Pedagogy and Educational Sciences in the Post-Soviet Baltic States

1990
2004

Changes and Challenges

To Leonards Žukovs

Pedagogy and Educational Sciences in the Post-Soviet Baltic States, 1990–2004: Changes and Challenges

Content

Foreword

Baltic Association of Historians of Pedagogy: the First 20 Years

The third collection of articles prepared by the Baltic Association of the Historians of Pedagogy (BAHP) is heading to its audience. The two previous collections were devoted to the overview of the history of education of the Baltic states until 1990,[1] but this third book provides insight into the turbulent changes in education after the Baltic states regained independence in the 1990s until their entry into the European Union in 2004.

Thirty years ago, on 23 August 1989, two million Latvians, Lithuanians, and Estonians joined hands, uniting the capital cities of the Baltic states to proclaim a common goal – liberation from the Soviet Union and regaining of national independence. This event revitalised cooperation between the Baltic states, including universities and scholars. After regaining independence, it became relevant for historians of pedagogy (education) to unite in an organisation that could strengthen networking between the leading scholars that had already begun in the 1970s.

The Baltic Association of the Historians of Pedagogy was founded in 1999 with headquarters in Riga and three branches in Latvia, Lithuania, and Estonia. Prof., Dr. habil. paed. Leonards Žukovs (1922–2019), was the initiator and founder of the Association. Until 2010, Žukovs was the Board Chair and Honorary Chair until the end of his life. Several significant Baltic historians of pedagogy, members of BAHP, have passed away in recent years. Lembit Andresen (1929–2016), Maria Tilk (1948–2015) and Vello Paatsi (1948–2015) are with us no longer.

Gratitude for organizing the activities of the Lithuanian branch over the last decade should be expressed to Vidimantas Raudys (Klaipeda University) and for management of the Estonian branch to Vadim Rouk and Veronika Varik (Tallinn University). Since the founding of BAHP, Romāns Alhimionoks, owner of the education literature publishing house *RaKa*, has been actively involved in the life of the Association: he has been the patron of all previous BAHP publications, collections of articles, conference programmes, and other printed

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[1]   A. Krūze, I. Ķestere, V. Sirk, O. Tijūneliene (eds.), *History of Education and Pedagogical Thought in the Baltic Countries up to 1940: an Overview*, Rīga, RaKa, 2009; I. Ķestere, A. Krūze (eds.), *History of Pedagogy and Educational Sciences in the Baltic Countries from 1940 to 1990: an Overview*, Riga, RaKa, 2013.

materials. It should be mentioned that the Latvian Academy of Sport Education and the University of Latvia have also been BAHP supporters for many years.

Much has been achieved through joint efforts between historians of pedagogy from Latvian higher education institutions, scholars from Klaipeda and Vilnius Universities (Lithuania), and Tallinn and Tartu Universities (Estonia). International conferences have been organised on a regular basis in each BAHP branch and conference proceedings on current research in the history of pedagogy were published; for example, *Reformpädagogik and the Baltics* (2003), *Research in the History of Pedagogy in the Baltic States* (2004), and *Pedagogy in the Changing Historical Conditions of the 20th Century in the Baltic Countries* (2009).

In 2011, the 800th anniversary of Riga Dom School was celebrated with an extensive programme and a collection of articles, *Origins of Riga Dom School and Education in the Baltics*, depicting the history of Dom schools in Riga and Tallinn as well as development of the first schools in Lithuania. In 2013, BAPH was honoured to fulfil the responsible duty of organizing the 35th International Standing Conference for the History of Education (ISCHE) 'Education and Power: Historical Perspectives' at the University of Latvia. ISCHE 35 was attended by 226 delegates from 103 universities in 38 countries. In 2017, an international conference at the University of Latvia, 'Reformation in the Modern World', was devoted to the 500th anniversary of the Reformation at which a panel discussion, 'Reformation for Education and Upbringing', was organised in cooperation with BAPH. In 2018, BAHP supported the 9th History of Education Doctoral Summer School (HEDSS-9) at the University of Latvia, bringing together new scholars and experts from 16 countries.

Employees from various Baltic museums are involved in BAHP, encouraging focus on museology and museum pedagogy. Museum experience was gained at Baltic universities and school museums as well as the Leipzig School Museum; in 2017, BAHP organised an international conference in cooperation with the Ventspils City Museum.

What we have gained from this extensive and successful cooperation effort? Academic and scientific networking has promoted interest and understanding about the Baltic states in the framework of European history of pedagogy; various forms of cooperation and joint studies have contributed to the content and methodology of pedagogy history research; regular meetings and experience exchanges have given new impetus for transformation processes in schools, universities, and museums; and interest in research and a 20-year-long friendship promises to stimulate future cooperation among the young generation of historians of pedagogy.

The purpose of BAHP's third book is to provide research-based articles about turbulent changes in education after the Baltic states regained independence. Historical review reveals the complexity of the post-1980s. The four sections demonstrate the various interests of historians of pedagogy, and their choice of topics reflect current studies and scope of activity. In total, changes in the history of education in the Baltic states are comparable: democracy meant

development of new laws and regulations in education, creation of new study programmes and curricula, and preparation and publishing of textbooks and teaching/learning aids. However, a review and comparison of results achieved in pedagogy and educational sciences during the last 30 years indicate that each country also has its own specific traits that may seem interesting to BAHP members.

I would like to express my gratitude to all the contributors, but especially editors Iveta Kestere, Ene-Silvia Sarv, Irena Stonkuviene, and Aija Abens, as we would not be able to publish this collection without their determined efforts.

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Baltic Association of the Historians of Pedagogy
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Introduction

Becoming Independent: Renewal of Education in Estonia with Parallels in Latvia and Lithuania

Ene-Silvia Sarv

Abstract. The article describes the early period (1987–1997) of education renewal in Estonia and other Baltic countries by analysing the timeline of emancipation and influences of participative democracy. The subject of study covers the main activities and ideas, conceptions of (re)creation of a national school, and education in Estonia with some parallels and interactions with Lithuania and Latvia. The problem addressed in the study is the character of educational changes and the nature of the contradictions in these changes. The research method is reflective qualitative documentary research, including publications, oral and written memories, and context and comparative analysis. Conclusions indicate that general use of terms quickly emerged in a paradigm of changing metaphors and keywords: democratisation of education, school autonomy, national education (upbringing), humanisation, pluralism, etc. Wide grassroots participation was rejected by the parallel regime of knowledge/power that had strong influence during this time. Cooperation among Baltic countries influenced the conceptual aspects of national education/school and supported developments during the initial period of renewal and later.

Keywords: history of education, renewal of education, Baltic states, Estonia, Latvia, Lithuania, paradigm change

Introduction

In 2019, the three Baltic states – Estonia, Latvia, and Lithuania – celebrated the 30th anniversary of the *Baltic Way* (or Baltic Chain). On 23 August 23 1989, 1.5 million people joined hands in a 675-km-long uninterrupted human chain from Tallinn through Riga to Vilnius. They chanted: "Freedom! Freedom! Freedom." The pathos, idealism and enthusiasm that culminated in this precisely organized event were broadly inherent to the renewal of education that began in 1987. Metaphorically we can ask: "Was it a way or a chain?"

For almost 50 years, Estonia, Lithuania and Latvia were subjected to Soviet authoritarian occupation ideological, political, and economic policies within the Soviet Union along with its centralized system of education. Yet, Estonia found a way, especially in the 1970s and 1980s, to gradually introduce more independent education policies. Some textbooks were written in Estonian by Estonian authors, and school lasted 11 years compared with 10 years in most Soviet republics. Many schools had a specific specialisation or specialised classes from primary grades on (such as English, German, French, the arts)

or in grades 9–11 (such as mathematics, physics, chemistry, history, literature, theatre). Despite outward compliance with Soviet requirements, many Estonian teachers and teacher trainers, especially those who received their comprehensive education and teacher training in the Estonian Republic (1920–1940), retained a vision of the Estonian national school from the "golden years" of independence. The situation was similar in Latvia and Lithuania.[1]

The USSR experienced a new awakening in the late 1980s under Gorbachev's *glasnost* and *perestroika*.[2] But the issues, demands, and popular movements from 1987–1991 in the Baltic republics differed significantly from processes in the other Soviet republics. Once the path to liberalisation emerged, the Baltic republics attempted to break free from Soviet control in a drive for independence in economy[3] and education and for political sovereignty. In 1988, the Popular Fronts of Estonia (13 April) and of Latvia (21 June) and the Lithuanian Renewal Movement *Sajūdis* (3 June) were founded. The Baltic Way and the "Singing Revolution" led to the re-establishment of independence in all three Baltic countries after the collapse of the USSR in 1991.

A decade later, an OECD team studied educational politics in all three countries and noted that education has historically been a central priority for each of the Baltic states, especially since regaining independence. Education was critical for transition from a half-century of occupation and the pervasive impact of Soviet policy, ideology, and command economy. As relatively small countries with limited natural resources, the Baltic states recognized that human capital was their most important asset for competition in the global economy. All three Baltic states understood that progressive education and training policies were essential pre-requisites to accession to the European Union.[4] OECD reports[5] and McGuinness both noted that the differences and similarities in post-socialist country transition processes give copious material for analysis and interpretation.

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[1] See I. Ķestere, A. Krūze (eds.), *History of Pedagogy and Educational Sciences in the Baltic Countries from 1940 to 1990: an Overview*, Riga, RaKa, 2013.

[2] Democratisation of Soviet Union (announced by Gorbachev in January 1987) as *perestroika* (re-structuring, innovation, renewal) included transparency/openness as *glasnost*, which enabled the greater freedom (including economy, public sphere) and public exchange of different opinions than had not been possible before Gorbachev.

