists only in rural primary school education, 9% of schoolchildren learned Chuvash in the 2012/13 school year.[2] As the rural population is quickly diminishing, if education in Chu-

2 According to the »Forma FSN No. D-7« (www.miccedu.ru/stat/stat_forms.php) for the 2012/13 school year kindly provided by the Chuvash Ministry of Education, with a few author's corrections from the »Forma gosudarstvennoj statisticheskoj otchetnosti OSh-1, RIK-76« (since the former is based on the latter), consulted in the Ministry archive. Observations on the ground show that these figures for educa-

vash does not expand to the cities and/or secondary schools, its importance will steadily decrease. Additionally, the comparison of the statistical data from the last 6 school years shows that the proportion of rural primary school students who enjoy education in Chuvash is declining every year: from 70.1% of rural primary school students in the 2008/9 school year to 61.5% in 2013/14. We were interested in knowing why this is happening in the villages.

Of particular interest are rural district centers because they stand between the Russified cities and the Chuvash-speaking villages. According to our fieldwork, in the 2012/13 school year, Chuvash was the medium of instruction only in a few of the less populated district centers, comprising 8% of primary school pupils in the rural district centers. Several schools have discontinued instruction in Chuvash in the last decade. According to our observations, 23% of primary school pupils in the rural district centers were taught Chuvash as their native language in the 2012/13 school year, while virtually all others learned it as »state language.« It is worth noting that this percentage increases throughout schooling: to 28% at secondary school and 33% at upper-level school. This shows the advance of Russian taught as a state language over the years.

Instruction in Russian with Chuvash taught as a state language has been the usual form of instruction in the district centers for many years, but in the 2000s, as a result of the introduction of the Unified State Exam, this situation was reinforced. This exam was gradually launched in the 2000s as a test for a high-school degree, enabling the entry to a university or professional college. Currently, it only has two compulsory subjects, Russian and mathematics, from 2020 English will be added. Other subjects may be required for certain faculties or studies. This structure has been interpreted by parents and teachers as a reassertion of the importance of the Russian language in education, at the same time it does not give any

tion in Chuvash are somewhat overestimated, even if we consider bilingual Chuvash-Russian education to be education in Chuvash.

significance to minority languages. Unsurprisingly, the need to devote more hours to Russian (and English) in order that students pass the State Exam was mentioned by many interviewees. Since shifting to a »multinational« school syllabus reduces the number of hours devoted to the Chuvash language and facilitates an increase of the hours devoted to Russian, many of the school officers we interviewed considered this shift very helpful for passing the exam, and often reported that most parents also felt the same.

In order to understand the situation of village schools outside the district centers we visited, among other schools, 2/3 of the schools of the Murkash/Morgaushi district, a district near the capital city. The population is 96% Chuvash and 89% of our respondents speak Chuvash fluently.

According to the Ministry of Education, there are two schools in the district in which all instruction is in Russian (in the two major population centers, the only towns in the district with more than 1,000 inhabitants). All other schools teach in Chuvash from 1st to 4th grade. In reality, we found a very different situation. Half of all schools use mainly Russian in primary education and even more use mostly Russian for teaching mathematics and science. According to our interviewees, schools mostly shifted to Russian in the past 10 years, especially in the past 5. This shift took place mainly in the northern part of the district (closer to Shupashkar/Cheboksary), where Chuvash is receding in family use (85% of the respondents speak Chuvash with their parents, but 33% use mainly Russian with them). It should be remarked that Chuvash is also losing ground as the language of instruction in the central part of the district, although it remains the main language of the vast majority of families (92% of the respondents speak Chuvash with their parents and 16% use mainly Russian). In the southern part of the district, where Russian is the

main language of communication with parents for a mere 3.5% of the respondents, Russian is substantially less used in the primary school.[3]