[3] In September 1988, Self-management Estonia (IME) was announced to make Estonia economically independent, self-managed (adopt a market economy, establish Estonia's own currency and tax system, etc.).

[4] A. McGuinness, 'Overview of Education Policy Reviews of Estonia, Latvia and Lithuania,' in *Colloquium* '*Education reforms in Baltic states 1987–2000: critical evaluation and future strategies*,' Tallinn, 2002. Available: http://www.haridusfoorum.ee/index.php?page=overview_of_education_policy_reviews_of_estonia_latvia_and_lithuania#1 (accessed 13 February 2012); OECD, *Reviews of National Policies for Education: Estonia,* Paris, OECD, 2001.

[5] OECD, *Reviews of National Policies for Education: Estonia*, Paris, OECD, 2001; OECD, *Reviews of National Policies for Education: Lithuania*, Paris, OECD, 2001; OECD, 'Reviews of National Policies for Education: Latvia,' 2001. Available: http://dx.doi.org/10.1787/9789264192478-en (accessed 14 July 2017).

Despite OECD overviews and research, the years 1987–1991/2 and 1996/7–2004 were not recorded with sufficient precision or studied and interpreted in depth. This period was rich in events and developments that continue to have a significant impact today through education curricula, school culture, educational organisations, teacher education, educational research and general value systems, not to mention the life and destiny of the educational intelligentsia.

This study provides a brief overview of the transition period in education in the Baltic states, especially the early years after regaining political independence. The case study will focus on Estonia where I participated in educational reorganisation processes and preserved documents and memories that could serve as historical sources. My narrative is coloured by my experience, but subjectivity is an unavoidable part of historical study.[6] Lithuanian and Latvian approaches were analysed based on published materials[7] and discussions with colleagues of the then Baltic Board of Education (1988–1990) and actors in educational renewal.

A more detailed historical overview will give better understanding of the other articles in this collection and perception of the context of change and achievements.

Background: *perestroika,* national independence, and national education

In Estonia, the transition period began with the mass movement against phosphorites mining[8] in the spring of 1987. In Latvia, people protested

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[6] E. Tucke, 'The Subject of History: Historical Subjectivity and Historical Science,' *Journal of the Philosophy of History*, no. 7, 2013, pp. 205-229.

[7] R. Bruzgelevičienė, *Lietuvos švietimo kūrimas 1988–1997* [Creation of education in Lithuania 1988–1997], Vilnius, Sapnų Sala, 2008; O. Zīds, 'Vienoti kopīgam mērķim un sasniegumiem' [United for common purpose and achievements], in A. Krūze, Ē. Lanka, J. Aizpurs (eds.), *Latvijas Universitātes Pedagoģijas, psiholoģijas un mākslas fakultāte zinātnei un izglītībai. PPMF 30* [University of Latvia, Faculty of Education, Psychology and Art for science and education. FEPA 30], Rīga, LU Akadēmiskais apgāds, 2013, pp. 32-41; M. Lukšiene, 'Education and culture,' in M. Lukšienė, R. Bruzgelevičienė, V. Vaicekauskienė (eds.), *Educating for Freedom*, Vilnius, Alma Littera, 2014; A. Šmite, *Pedagoģisko darbinieku tālākizglītība Latvijā (1944–1990)* [Latvian Teachers In-Service Institute's Educational Innovation (1944–1990)], Rīga, RaKa, 2015.

[8] The large-scale phosphorite deposits planned by the central government of the USSR threatened irreversible damage of the natural environment and the destruction and pollution of the entire groundwater system of north eastern and central Estonia. The other, more covert issue was the fear that the new mines would need a workforce that would start a wave of migration, bringing tens of thousands of workers from other parts of the Soviet Union to Estonia. This would have greatly worsened the already fragile demographic balance. The Phosphorite War activated the Estonian masses, gave people faith in the power of collective action, destabilized the Soviet Government in Estonia. See H. Vogt, *Between Utopia and Disillusionment: a Narrative of the Political Transformation in Eastern Europe*, New York, Oxford, Berghahn Books, 2005, p. 333.

the proposed building of a subway in Riga at the end of the 1980s.[9] The Congress of Teachers of Estonia on 26 March 1987 was the beginning of energetic liberation of school education from excessive authoritarianism and Moscow's centralised rule known as 'educational renewal' (*haridusuuendus*).[10] Lithuania and Latvia experienced almost similar processes. As it often happens, educational events and processes are shadowed in the general public by brighter or more painful occurrences. So, it is important to study and understand education processes as complex and individual.

For the pre-story of gaining independence in Estonia and its educational renewal, several meaningful phenomena were essential:

- Strong national culture traditions, including regular mass national song and dance festivals with 20 000–35 000 performers and hundreds of thousands of viewers, including TV and radio-audience.[11] Lithuania and Latvia has the same tradition. Also, the Singing Revolution – a unique phenomenon (1987–1989) – was a natural outgrowth of this tradition.
- Existence of semi-legal nonpolitical associations such as the Association of Natural Scientists, Association of Physics Teachers, and the Association of Nature Conservationists in Estonia and the Environmental Protection Club in Latvia ("Greens" in the Soviet era). Some of these became the central force in national movements and later, the core of political parties.
- Existence of advanced, progressive educational institutions such as the Teacher In-service Training/Professional Development Institute (STPDI),[12] Public Institute of Teachers-Researchers (PIPR), groups of

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[9] Subway construction was planned in Riga, which raised concerns in Latvian society about the threat to the urban environment and about the arrival of Russian-speaking builders and their families from other USSR republics.

[10] P. Kreitzberg, S. Priimägi, 'Educational Transition in Estonia, 1987–1996,' *Oxford Studies in Comparative Education*, vol. 7, no. 2, 1998, pp. 47-60; E.-S. Sarv, 'Political and Social Transformations – Analysis in the Estonian Context,' in H. Niemi (ed.), *Moving Horizon in Education. International Transformations and Challenges of Democracy*, Helsinki, Helsinki University Press, 1999, pp. 39-65.

[11] For more on Song and Dance festivals and the Singing Revolution see M. Hellrand, 'Estonian Song Celebration timeline.' Available: https://estonianworld.com/culture/estonian-song-celebration-timeline/ (accessed 18 February 2020); G. Šmidchens, *The Power of Song: Nonviolent National Culture in the Baltic Singing Revolution*, University of Washington Press, 2014.

[12] In 21st century publications in English, some parallel forms of the name and abbreviation appear: RTITI/ETITI – Republican/Estonian Teachers In-Service/Professional/Further Training Institute (various authors); STPDI State Teacher Professional Development Institute. See M. Lees, 'Estonian Education System 1990–2016: Reforms and their Impact,' 2016. Available: http://4liberty.eu/wp-content/uploads/2016/08/Estonian-Education-System_1990-2016.pdf (accessed 21 February 2020).

progressive scientist and academicians in universities, and the Institute of Pedagogical Research (SIPR) became the engines of educational reform.[13]

Early books and articles on *perestroika* concentrate mainly on economic processes and view *glasnost* as a step towards economic reconstruction, its political pre-condition.[14] Yet for the Baltic states, democratisation, cultural rebirth, and human dimensions were the most important.

In Estonia, the first years of *perestroika* resulted in a growth of national consciousness, followed by the split of the Estonian Communist Party into a Moscow-oriented faction and a national wing. The Estonian Popular Front grew out of the latter. The same happened in the other Baltic states. This was one of the pre-conditions for gaining independence in 1991. In Estonia in 1987, Minister of Education Elsa Gretchkina was strongly influenced by national-minded researchers, teacher educators, and school leaders and adopted the idea of Estonian national schools and education. In Lithuania, Meilė Lukšienė, education scientist and historian at the Lithuanian Institute for Pedagogical Science and Research, was a founding member of *Sajūdis* in 1988 and a leader in reform and development of Lithuania's education programmes.

Changes in the Latvian education system were also noted in the second half of the 1980s. Minister of Education, *Dr. paed.* Aldonis Builis (1930–2001), was not exactly a fighter for Latvian independence, but he was well aware of school practices and highly respected among Latvian educators. He was a democratic leader and a diplomat. These were qualities that helped him survive under Soviet dictatorship.[15] Although Builis belonged to the Soviet nomenclature, the pedagogical ideas expressed in his works in the 1980s and early 1990s were closely linked to problems in schools after the restoration of independence.[16]

What was essential was that the foundations of educational renewal did not come down "from the top" (Moscow or regional communist party centre), according to Soviet tradition. Emerging ideas and first steps were predominantly

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[13] In every institution there were people who initiated or actively participated in the renewal movement and those who resisted it. This divide did not appear between communists and others – quite the opposite. In some cases, 1990s publications by "precocious" ones try to blame renewal initiators and supporters as "unprofessional," "incompetent," "unscientific." Archive documents and personal memos need to be studied further.

[14] For example, M. I. Goldman, 'Perestroika,' in *Library of Economics and Liberty*, 2002. Available: http://www.econlib.org/library/Enc1/Perestroika.html (accessed 18 February 2010).

[15] B. Kaļķe, '*Pedagogs un ministrs Aldonis Builis (1930–2001)* [Pedagogue and minister Aldonis Builis (1930– 2001),' in A. Krūze (ed.), *Laikmets un personība* [Era and personality], vol. 10, Rīga, RaKa, 2008, pp. 268-290.

[16] A. Builis, *Mūsdienu skola* [Modern school], Rīga, Zvaigzne, 1985; A. Builis. *Skolvadības pamati* [Basics of school management], Rīga, Latvijas Universitāte, 1991; *Salīdzinošā pedagoģija* [Comparative pedagogy], Rīga, Latvijas Universitāte, 1992.

joint efforts, which embraced hundreds and thousands of those involved in the field of education.[17]

The decade of the fall of the Berlin Wall, collapse of the Soviet system and socialist regimes in Central Europe, and renewed independence and a clear turn towards the capitalist system in the Baltic states has been described as transitions in the economic and political spheres.[18] The process of educational renewal was viewed in 1993 as paradigmatic and cultural change;[19] in 1997 as a participation process,[20] curriculum development process,[21] and social change in a post-modern condition;[22] and as a political process by OECD experts in 2001.[23] Periodisation of educational renewal and explanations of each period were based on the above-mentioned texts and several master and three doctorate theses.[24] The main metaphors or key words of each period are stressed.

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[17] The middle-up-down/middle-down-up initiative and process by the theory of learning organisation and learning society. See P. Senge, *The Fifth Discipline. The Art and Practice of the Learning Organization*, New York, Doubleday, 1990; Y. Baiyin, K. E. Watkins, V. J. Marsick, 'The Construct of the Learning Organization: Dimensions, Measurement, and Validation,' *Human Resource Development Quarterly*, vol. 15, no. 1, 2004, pp. 31-56; S. Valdivielso, P. Belanger (eds.), *Emergence of Learning Societies. Who Participates in Adult Learning?* Oxford, Pergamon, 1997.

[18] M. Lauristin, P. Vihalemm, 'Recent Historical Developments in Estonia: Three Stages of Transition (1987– 1997),' in M. Lauristin, P. Vihalemm, K. E. Rosengren, L. Weibull (eds.), *Return to the Western World. Cultural and Political Perspectives on Estonian Post-Communist Transition*, Tartu, Tartu University Press, 1997, pp. 73-127; M. Lukšiene, 'Education and Culture', in M. Lukšienė, R. Bruzgelevičienė, V. Vaicekauskienė (eds.), *Educating for Freedom*, Vilnius, Alma Littera, 2014, pp. 29-75.

[19] P. Kreitzberg, *The Legitimation of Educational Aims*: *Paradigms and Metaphors*, Lund, Lund University, 1993.

[20] E.-S. Sarv, *Kümme aastat paradigmamuutust* [Ten years of paradigmatic change], Tallinn, Tallinna Pedagoogikaülikool, 1998.

[21] V.-R. Ruus, E.-S. Sarv, 'Changes in Estonian Curricula (1987–1999) and Some Thought on the Future,' in B. T. Beck, A. Mays (eds.), *Challenge and Change in Education: the Experience of the Baltic States in the 1990s,* New York, Nova Science Publishers, 2000, pp. 141-152.

[22] E.-S. Sarv, 'The "Condition of Postmodernism" and Changes in Estonian Education 1987–1997,' in A. Liimets, (ed.), *Integration und Integrativität als Probleme in der Erziehungswissenschaft,* Berlin, Wien, New York, Peter Lang, 2001, pp. 135-152; E.-S. Sarv, 'Political and Social Transformations – Analysis in the Estonian Context,' in H. Niemi (ed.), *Moving Horizons in Education. International Transformations and Challenges of Democracy,* Helsinki, Helsinki University Press, 1999, pp. 39-65.

[23] OECD, *Reviews of National Policies for Education: Estonia*, Paris, OECD, 2001. Reviews on Latvia and Lithuania show parallels in these processes in three countries.

[24] P. Kreitzberg, *The Legitimation of Educational Aims*: *Paradigms and Metaphors*, Lund, Lund University, 1993; V. Varik, 'Hariduspoliitika ja üldhariduskorraldus Eestis aastatel 1940–1991' [Policy of education and general education organisation in Estopnia 1940–1991], PhD diss., University of Tallinn, 2006; M. Oja, 'Muutused üldhariduskooli ajalooõpetuses alates 1987. aastast – nõukogulikust tänapäevaseks' [Changes in history teaching in general education since 1987 – from Soviet to modern], PhD diss., University of Tallinn, 2016; Candidate and MA theses by E. Silla, E. Veenpere, E.-S. Sarv, J. Veimer, K. Trahv, L. Jõumees, M. Kadakas, et al. Periodisation of Latvian education reform is explained also in this collection in the article by Aija Abens 'The Challenges of Teaching History in a Democracy: the Case of Latvia.'

1987–1989. Renewal was based on enthusiasm and wide public participation. It resulted in relative independence from Soviet educational institutions. Self-determination in the field of curriculum and organisation of general education meant a large amount of school-level decisions and participation by thousands of people in various forms of educational renewal, despite occasional misunderstandings and contradictions. The renewal process started with the Teachers' Congress on 26 March 1987, followed by brainstorming sessions, organisational development workgroups, project contests for national curricula and educational programmes, and re-establishment of a steering group by the ESSR Ministry of Education. All processes were at the grassroots level. In 1988, more than 20 secondary schools (of 203) took on the challenge of introducing a new "curriculum of branches"[25] of variations and choices. Here we can speak of "spontaneous" or "self-democratisation" of a large part of the educational system.[26] In 1989, the Estonian Education Platform[27] was created and approved at the Congress of Educators. Key concepts – democratisation, humanisation, and setting a high value on education – were highlighted. Estonian representatives supported the innovative, democratic developments of education taking place in Russia and cooperated intensely with Lithuanian and Latvian educators.

A Teachers' Congress took place in 1987 in Latvia, which was the beginning of a change in pedagogical thinking that focused now on democratisation, decentralisation, differentiation of curriculum and other issues.[28]

It is important to mention that in March 1987, the ESSR Ministry of General Education supported re-creation of national schools. Ministry leadership led the process at the highest level possible in Estonia and with the Soviet Central Committee of the Communist Party and Ministry of Education. Estonia was recognised as a "school-experiment" by the USSR Ministry of Education in the winter of 1987/1988.

Ants Eglon, former School Department Head at the Ministry of Education, admitted that education in the Estonia SSR "directly and specifically separated from the education policy of the Soviet Union in 1988/89 and went its own way." [29]

1989–1991. Attempts began to organize the education system, first on the government level, and to create conditions for a more-or-less stable

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[25] See in this collection: V. Rõuk, E-S Sarv, 'The Estonian National School Curricula – Becoming and Development.'

[26] E.-S. Sarv, '*Demokraatiast ja humanismist* õpetajale: *Eesti haridusuuendus – hariduse demokratiseerumine ja humaniseerumine*' [On democracy and humanism for teachers: Estonian educational renewal – democratisation and humanisation of education], Tallinn, Riiklik Eksami-ja Kvalifikatsioonikeskus, 1997.

[27] E. Karedam et al., *Main Principles for Reorganisation of the Education in Estonia,* Tallinn, Teacher In-Service Training Institute, 1989.

[28] A. Staris (ed.), *Pedagoğiskā doma Latvijā no 1940. gada līdz mūsu dienām. Antoloğija* [Pedagogical thought in Latvia from 1940 to the present day. Anthology], Rīga, Puse, 1998.

[29] 'Files of Ants Eglon,' 1992, Tallinn University Estonian Pedagogical Archives and Museum, K43010-3, p. 7.

educational system through necessary laws. Based on the principles developed during the previous period, foundations were laid for independent Estonia's laws and curriculum. Some private schools, including alternative and religious schools, emerged.

Changes in teacher pre-service training and professional development were mostly connected to 1) exclusion of ideologically-biased subjects, such as the history of Communist Party and including a 'new view of history', 2) rediscovering and acknowledging foreign and Estonian Republic's (1920–1940) educational science and practice (Johannes Käis, Hilda Taba, Peeter Põld, et al.), and 3) introducing new methods (active learning, andragogy). Learning and teaching foreign languages was developing quickly as exile Estonian teachers organized language lessons for local teachers.

Exile Latvians also played an important role in the development of Latvian education. The First World Congress of Latvian Scientists in Riga (1991) was attended by about 1000 Latvian scholars from Latvia and abroad. A section on Pedagogy and Psychology was included. The first World Conference of Latvian Educators was held in 1991; in subsequent years, it took place alternately in Münster, Germany and Latvia. These conferences were dominated by the joy of experimentation, shared by both practitioners and theorists. The added value from conferences, initiated and partly funded by Westerners, was the ability to sit down at one table and jointly search for new educational paths for Latvian scholars and teachers. In addition to exile Latvians, cooperation with foreign scholars – later Honorary Doctors of the University of Latvia – intensified in the late 1980s and early 1990s.[30]

Moscow-initiated leadership reform in education in 1988–1989 resulted in conflicts between "pro" and "anti" Moscow-minded higher officials, professors, and academicians in the field of education. This led to the "turbulence period" described in the article in this collection on curriculum development and paradigmatic change in Estonia.

To balance the uncertainty about national schools and centralisation of education management, further democratisation through wide grassroots initiatives continued the developments defined in 1987-88. These were school associations, subject associations, educational societies, etc.[31]

In June 1988, the Latvian Intelligence Forum also discussed issues of education. In May 1989, 4500 delegates participated in the Estonian Forum on Culture and Education. The Forum adopted a series of decisions and declarations on democratic development and governance in the field of education and culture and formed the Education Board (70 elected members)

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[30] See A. Krūze (ed.), *Laikmets un personība* [Era and personality], vol. 15, Rīga, RaKa, 2015, pp. 244-377.

[31] In 1988 and subsequent years, associations of interwar period were restored or new associations were established such as School-principals association – 1990 (393 principals), Education Society of Estonia – 1988, and the Bengt Gottfried Forselius Society – 1989.

as an advisory body for development of education and culture.[32] The Board had regular meetings and organised conferences and seminars. The Board worked until 1995 as an NGO for informal scientific, philosophical, and developmental negotiations and advised the government and society.