Interviewees gave different reasons in explaining the shift to education in Russian. Above all, the will of the parents was invoked. As this does not explain the basis on which this will appears, other causes were proposed, such a slight shift to the use of Russian in families or individual cases of newcomers, from the city or from outside the republic, who do not understand Chuvash. There were complaints about the lack of new textbooks or workbooks in Chuvash, which should be published because of new federal educational standards, but most of respondents denied this caused a real problem. More importantly, interviewees considered it unpromising to teach in Chuvash, especially mathematical and scientific terminology, as it will not be used afterwards in secondary education. Furthermore, many complained about new terms in Chuvash, such as »triangle« and »point«, which they considered difficult to understand for pupils, parents, and even teachers (previously, Chuvash terminology, as a rule, borrowed words from Russian without any changes, not even orthographic changes, while currently, for instance, »triangle« is constructed, as in Russian, by compounding the words »three« and »angle« from the Chuvash words).

In our opinion, the shift to instruction in Russian has varying grounds: the ongoing concentration of schoolchildren in larger schools, which increases the importance of schools that teach in Russian in the regional centers and major villages, and the lack of Chuvash schools in cities, especially in the capital. Their absence calls into question whether Chuvash-language schooling is compatible with modern urban high-level education. The idea that minority-language education is only or mostly a

3 Respondents in the north: 134; in the center: 243; in the south: 267. It should be noticed that we pooled schoolchildren from the 7th grade and above where changes occur in the last years of primary school. A certain number of interviewees reported a small increase of children who do not speak Chuvash in primary schools in the past few years, but played this down.

transitional state, necessary because village children have a poor command of the dominant language and that (standard) Chuvash has no instrumental value for getting a job or a promotion and does not need to be learned and used as a fully functional language, is deeply rooted in the minds of the majority of parents, teachers, school officials, and Ministry clerks.

With regard of the authorities' attitudes towards the Chuvash language, it is worth examining the »Strategy for the development of education in the Chuvash Republic until 2040« (Chuvash Republic 2008). The document gives little attention to Chuvash, in contrast to foreign languages, for example. It admits that there has been »ineffective work to enhance the prestige and social significance of the study of the Chuvash language« (Chuvash Republic 2008, 65), but does not find room in its more than 90 pages to analyze the causes of this ineffectiveness or ways to resolve this problem. Moreover, the document does not consider Chuvash part of the Republic's linguistic capital, and does not speak of it in the development of »polylinguism« (Chuvash Republic 2008, 61). The journal of the Ministry of Education, for its part, merely states about the teaching of Chuvash in its presentation of the Strategy that »the practical significance and the results of the study of Chuvash must be shown« (Jaroslavskij 2008, 9). It should be noted that almost at the same time, Chuvash-language specialization for preschool education was ceased in Shupashkar/Cheboksary, allegedly due to insufficient enrollment.

Discussion and conclusions

After the demolition of Soviet structures, there was a tendency to transfer the idea of the USSR as a federal country to the RF, so that the federal national republics inside Russia could copy the model of the former Soviet republics. This idea helped to mobilize ethnicities, but failed as the central authorities became worried that the new federal organization could dissolve in the same way as the former Soviet Union. The fear of autonomization dates from the pre-socialist era; it characterized the Russian Empire and decreased after the October revolution under Lenin, but emerged again under Stalin (Alpatov 1997; Pavlenko 2008). Laws al-

low for the normal functioning of minority education, but official documents underline the preferable dominance of the state language. For minority language speakers, this means that they are often afraid of being stigmatized as nationalists, chauvinists, traitors to their motherland, pagans, or uneducated bumpkins when speaking their languages. In spite of improvements in language education, many parents in Russia's regions are afraid that their children will be damaged if they acquire two languages in parallel; the ethnic, family, or heritage language and the state Russian language. The advantages of being bilingual are not promoted or explained. Despite all evidence of the dominance of the Russian language and continuing Russification, the general opinion remains that bilingualism may be dangerous for children and that deep knowledge of a minority language is not necessary.