In Latvia in the late 1980s, the conflict between the Soviet legacy and the new demands of reforms intensified. In May 1990, Latvian minister of education Builis was replaced by the Popular Front activist Andris Piebalgs who was an experienced teacher and headmaster as well as employee of the Ministry of Education. Piebalgs was minister until August 1993, but later he choose a diplomatic career and became the first Latvia commissioner on the European Commission.

On 28 December 1990, the Ministry of Education published an order regarding reorganisation of research and methodological institutions of pedagogy including the Research Institute of Pedagogy, State Institute of Teacher In-service Training, Secondary Education Office (Cabinet), Vocational Education Office (Cabinet), and the Methodological Office (Cabinet) of Higher Education. The new Latvian Education Law was adopted on 19 June 1991. In March 1991, a new unit under the Ministry of Education and Science – Institute for the Development of Education – was established.[33] On 1 October 1991, the regulations 'On allocation of academic degrees' were adopted, and nostrification, or repeated recognition, of Soviet academic degrees began in Latvia.[34]

1992–1996. Restored independence resulted in the search for new, active relations on various levels – schools, local communities, and the state. In various institutions, parallel attempts were made to create curricula for pre-school, general and secondary education by former pedagogy specialists and to start theoretically-based national curriculum development by researchers of educational sciences, following the principles developed during the 1987–1988 processes.[35] In addition, attempts were made to adapt teacher training to Western models. The system of academic grades and titles was also re-arranged according to Western models. From 1989–1992, the Teacher-In-Service Training Centre and the Institute of Pedagogical Research closed. So, the well-established system of methodical consultation and life-long learning was disrupted at a time most difficult for practitioners. In Latvia, institutional changes had already been made.

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[32] E.-S. Sarv, 'Modernisation of Education in Estonia – a Brief Overview,' manuscript, 1993, Tallinn University Estonian Pedagogical Archives and Museum, K45204-9.

[33] A. Šmite, *Pedagoģisko darbinieku tālākizglītība Latvijā (1944–1990)* [Further education of teaching staff in Latvia (1944–1990)], Rīga, RaKa, 2015.

[34] Pedagogy Museum Collection of the University of Latvia.

[35] See article in this collection by V. Rõuk, E-S Sarv, 'The Estonian National School Curricula – Becoming and Development' and V.-R. Ruus, E.-S. Sarv, 'Changes in Estonian Curricula (1987–1999) and Some Thought on the Future', in B. T. Peck, A. Mays (eds.), *Challenge and Change in Education: the Experience of the Baltic States in the 1990s*, New York, Nova Science Publishers, 2000, pp. 141-152.

In 1992, the Estonian Law on Education was created by the Ministry of Education so that the stabilisation and reconciliation process could begin.

Open Estonia Foundation (OEF), founded on 19 April 1990 by George Soros, encouraged and supported development in Estonian society. Many initiatives and developments in the field of education were supported by OEF such as long-term projects 'School and Computer' and 'School with Distinction' for school leaders and school teams (started in 1993 with the motto "through development to openness"; 'Good Start' (Step-by-Step) for kindergartens (1994); 'Junior Achievement'; support of school reform (1994); and educational materials competitions. These were the most sustainable and influential projects and are still a natural part of the educational landscape, and 41% of all OEF finances went directly to education. The OEF had close contacts with sister organisations in Latvia and Lithuania where the Soros Foundation opened in 1992 and 1990 respectively.[36] There was Western and Nordic support for educational research, ICT training, and other projects[37] as well.

The 1990–1993 period is seen as an "educational policy vacuum" in Estonia by some researchers.[38] This did not mean there was a lack of ideas but rather a lack of procedures for democratic decision making and of reaching a shared understanding in collective undertaking.

All processes were strongly influenced by the fact that from 1988 to 1996, Estonian education administration structures were reorganized repeatedly.[39] Every reorganisation on the Ministry level meant reorganisation for central institutions dealing with educational research, teacher CPD, curriculum development, examination systems, etc. These disturbances meant losses in human and social capital and knowledge networks:[40] activists for renewal in educational science, CPD, curriculum development, methodological and education management/administration were often fired or moved to other positions

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[36] 'Avatud Eesti fond 1990–1995' [Open Estonia Foundation 1990–1995], pp. 11-19. Available: https://oef.org.ee/fileadmin/media/valjaanded/aastaraamatud/1990_1995.pdf (accessed 12 February 2018).

[37] R. Ruubel, 'Establishment of the Baltic-Nordic Network of Research and Development Centers on use of ICT in Teacher Training. Final Report, Estonia, 1999,' in Nordic Information bureaus in Tallinn, Riga, Vilnius and St. Peterburg (eds.), *Põhjala koostöö* [Nordic cooperation], Põhjamaade infobürood Tallinnas, Riias, Vilniuses ja Peterburis, 1998.

[38] P. Kreitzberg, *The Legitimation of Educational Aims: Paradigms and Metaphors*, Lund, Lund University, 1993, p. 5.

[39] 1988 – The Ministry of Education, the Ministry of Higher Education and Post-Secondary Technical Education, and the Vocational Education Committee (of Estonia SSR) were combined into one Education Committee of ESSR (following reorganisation in USSR). In 1989, the Education Committee was reorganised into the Ministry of Education to administer general, vocational, and higher education. 1993 – the Ministry of Culture and Education was established to deal with overall education policy, higher education, and science while the State School Board (*Riigi Kooliamet*) had to deal with general and vocational education. In 1996, the Ministry of Culture and Education and State School Board were reorganised and a separate Ministry of Education was re-established.

[40] For example, see a description of changes in this collection: V. Rõuk, E-S. Sarv 'The Estonian National School Curricula – Becoming and Development.'

and subject teacher networks lost traditional leaders (chief methodologists in STPDI, SIPR, inspectors in the Ministry of Education). As a result, strong non-governmental counter-movements arose that resulted in democratic initiatives such as the Estonian Education Society (1988), Estonian Council of Education (1989), and Estonian Forum of Education (1995).

To balance the turbulence in educational policy and higher leadership, initiatives arose to create professional and/or wider associations and organizations.

In April 1995, the Conference of Leaders of Education created an overview of developments in education and educational policies in the first years since regaining independence[41] and declared the need of an umbrella organization. The Estonian Forum of Education was founded on 25 October 1995 and has influenced the Estonian concept of education and educational strategy ever since. Undoubtedly, the development of the view of Estonia as a learning society and school as a learning organisation in 'Scenarios of Estonian Education – 2015' was the most important outcome in the 1990s.[42] On 24 March 1993, the Latvian Association of Educational Researchers was established and actively took part in the processes of change in the education system.

In 1996, the National Curriculum and the state exam system were legislated. The curriculum for pre-school institutions was adopted earlier.[43]

This was also an uncomfortable and depressing situation for teachers and academic staff. The recognition of Soviet era education diplomas (teacher qualification and academic degrees) within the new system was the subject of lengthy discussions, particularly in the Board of Rectors of Higher Education. Dozens of teachers wrote and defended their master's theses between 1990 and 1998 because they were unsure whether their Soviet diploma would qualify.

For similar reasons, the Master's programme in Pedagogy was implemented at the University of Latvia in 1992/93. Beside pragmatic considerations, pedagogues felt the need to improve their knowledge of pedagogy and psychology as their approach to the theory and methodology of education had changed – the basics of education no longer stemmed from the one "correct" philosophy, Marxism-Leninism. New academic knowledge and research skills were needed to obtain the degree of *Mg. paed*. International cooperation of academic staff introduced European experience into the curriculum. When choosing optional courses, students mainly picked those related to the formation

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[41] By this time, dozens of societies and teacher associations had emerged. See V. Jüriso, E.-S. Sarv (eds.), *Eesti poliitiline ja haridusmõte. Eesti hariduskonverentsi lisamaterjal* [Political and educational thinking in Estonia. Materials of the Education Conference], Tallin, Haridustöötajate Koolituskeskus, 1995.

[42] O. Aarna, *Haridusstrateegiline protsess Eestis ja Eesti Haridusfoorum* [Strategic process of Education in Estonia and the Estonia's Forum of Education], *RiTo* [The Journal of the Estonian Parliament], no. 11, 2005, pp. 33-40. Available: https://rito.riigikogu.ee/eelmised-numbrid/nr-11/haridusstrateegiline-protsess-eestis-ja-eesti-haridusfoorum/ (accessed 18 February 2018).

[43] See in this collection: Tiia Õun, 'Development of a National Curriculum for Pre-School Child Care Institutions in Estonia.'

of student motivation, value orientation and personality development, oratory skills, integration of psychology and physiology in the pedagogical process, and stress management.[44] Many Master's programme graduates became authors of textbooks or books published in the series 'Pedagogical Library' by RaKa (up to 10 books per year were published in this series) and articles published in the magazine *Teacher* (RaKa, 1996–2011) under the headings 'Changes in Education', 'Value Education', 'Word for the scholar' and 'Experience'.

In the 1990s, education as a whole was legislated: Republic of Estonia Education Act (1992), Preschool Children's Institution Act (1993), Basic Schools and Upper Secondary Schools Act (1993), Private Schools Act (1993), Vocational Educational Institutions Act (1995), and Universities Act (1995). These acts supported and built the educational system of the newly independent state: the division of tasks between state and local government was established, and clear requirements were set for activities of educational institutions.

1996–2004 was the period of preparation for EU membership and reorganisation of the educational system. Estonia, Latvia and Lithuania joined the Bologna Process and the Lisbon Strategy in preparation for EU membership. Both played an important role in the development of higher education and teacher training.

The Curriculum Center was established at the University of Tartu to organize the curriculum: the second version of the national curriculum and a simplified curriculum for students with learning difficulties was prepared with the participation of expert groups and the Education Forum in 2002.

At the turn of the new millennium, the thought of Estonia as a knowledge-based society and school/kindergarten as learning organisations became common.[45] The same approach developed in Lithuania.[46]

The above periodisation proceeded from the substantive organisational development of Estonian general education. A more general model of development has been presented by Elisabeth A. McLeich, who analysed the transition of education from authoritarianism to democracy in several countries.[47] A 5-phase model revealed a shift from authoritarianism to democracy in schools and classrooms and on the student-teacher level: authoritarianism, dissatisfaction with the situation anti-authoritarian climate and ideological collapse (pre-phase); uncertainty (phase I); national elections (national policy formulation, phase II); local elections (clarification of the nature of the future

[44] A. Krūze, 'Pedagoģijas maģistrs – radoša personība, humāns skolotājs, mērķtiecīgs pētnieks [Master of Pedagogy – creative personality, humane teacher, purposeful researcher], *Skolotājs* [Teacher], no. 5, 1997, pp. 15-17.

[45] E-S. Sarv, 'On Structure, Content and Typology of School Development Plans in Estonia,' in S. Priimägi, E-S. Sarv (eds.), *The Opening World: Changing Educational Environment and Teacher Training*, Tallinn, TPÜ kirjastus, 2002, pp. 78-105.

[46] See P. Jucevičiene, G. Merkys, G-B. Reinert (eds.), *Towards the Learning Society: Educational Issues*, Frankfurt, Peter Lang, 2002, p. 362.

[47] E. A. McLeish, 'Introduction. Processes of Educational Transitions in Countries Moving from Authoritarian Rule to Democratic Government,' in E. A. McLeish, D. Phillips (eds.), *Processes of Transition in Education Systems*, Wallingford, Symposium Books, 1998, p. 11.

education system, phase III); education code (macro-level transition, phase IV); and implementation at school level (micro-level transition, phase V). The story of Estonian educational innovation can also be described, more or less, using this model; for example, broad democratic involvement before macro-level changes and national education policy and formulation of education requests ahead of elections.

The Baltic triangle – similarities, influences, and cooperation

In general, the renewal processes were similar in Estonia, Latvia, and Lithuania. The active stage of educational renewal in Lithuania and Latvia began in 1988.[48] The national movements in all three countries saw national education as an important part of becoming truly independent, national countries. The change in political power and re-discovering history hidden under Soviet rule (Molotov-Ribbentrop Pact, mechanism and extent of deportations, etc.) meant that many leading educationalists who were required to be members of the communist party were seen as enemies or decided themselves to leave public and scientific life, even if they had been initiators of national movements and educational renewal in the 1980s. Others who had been active in the Soviet academic or/and political system revealed their previously hidden participation in the German army in an effort to show themselves as victims of the communist regime.[49] Critical analysis of personal memoirs published since the 1990s needs to be continued:[50] They reveal educationalists' personal tragedies and lies as well.

The period 1987–1991 has been called the Third Awakening in direct reference to Latvian, Estonian, and Lithuanian historical experience.[51] New curricula and outcomes, educational kits, textbooks, methodologies, and pedagogical alternative systems were introduced. Interpretation of changes in pedagogy

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[48] R. Bruzgelevičienė, *Lietuvos* švietimo *kūrimas 1988–1997* [Creation of education in Lithuania 1988–1997], Vilnius, Sapnų Sala, 2008, pp. 84-85.

[49] Without critical analysis of the role of individuals and their work through decades, it may be too superficial to reference those. This should be a matter of further research. Draft research is not yet finalised for publication.

[50] For more on memory research in Latvia published by the Social Memory Research Centre at the University of Latvia, see M. Kaprāns, 'Padomju laika sociālās reprezentācijas latviešu pēcpadomju biogrāfiskajā diskursā' [Social representations of Soviet era in Latvian post-Soviet biographical discourse], PhD diss., University of Latvia, 2012; M. Kaprāns, G. Strenga, N. Beckmann-Dierkes (eds.), *Atmiņu kopienas: atceres un aizmiršanas kultūra Latvijā* [Memory communities: A culture of remembrance and forgetting in Latvia], Rīga, Latvijas Universitātes Filozofijas un socioloģijas institūts, 2016.

[51] 'Restoration of the Republic of Latvia. 1987–1991,' National History Museum of Latvia. Available: http://lnvm.lv/en/?page_id=1027 (accessed 12 November 2019); J. Orn, 'Sada aastat Kasvatuse ja Hariduse ilmumisest' [One hundred years since the publication of the Education and Upbringing magazine], *Õpetajate Leht* [The Teachers' Newspaper], 27 January 2017. Available: http://opleht.ee/2017/01/sada-aastat-kasvatuse-ja-hariduse-ilmumisest/ (accessed 18 February 2019).

was done using metaphors (constructs) such as borrowing and lending (Iveta Silova,[52] Gita Steiner-Khamzi[53]) and translation (Ene-Silvia Sarv[54]).

We can see remarkable changes in social and professional capital in the field of education in all Baltic countries that was sometimes accelerated by political ambitions of newly-founded political parties.

It was important to underline the interaction and support in educational renewal among progressive forces in Baltic Republics from 1987 on through cooperation between the National Awakening movements, Teacher In-Service Training Institutes, Institutes of pedagogical research and/or initiative groups of educational renewal, teacher organisations, university faculties, and others. In *Sajūdis*, Meilė Lukšienė and her co-workers in educational institutes actively learned from each other. Ramutė Bruzgelevičienė underlined that "the ideas of the progressive Estonian education reform … were taken into consideration."[55] An important event was the meeting of reform initiative delegations in Jūrmala, Latvia where the Baltic Council of Education was initiated. Estonian participants included future minister of education and parliament member Professor Peeter Kreitzberg and vice director of Teacher In-service Institute Ene-Silvia Sarv. Teachers, researchers, and opinion leaders from Latvian and Lithuanian ministries were represented as well. The next steps, in Tallinn, were the compilation and assignment of the main concepts of education renewal worked out by the Baltic Education Council (1988–1989)[56] and the creation of a moral codex for the teacher/pedagogue. *Dr. habil. phil.* Augusts Milts from Latvia compiled the Teacher Code of Ethics.[57]

Baltic educators were also active in the All-Union pedagogical movement and supported the democratic wing of educationalists. From 20-22 December 1988, the All-Union Teachers' Congress was held in Moscow. The battle between new democratic and totalitarian factions in education was ongoing. The most radical programmes were presented by Lithuania and Estonia. The published

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[52] I. Silova, 'Rediscovering Post-Socialism in Comparative Education,' in I. Silova (ed.), *Post-Socialism is not Dead: (Re)Reading the Global in Comparative Education*, Bingley, Emerald, 2010, pp. 1-24.

[53] G. Steiner-Khamsi, F. Waldow (eds.), *World Yearbook of Education 2012. Policy Borrowing and Lending in Education*, London and New York, Routledge, 2012.

[54] E-S. Sarv, 'Post-Socialist Transformations in Education as Translation (the Estonian Case),' paper presented at European Conference of Educational Research (ECER), Berlin, Germany, 2011. Available: https://slideplayer.com/slide/13038213/ (accessed 11 February 2019).

[55] R. Bruzgelevičienė, *Lietuvos švietimo kūrimas 1988–1997* [Creation of education in Lithuania 1988–1997], Vilnius, Sapnų Sala, 2008, p. 341.

[56] Personal archives and photos of E.-S. Sarv; R. Bruzgelevičienė, *Lietuvos švietimo kūrimas 1988–1997* [Creation of education in Lithuania 1988–1997], Vilnius, Sapnų Sala, 2008, pp. 84-85.

[57] A. Šmite, *Pedagoģisko darbinieku tālākizglītība Latvijā (1944–1990)* [In-service education of teaching staff in Latvia (1944–1990)], Riga, RaKa, 2015.

version of resolutions[58] differed from the negotiated and adopted text.[59] Lithuania and Estonia protested this in the central newspapers and *Uchitelskaya Gazeta* (Teacher Gazette).

There are similarities in the central principles of educational renewal in all three countries:

- human value (humanisation of education) and parents' rights to choose their children's educational path,
- democratic values,[60]
- preservation of national cultural heritage,
- need for society, educational institutions in particular, to be open to change, and
- power of new ideas.

While these principles were not unique to education in western democracies, these represented significant change in nations that emerged from Soviet centralist rule. Ideas for possible alternatives in education (non-mainstream education and private schools) emerged in all three countries.

Kreitzberg and Sirje Priimägi noted that considerable tension existed between policy makers, many of them part of a government bureaucracy still influenced by the former Soviet model, and practitioners who were anxious for change and the opportunity to develop a new and dynamic educational system.[61] A new democratic model being formed in Lithuania[62] influenced Estonian leading educational reformers and vice versa.

The main educational principles were similar in Estonia and Lithuania. Since 1988, these have included and continue to include humaneness, democracy, and nationhood. Cultural aspects were central in curriculum, as was fostering a democratic society in school culture. The paradigm change became a reality.[63] Judging by Latvian educational press, the guiding principles in education were learning culture and democracy, harmonisation of reforms and foreign experience with Latvian identity and national values, activisation

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[58] L. Tupikiene, interview by A. Ruubel, 'Leedu nõuab rahvuskooli' [Lithuania requires national school], *Haridus,* no. 3, 1989, pp. 21-22; R. Bruzgelevičienė, *Lietuvos* švietimo *kūrimas 1988–1997* [Creation of education in Lithuania 1988–1997], Vilnius, Sapnų Sala, 2008, pp. 311-313.