The protection of the large spectrum of Russia's autochthon languages depends not only upon measures to transfer the languages from one generation to another. An atmosphere that promotes bilingualism should be created. People should not be ashamed when speaking a language that does not fulfill all the main social functions or »uneducated« minority languages. Although bilingualism is quite common among members of national minorities, it has hardly been studied. Evidence-based data on the monolingual minority and on bilingual language acquisition is needed. Modern textbooks and teaching materials must motivate speakers to implement their language competence in the educational process; they should be interesting and affordable, specific, rich in language, full of examples of natural communication, support different types of scaffolding, etc. Languages have to be more equal in education; their functions should be balanced in order to use the minority languages of the RF more effectively. Language policy must be an integral part of administrative measures on all levels. The final examination should support and appreciate the linguistic capital of the peoples of the RF and integrate the positive experience of multilingualism.

In Udmurtia, the situation of native language teaching was worse than in Chuvashia (as measured by minority children who learn their native lan-

guage and learn by means of it), which is logical because of the lower percentage of Udmurts (the fact that Udmurtia's education system is administered by non-Udmurt people who are not within a like-minded community is revealing). However, it seems that in Udmurtia some bottom-up action has begun, as some teachers have understood that action depends on them. This kind of reaction has not yet been seen in Chuvashia, since Chuvash administrators and teachers seem quite confident of their demographic importance. Yet the positive discourse on (real) bilingualism that seems be emerging in Udmurtia is practically nonexistent in Chuvashia.

Only rarely are languages represented as a state treasure of the Russian Federation, in contrast to the cultures of the many people of the RF, which are underlined as part of the nation's wealth (Strategy 2012). As in other domains of state politics, majority rights in educational policy are placed above minority rights. In many cases, belonging to the majority is considered to be an absolute gain and desirable by all without challenge. This gives law-makers the putative right to underline the integration of minorities into the majority rather than the maintenance and promotion of minority languages in education. Russian is considered the language of competitiveness and mobility, providing solidarity among citizens.

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Draft instrument for detecting post-Soviet and post-authoritarian dependencies in social sciences and humanities education

Tatjana Zimenkova

The following is a short description of a draft instrument to define indicators suitable for detecting post-socialist or post-authoritarian path dependencies within teaching materials, textbooks, curricula, etc. The instrument has been designed for the sphere of citizenship and civic education, but can also be used for the analysis of materials from history, social studies, and other related subjects. The instrument consists of two steps, whereby the first step can be used on its own.

Step one: *Detection* of visibility of path dependencies/influences in the material analyzed in general. The guiding question is whether the material in question (teaching material, curriculum, educational policy document, transcript of an interview with the teacher, recording of a lesson, etc.) can be considered to be (influenced) or produced by a post-socialist/post-authoritarian path dependency.

Step two: In part, the instrument allows for detection of the *modality* of path-influences and answers the question of whether the path dependency detected should understood as continuity, as a break or as a specific post-space within which continuities or discontinuities are not yet defined.

Examples:

As regards content and identity (I.1 in Figure 1 below), one should ask whether the material in question address *identities* in the context of the transformation narrative (*step one*). If yes, the question is whether the educational material stresses the »national congruence« of the country

(Geller 1997). If so, one can speak of the *continuity* of educational tradition in the context of path-dependency (*step two*). One must also examine how heterogeneities are addressed: If the *homogeneity* of the society is not being addressed (or at least not being positively framed), then we can speak of path dependencies fading in this aspect of educational tradition (*step one*). A marker of *educational continuity* would be an attempt to establish homogeneity among learners (*step two*).

Looking at the teacher's role and uncertainties (II.1 in Figure 1 below), *step one* would be to examine how explicitly uncertainty as a condition of social science knowledge or as a characteristic of the teacher's position is being addressed. *Explicitness* would be a marker of path dependency. Uncertainty resulting from an educator's self-perception as a non-indoctrinator, emerging within the narrative of national pride and identity construction, would be a marker of an educational *break* (*step two*; Jeliazkova in this issue).

I consider the instrument to be a basis for discussion and would be thankful to any comments or feedback on its application.

I. Contents of citizenship and civic education

1. Identities (Linz and Stepan 1996, 36) and diversities	1.1. Building bridges/addressing the pre-transformational condition addressing »lost (political) homeland« (Smith 1999, 216) as a specific indicator of transformational path dependencies in educational settings and hence the mark of a *break in the educational tradition*; addressing the »national congruence« of the country (Geller 1997) as a special mark of post-Soviet teaching, and hence a mark of *continuity*.