[59] This was the echo of contradictions in central political, pedagogical, and academic circles. *Uchitelskaya gazeta* [Teacher's Gazette] was "the *perestroika* minded."

[60] Democracy as a lifestyle, not just a political idea and practice.

[61] P. Kreitzberg, S. Priimägi, 'Educational Transition in Estonia, 1987–1996,' in P. Beresford-Hill (ed.), *Education and Privatisation in Eastern Europe and the Baltic Republics,* Wallinfgord, Triangle, 1998.

[62] The model was developed further by the Education Reform Council of the Lithuanian SSR – the first self-governance entity of the national level for education reform in Lithuania. R. Bruzgelevičienė, *Lietuvos* švietimo *kūrimas 1988–1997* [Creation of education in Lithuania 1988–1997], Vilnius, Sapnų Sala, 2008, p. 341.

[63] D. Kuolys, V. Vaicekauskienė, 'Introduction,' in M. Lukšienė, R. Bruzgelevičienė, V. Vaicekauskienė (eds.), *Educating for Freedom*, Vilnius, Alma Littera, 2014, pp. 20-21; R. Bruzgelevičienė, *Lietuvos* švietimo *kūrimas 1988–1997* [Creation of education in Lithuania 1988–1997], Vilnius, Sapnų Sala, 2008, p. 341.

of the learning process, selection of practical knowledge, and development of the child's individuality.[64] In 1989, Meilė Luksiene and her group announced the National School Concept with a strong cultural aspect and cultural meaning for education, central in Lithuanian reform ever since.[65]

Educationalists accentuated that use of market models can diminish the humanistic role that education should play in a free society. The Estonian Platform of Education stressed that education should imbue people with all the values and aspirations expressed in the saying "man does not live by bread alone."[66]

Private and/or alternative education sector regulations emerged as a relatively new item on the agenda of both educators and policymakers in all three countries.[67]

In all Baltic Republics, another process emerged: Russian-speakers, including teachers, became a minority after half of century of being the majority and representing the "older brother." This was a painful process for many, and finding a new identity was not always successful. Some teachers felt connected to Russia, Russian media, and the Russian/Soviet interpretation of history.[68]

Perestroika and re-gaining of independence in particular caused the rebirth of national schools and compulsory education in the titular nation's language. Edgar Krull underlines this ideal in connection of re-creation of citizenship and national values.[69] The return to religion, as part of national values, was strong in the early 1990s but only remained so in Lithuania. In Latvia, the Christian school movement became active thanks to enthusiasts. After the 1988 Popular Front of Latvia Congress, the issue of Christian education was raised. Pastor

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[64] I. Ķestere, 'Traditional and Modernity in the Schools of Latvia during the Periods of National Independence,' in A. Krūze et al. (eds.), *Pedagogy in the Changing Historical Conditions in the 20th Century in the Baltic countries*, Riga, RaKa, 2009, pp. 290-303.

[65] See P. Juceviciene, 'Educational Science in Lithuania: From Yesterday to Tomorrow,' in S. Sting, C. Wulf (eds.), *Education in a Period or Social Upheaval. Educational Theories and Concepts in Central East Europe*, Münster, Waxmann, 1994, p. 44; M. Lukšienė, 'Pedagogy and Culture,' in M. Lukšienė, R. Bruzgelevičienė, V. Vaicekauskienė (eds.), *Educating for Freedom*, Vilnius, Alma Littera, 2014, pp. 34-58.

[66] E. Kareda, et al., *Main Principles for Reorganisation of the Education in Estonia,* Tallinn, Teacher In-Service Training Institute, 1989, pp. 12-13.

[67] P. Jucevičienė, J. Taruskienė, 'Privatisation in the Light of Educational Reform in Lithuania,' in P. Beresford-Hill (ed.), *Education and Privatisation in Eastern Europe and the Baltic Republics,* Wallinfgord, Triangle, 1998, pp. 22-34; N. Kersh, 'Aspects of the Privatisation of Education in Latvia,' in P. Beresford-Hill (ed.), *Education and Privatisation in Eastern Europe and the Baltic Republics*, Republics, Wallinfgord, Triangle, 1998, pp. 35-46; P. Kreitzberg, S. Priimägi, 'Educational Transition in Estonia, 1987–1996,' in P. Beresford-Hill (ed.), *Education and Privatisation in Eastern Europe and the Baltic Republics*, Wallingford, Triangle, 1998, pp. 47-59.

[68] R. Andersone, I. Kestere, L. Rutka, 'National Minority Education: Historical Experience and Contemporary Issues of Latvia,' Series 'Pedagogical and Historical Sciences,' vol. 127, 2015, pp. 254-275.

[69] E. Krull, 'Integration of Soviet Migrants as a Factor Shaping Identity and Citizenship Awareness in Estonia,' in A. Ross (ed.), *Learning for Democratic Europe, Proceedings of the Third conference of the Children's Identity and Citizenship in Europe Thematic Network*, London, CiCe publication, 2001, pp. 261-267.

Juris Rubenis and the head of Sunday schools Vera Volgemute contributed, and by the end of 1989, 100 Sunday schools and training courses for Sunday school teachers had been organized. Latvian Radio broadcasted the programme 'Sunday School.' In the autumn of 1991, Christian School No. 1 in Riga opened under the guidance of Volgemute. Several schools in Riga and Latvia adopted this school model. In 1995, Riga Christian School No. 1 was admitted to the World Association of Christian Schools. However, as in Estonia, the activity of Christian schools declined.

During this time, it is clear that educational renewal widened its interpretation: in 1987–1988, the positivist Soviet view of education began to (self) democratise in the 1990s, as did society through the processes taking place in education.[70] The same conclusions were reached by Meilė Lukšienė and Ramutė Bruzgelevičienė,[71] although the basic ideas of Lithuanian educational renewal were slightly different from those of Estonia.

Main ideals in Estonia – national school, democratisation and humanisation of education

The aims of the initial stage of educational renewal (1987–1989) originated from at least four sources:

1. Wide educational experience of teachers and other stakeholders formed a field of problems at the Organisational Developmental Game/Bees on 12-13 May 1987 with 180 participants;
2. "Learned experts" – researchers and specialist of education from academic institutions, including Pedagogic Academy of USSR academician Heino Liimets;
3. Pedagogic memory – traditional values from pre-Soviet and Soviet era; and
4. Best practices from Estonia and from the USSR.

All four constituted the wholeness and were interpreted and adapted to fit into the terms of *perestroika*. In this case, the main "translator" was innovative bureaucracy of the Ministry of Education and Minister Elsa Grechkina. Significantly, the first books on educational renewal were purposefully published in Russian[72] to convince Moscow that this was based on perestroika, transparency, and innovation. For Estonians, this seemed wrong and moreover, caused Russia, Latvia, and Lithuania to adapt to these ideas more willingly

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[70] E.-S. Sarv, *Kümme aastat paradigmamuutust* [Ten years of paradigmatic change], Tallinn, Tallinna Pedagoogikaülikool, 1998, pp. 18-19.

[71] R. Bruzgelevičienė, *Lietuvos* švietimo *kūrimas 1988–1997* [Creation of education in Lithuania 1988–1997], Vilnius, Sapnų Sala, 2008, p. 341; R. Bruzgelevičienė, V. Vaicekauskiene (eds.), *M. Lukšienė. Educating for Freedom*, Vilnius, Alma littera, 2014.

[72] For example: E. Gretchkina, H. Liimets (eds.), *Na puti k novoi* škole *I*: Škola *Estonskoi SSR v obnovlenii* [On the way to a new school I: the school of ESSR in renewal], Tallinn, ENSV Pedagoogika Teadusliku Uurimise Instituut, 1987. It included also the vision of foundations for future national curricula.

than Estonians. The references in those books reveal materials on perestroika from the Central committee of Communist Party and resources from Estonian educationalists (foreign literature on education was virtually non-existent in public libraries).

The general issues raised in these first books were about the need for *perestroika* in the education system of education the kinds of changes needed and desired. The short answer stressed full socialisation of youth, readiness to adapt in a changing social environment and cope in the personal sphere, and readiness to find creative and socially relevant solutions for problems of (Estonian) society and of personal life.[73]

Main principles for Reorganisation of the Public Education in Estonia[74] was created by a small think-tank under the direction of Kreitzberg. The first chapter gave a short analytical overview of painful issues as a starting point for renewal. The main text was essentially an introduction, a "translation" of advanced ideas from around the world in the Estonian context. Background knowledge was derived from knowledge creation processes of 1987–1988 and from works such as John Dewey's *Democracy and Education* and James Botkin's *No Limits to Learning: Bridging the Human Gap. A Report to the Club of Rome.* At the time, those books were borrowed from Finnish friends and brought to Estonia secretly!

Main principles for Reorganisation covered all fields of education, teacher training, professional development, and education management. The three main lines of educational development – democratisation, humanisation, and setting a high value on education[75] – were widely accepted by the Estonian educational community.

Kreitzberg, Sarv, and Silla[76] showed that the content and meaning of the words of humanisation and democratisation changed substantially. In 1987–1988, these were rather one-dimensional, a metaphor, and the user had only a vague, ideal picture because of a general lack of actual democratic experience. However, meaning and understanding quickly developed, due to unrestricted access to Western literature and, first and foremost, cooperation and extensive joint activities. A wide range of people were engaged in the undertaking with notable synergy achieved on many occasions. Today we would call this

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[73] E. Gretchkina, H. Liimets (eds.), *Na puti k novoi* škole I: Škola *Estonskoi SSR v obnovlenii* [On the way to a new school I: the school of ESSR in renewal], Tallinn, ENSV Pedagoogika Teadusliku Uurimise Instituut, 1987, p. 8.

[74] E. Kareda et al., *Main Principles for Reorganisation of the Education in Estonia,* Tallinn, Teacher In-Service Training Institute, 1989.

[75] Ibid, p. 12.

[76] P. Kreitzberg, *The Legitimation of Educational Aims: Paradigms and Metaphors*, Lund, Lund University, 1993; E.-S. Sarv, *Kümme aastat paradigmamuutust* [Ten years of paradigmatic change], Tallinn, Tallinna Pedagoogikaülikool, 1998; E. Silla, 'Haridusuuendus rahvusvahelise kogemuse kontekstis Eesti praktika näitel' [Educational change/renewal in the context of international experience on the example of Estonian practice], Thesis, Tallinn Pedagogical University, 2002, pp. 27, 57, 112.

a grassroots process. In 1987–1990, humanisation and democratisation were not just keywords and aims; they were something practical – a method for renewal.

Neopositivist/alternative practices

A question of the popularity of non-mainstream educational/pedagogical systems and programmes (Waldorf, Montessory, Freinet, Christian education, etc.) in post-Soviet societies remains. Perhaps it was because teachers, not theorists, introduced them. "Alternative teachers" visited Estonia, Latvia, Lithuania, Russia, and other countries at the height of the emotional stage of social rebirth. These teachers presented another approach to children, to the overall process of education, and to the teacher themselves. They seemed to be in harmony with the ideals of participatory democracy and humanism as well as being open towards religious beliefs and values.

In an attempt to negate subject-centeredness and stress child-centeredness, Estonia had developed six Waldorf schools (with 300 children), a private International Baccalaureate school, private Catholic school, some Montessori kindergarten groups, and Freinet-based pedagogy by 1992. Hundreds of teachers participated in alternative pedagogy courses: some were private initiatives, others were organised in the Teacher In-service Institute, and some took place in the teachers' schooling centre. The International Seminar on Humanist/Waldorf education "The Threshold" operated from 1992 to 2002 in Estonia and drew more than one hundred participants from Latvia, Lithuania, Russia, and Ukraine. The teaching team was international (Finland, Sweden, United Kingdom, Germany, Estonia, Latvia) and included practitioners alongside teacher trainers and theorists. The experience and knowledge gained through alternatives enriched the pedagogical "toolbox" of all participants and initiated cooperation and knowledge exchange on the school-level among different countries.[77] These led to significant changes in public opinion and education laws.[78]

The 1990s was an era of alternative schools and kindergartens in all three Baltic states that widened educational world-views and practices and enriched the repertoire of mainstream pedagogues.

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[77] E.-S. Sarv, 'Mõnest alaprobleemist' [Some underlying problems], in *Demokraatiast ja humanismist* õpetajale: *Eesti haridusuuendus – hariduse demokratiseerumine ja humaniseerumine* [On democracy and humanism for teachers: Estonian educational renewal – democratisation and humanisation of education], Tallinn, Riiklik Eksami- ja Kvalifikatsioonikeskus, 1997, pp. 63-68.

[78] J. de Groof, G. du Plessis, M. Smirova (eds.), *Religion, Law and Education; Tensions and Perspectives*, Oisterwijk, Wolf Legal Publishers, 2017, p. 186.

Conclusion

The metaphorical question put forth in the introduction is: Was the renewal of education a way or a chain? The way, a path, implies branching off and intersection with other paths, even if the general direction was certain. And a chain is only as strong as its weakest link, says the Estonian proverb.

Views from outside and inside may indicate the same results. However, the anatomy and motives of events and processes are often perceived differently and interpreted in the context of culture, experience, and views.

In general, the Estonian path from Soviet school and educational paradigm to Estonian national school and concept of national education had, despite all political and organisational turbulence, some specific characteristics: grassroots participation by teachers;[79] a strong visionary approach as indicated in the adoption of laws and regulations; existence of professional and informal associations; and influential political leadership.

Many years later Olav Aarna[80] wrote:

The development of educational strategic thinking and the process in Estonian education can be divided as the period of naive idealism (1988–1990), the development and implementation of the first-generation Education Law (1990–1995), and the maturation of concept of a learning society (1995–2000) ... One of the basic ideas for educational innovation was self-development of education. This road would expect a balance between state institutions (Ministry of Education, Committees, departments, etc.) and social entities (education councils, subject teachers' associations, etc). Unfortunately, this balance did not occur. The documents adopted at the conferences of educators, including the Education Platform and the documents of the Cultural and Education Forum (1989), were an expression of an attempt to reach a social agreement. But in an undeveloped democracy, they would have demanded an institutional outlet. Institutional output arose only partially in the form of laws, regulations and directives. Educational ideals formulated in 1987–1989 did not develop into a national educational policy. [81]

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[79] Generation/creation/adaptation of new programs and learning kits for national school curriculum on the school level – for free subjects and courses, new subjects, humanities, real/natural sciences, social or/and practical branches in school (since 1988/89 in schools where the decision was done for school-experiment. The number of such schools increased year by year.); teacher professional activities, research and subject associations/societies, etc.

[80] Olav Aarna – Academician of the Estonian Academy of Sciences, Founder Member of the Estonian Education Forum (1995) and Chairman of the Board; Member of parliament (2003–2007), Rector of Tallinn Technical University and of Estonian Business School.

[81] O. Aarna, 'Haridusstrateegiline protsess Eestis ja Eesti Haridusfoorum' [Strategic process of education in Estonia and the Estonia's Forum of Education], *RiTo* [The Journal of the Estonian Parliament], no. 11, 2005, pp. 33-40. Available: https://rito.riigikogu.ee/eelmised-numbrid/nr-11/haridusstrateegiline-protsess-eestis-ja-eesti-haridusfoorum/ (accessed 12 September 2019).

Kreitzberg saw education renewal as an experiment in participatory democracy,[82] reflecting the renewal process and outcomes.

Although the majority of definitions were unanimous, opinions concerning further development varied to such an extent that summing them up turned out to be an impossible task. In essence, various educational policy visions began taking shape, with greater or smaller stress on liberalism, conservatism, or social democracy. At the same time, participants acquired significant experience in the ups and downs of participatory democracy and later about how simple it was to liquidate participatory democracy. In all transition countries, changes met with strong, at times quite dramatic resistance. Resistance did not happen through open rhetoric, which quickly emerged as general usage keywords such as 'democratisation of education,' 'school autonomy,' 'national upbringing,' 'humanisation,' 'pluralism,' etc. Wide participation was rejected in what, according to Foucault,[83] could be called a parallel regime of knowledge/power. These changes restored the preferences, the social standing, and professionalism of the people who had been making decisions in education. On the one hand, this excluded making "raw" decisions, but on the other hand, it also excluded a large proportion of active participants.[84]

After one year of participatory democracy practice and reorganisation of the Estonian Ministry of Education, curriculum and law reforms were applied to specialists in 1988. Accusations of making educational decisions in the silence of ministerial offices began. Gone was the dynamic of educational renewal and the enthusiasm of so many participants.

The wave of wide participation in educational renewal in 1987 was indeed a rare phenomenon in all of Europe. In 1988, the Ministry of Education, in cooperation with the general public, compiled an educational platform in order to agree on common goals. The three main stresses were on democratisation of managing education, making it learner-centered, and making it valued. These three main points have played an indirect part in Estonian education ever since.

By 1997, Estonian Education Law, National Curriculum, and the structure of educational institutions were generally established, as it was also in Latvia and Lithuania. The national systems of education became a reality.

The 2000s brought deeper physical, organizational, and paradigmatic interplay with the European education space through exchange, conferences, adaptations, etc. It might be possible, that despite borrowing, translating, or legislating educational "otherness," a symbiosis of different approaches appeared, at least in the practice of good and innovative teachers and schools. Today's advantage is the internationalisation of education and research with opportunities to learn from the experience of the world for better integration

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[82] P. Kreitzberg, 'Estonian System of Education', manuscript, 2000, Personal archives of E.-S. Sarv.

[83] M. Foucault, 'The Subject and Power,' in H. Dreyfus, P. Rabinow (eds.), *Beyond Structuralism and Hermeneutics*, 2nd ed., Chicago, The University of Chicago Press, 1983, pp. 208-226.

[84] P. Kreitzberg, 'Estonian System of Education', manuscript, 2000, Personal archives of E.-S. Sarv.

into the joint European space of education and science, by presenting Baltic traditions and values there.

In general, we can see that the main striving towards 21ˢᵗ century education was present in the idealistic picture of educational renewal in Estonia, Latvia, and Lithuania. The Delors report[85] proposed an integrated vision of education based on two key concepts: life-long learning and the four pillars of education – to know, to do, to be, to live together. Moreover, it considered the holistic approach – the formation of the whole person – to be an essential part of education's purpose. We found these key words in all programmes and concepts of education on the path all three Baltic countries have been taking since 1987.

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[85] J. Delors et al., *Learning: the Treasure within: Report to UNESCO of the International Commission on Education for Twenty-first Century,* Paris, UNESCO Publishing, 1996.