	1.2. Nation-centered, patriotic or nationalist educational discourses (Gross 2010, 215) appealing to the construction of national (post-socialist) identities (Heyneman 2000, 180–82), addressing »ethnic« citizenship (Smith 1999, 6) as a sign of the relevancy of post-socialist dependencies or meanings in education; these phenomena mark *continuity* in the educational tradition. 1.3. References to diversity (Smith 1999, 130); striving for homogeneity among learners as a possible indicator of post-socialist uncertainties within the educational systems; allowing for diversity; growing empathy towards diversities and heterogeneities as possible indicators for the *fading* of transformational path dependencies.
2. Europe	2.1. Work with (or adaptation of) teaching materials on Europe issued by EU/COE as a mark of the fading relevancy of post-dependencies in education and the increasing role of other macro-political dependencies; comparison of the role of the country within supranational organizations with the role country played as part of the »socialist camp« (Zimenkova 2011); juxtaposing national and European citizenship identities (Gross 2010, 214) as an indicator for post-socialist or post-authoritarian citizenship education (dependencies can be detected, *step one*), demonstrating a *break* in educational tradition (*step two*).

	2.2. Tensions between »rationalities of nation-state building« and »rationalities of catching up with Europe« (Fimyar 2010, 64) as an indicator for post-socialist historical and political education, indicating a *break* in educational tradition.
3. History	3.1. Addressing the historical period of the Cold War and socialist times as continuity or discontinuity (the latter: marker of *break*); establishing historical continuities (Linz and Stepan 1996, 402) as an indicator of post-socialist education (*step two*: continuity). 3.2. Addressing the emerging of European citizenship identities as a break with socialist/authoritarian civic education (in teachers' identities or in new teaching conceptions) (Gardinier and Worden 2010, 190; Jules and Barton in this issue) as an indicator for the relevance of transformation processes (explicitness of European identities as »new« identities as a marker of path dependencies, *step one*; acceptance of these new European identities as a marker of a break within educational tradition, *step two*).

II. Reflecting on teachers' role and identity and the process of knowledge production

1. Uncertainties	1.1. Uncertainty of knowledge production (Lindblad and Popkewitz 2004, ix): What do teachers anticipate with respect to who produces knowledge in social sciences and history? How do teaching materials address knowledge production and indoctrination in socialist times (establishing relations or distancing as indicators of path dependencies, *step one*)? Reflection of the subjectivity and changeability of social science knowledge as indicator of a *break* (*step two*). 1.2. Uncertainty of balance between educators' self-perception as non-indoctrinating (*break*) and narrative of national pride and identity construction (*continuity*) as indicator of post-socialist education (Jeliazkova in this issue); both breaks and continuities are detections of the relevancy of path dependencies (*step one*). 1.3. Uncertainties of teaching profession (Niyozov 2011): Uncertainty with respect to one's own role in the societal hierarchies, job security, and the perception of one's own professionalism with respect to the alternating content of education (see Vitrukh in this issue) as indicator of a path dependency (*step one*) and a *break* in educational tradition (*step two*).

	1.4. Teachers support of the transformation of educators from knowledge providers to assistants in the search for knowledge (Vitrukh in this issue) as indicator of the establishment of new forms of teaching (*break*, *step two*).
2. The significance of social sciences as perceived by teachers	2.1. Which significance do teachers ascribe to the social sciences and civics as school subjects? Do they address the indoctrination potential of these subjects (marker of a *break*, *step two*)? If yes, do they address this with respect to socialist/authoritarian past (marker of path dependencies, *step one*) or to current times as well (marker of a *break in educational tradition* or of the *fading* of path dependencies)? 2.2. Objectivization potential of knowledge (Niyozov 2011): do teachers (or the authors of the teaching materials) try to address knowledge in social sciences as unchangeable, scientifically proven »truths« that cannot be manipulated through political processes (marker of the continuity of educational tradition, *step two*)?

Fig. 1: Indicators for detecting post-Soviet and post-authoritarian dependencies in social sciences and humanities education

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