Chapter I

Breaking the System: Institutional Changes

Changes in the Network of Estonian General Education Schools

Veronika Varik

Abstract. After the restoration of independence, the fate of small schools became a topical issue in Estonia. The structure of the school network is an important factor in making education accessible, and any alteration can lead to a direct impact on people's daily lives – whether it be in the form increased school travel time when a local school is closed down, diminished access to education, loss of a regional centre and many jobs, or, more positively, a new-found sense of regional perspective when a new school is opened. This paper aims to provide an analytical overview of the changes in the Estonian general education network that were driven by four main factors: declining birth rate, population relocation (peri-urbanisation), educational policy, and economic development. The methods used in this theoretical study are textual analysis and source criticism. Changes in the school network are analysed by drawing on national statistics, legislative acts, and published and unpublished materials. Given that the national governments from 1990–2004 had no uniform plans for developing the school network, two countervailing tendencies could be observed: preserving the *status quo* and unmanaged development. The first tendency strove to maintain the existing population and spatial structures whereas the second was expressed in the actions of the schools themselves, leading to an increasing gap between strong and weak schools and school administrators. Preserving the *status quo* was not favoured by the per-student funding model. However, a drastic consequence of unmanaged development was (due to the demographic situation and opportunities for optimisation) that the problems with schools gradually resolved themselves on a case-by-case basis (i.e., students and teachers first trickled and then poured out from certain regions). During this period, regional differences between schools became more pronounced and economic stratification led to educational stratification.

Keywords: general education schools, school network, demographic trends, educational policy

Introduction

The development of the school network in newly-independent Estonia was significantly influenced by Soviet education policy trends and principles, which envisaged a transition to compulsory secondary education (grades 1–11). In particular, this comprised the reorganisation of the school network in rural areas: the concentration of agricultural production on large-scale state farms had led to the growth of new settlements. Thus, the collapse of the Soviet system meant that several regions saw a decline in student numbers: many schools were either reorganized or closed and students were redirected to basic and secondary schools in rural and urban centres.

In addition to economic and demographic factors and education policy trends, the development of the school network was also affected by attitudes of the general population. In the transitional society of post-Soviet Estonia, parents began to re-assess the significance of elementary education: it truly became the first step in the future careers of their children. Small rural schools became less credible as guarantors of good education in the eyes of society. Accordingly, the number of students in small schools dropped.

After Estonia regained independence, its education policy officials were faced with a complex dilemma – management with limited financial and material resources or maintenance of the role of schools as engines of regional development. Steadily decreasing birth rates and intensified relocation to areas with better opportunities for living, working, or raising children meant that the small rural schools that had survived the industrialisation and urbanisation craze of the 1960s–1970s remained very much under threat in the 1990s.

Neighboring countries (Latvia and Finland)[1] faced similar demographic trends in the 1990s and also needed to reorganize their school networks. By restructuring its school network, Estonia tried to align the study places and conditions with these demographic changes, keeping in mind actual financial capacity.

This paper aims to provide an analytical overview of the changes in the Estonian general education network that were driven by four main factors: declining birth rate, population relocation (urbanisation), educational policy, and economic development. The methods used in this theoretical study are textual analysis and source criticism. Changes in the school network were analysed by drawing on national statistics, legislative acts, and published and unpublished materials.

Demographic trends and the school network

Demographic trends have had a profound effect on the school network. Since the 1990s, Estonia has undergone a population decline. From 1989 to 2000, the population of Estonia decreased by approximately 200 000 (1 565 662 in 1989 to 1 370 052 in 2000). This was due to natural population decrease – especially in the first half of the 1990s – and emigration. The latter was primarily prompted by the collapse of the Soviet occupation, after which a large number of military personnel and employees of Soviet All-Union enterprises left the country. The birth rate dropped from 24 000 in 1989 to 12 000 in 1998. Only in 1999 was the number of births in Estonia slightly higher than the previous

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[1] *Reviews of National Policies for Education, Latvia*, OECD, 2001, pp. 65-66. Available: http://dx.doi.org/10.1787/9789264192478-en (accessed 14 July 2017); J. Vasama, 'Koolivõrk, Soome kogemus' [School network, Finnish experience], manuscript, 2005, Tallinna Ülikooli Eesti pedagoogika arhiivmuuseum [Tallinn University Estonian Pedagogical Archives and Museum], K42490-7.

year, reversing the trend of the previous 11 years. Growth continued from 2000 to 2020.[2]

The number of students in general education schools began to decrease in 1999. From 1999 to 2004, the number of students in general education schools fell by approximately 15% (31 890 students). Up to 1998, 22 000–23 000 students began first grade annually; from 2001 to 2004 this number remained stable at 13 000. Although the majority of children studied in larger cities, the share of day students in rural schools increased by approximately 4% (from 23.8% in 1990 to 27.6% in 2004).[3]

The demographic situation differed from region to region due to a number factors, not the least of which was geography. The collapse of the Soviet Union and its collective farm system and changes in the structure of the economy and its development concentrated the population in cities and peri-urban settlements. Demographic changes were less negative in larger cities and their immediate surroundings. In certain regions, the process of urbanization resulted in a shortage of kindergarten spaces and a lack of pupils in schools. Problems were most severe in small towns and peripheral regions: the demographic situation in rural municipalities was greatly influenced by their position on the center-periphery axis, i.e., their geographical distance from larger cities. Due to the decreasing numbers of students, many municipalities had to restructure their school networks. In addition to demographic factors and migration, the structure of the school network was determined by education policy trends and decisions at the national and municipal levels.

Education policy and the school network

The network of Estonian general education schools was decentralized in 1990. With the Local Government Organisation Act (1993), the responsibility for educational institutions was passed from the state to municipal governments,[4]

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[2] M. Servinski, Ü. Valgma, B. Hänilane, M.-L. Otsing, 'Rahvastiku paiknemine ja rahvaarv' [Population and distribution of population], in T. Rosenberg (ed.), *Pilte rahvaloendusest* [Census snapshots], Tallinn, 2013, pp. 9-22. Available: http://www.digar.ee/arhiiv/et/raamatud/55227 (accessed 3 July 2017); 'Noppeid ajaloost, Sündimus' [Scrolls from history, Birth rate], Statistikablogi, Statistikaameti ajaveeb [web blog], 13 July 2016. Available: https://statistikaamet. wordpress.com/tag/sundimus/ (accessed 3 July 2017).

[3] B. Aaviksoo, 'Väikekoolide sulgemine haridusõiguse piirajana, Piirangu kooskõla Põhiseadusega, Analüüs' [Closure of small schools as limiting educational rights. Convergence of the limiting with the Constitution. Analysis], manuscript, 2001, Archives of the Office of the Legal Chancellor of the Republic of Estonia, p. 15; *Ülevaade üldharidusest 2001–2005* [Overview of general education 2001–2005], Tartu, Haridus- ja Teadusministeerium, 2005, p. 14. Available: http://dspace.ut.ee/bitstream/handle/10062/40907/Uldharidus_2001_2005.pdf? sequence=1&isAllowed=y (accessed 11 July 2017); 'Statistikaamet, Statistika andmebaas, Üldharidus' [Statistical Office, Database of Statistics, General Education]. Available: https:// www.stat.ee/andmebaas (accessed 11 July 2017).

[4] 'Kohaliku omavalitsuse korralduse seadus (1993)' [Local Government Organisation Act (1993)], *Riigi Teataja* [State Gazette], vol. I-37, no. 558, 1993. Available: https://www.riigiteataja. ee/akt/28501 (accessed 9 June 2017).

including responsibility for facilities and school staff. Most schools for special educational needs children continued to be administered by the state (34 out of 50 in 1994).[5] Although the number of general education schools steadily grew in the second half of the 1980s, there was a surge from 1990 to 1995: the number of schools (mainly primary and basic schools) increased from 641 to 742. On the one hand, the disappearance of large collective farms in rural areas required smaller and geographically closer schools. Emerging small farms and local businesses brought places of work nearer to home. On the other hand, the dramatic increase in the number of schools has been linked to a particular mentality of the 1990s: the newly-independent state wanted to compensate for Soviet-era closures of small schools by building new ones, all the while failing to foresee the imminent decline of rural life and the sharp decrease in births. The number of general education schools continued to grow until 1995 and then began to dwindle.[6] In addition to the falling birth rate, another decisive factor in the closing of small schools was the education policy.

In 1993, Estonia adopted a per-student based funding model for general education schools.[7] According to this model, the amount of resources allocated to a municipality for teacher salaries and training fees, textbooks and investments was linked to the total number of students who attended school in that municipality, regardless of the number or level of schools.[8] One of the aims in adopting this model was increased control of the school network because lax government control in the early 1990s resulted in relatively unchecked development, and the number of small schools soared. The per-student funding model gave larger schools a competitive advantage: the annual budgets of small schools with low student numbers could not meet their actual needs because they had utilities and administrative expenses similar to those of larger schools.

The market economy infiltrated education and pushed schools to compete for pupils. One important regulatory mechanism facilitating this was a provision in the Basic Schools and Upper Secondary Schools Act (1993), allowing parents

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[5] V. Neare, 'Eripedagoogika probleemid haridusametniku pilgu läbi' [Problems of special education through the eyes of an educational officer], in *Eesti puuetega laste koolid* [Schools for children with disabilities in Estonia], Tallinn, Eesti Eripedagoogide Liit, 1994, p. 9.

[6] B. Aaviksoo, 'Väikekoolide sulgemine haridusõiguse piirajana, Piirangu kooskõla Põhiseadusega, Analüüs' [Closure of small schools as limiting educational rights. Convergence of the limiting with the Constitution. Analysis], manuscript, 2001, Archives of the Office of the Legal Chancellor of the Republic of Estonia, p. 15; V. Varik, 'Hariduspoliitika ja üldhariduskorraldus Eestis aastatel 1940–1991' [Educational policy and organisation of general education in Estonia during 1940–1991], PhD diss., University of Tallinn, 2006, p. 188; 'Statistikaamet, Statistika andmebaas, Üldharidus' [Statistical Office, Database of Statistics, General education]. Available: https://www.stat.ee/andmebaas (accessed 9 January 2017).

[7] The number of students attending schools in a given municipality is used to calculate the amount of state subsidies allocated to that particular municipality. Funding is "bound" to students and "moves along" with them in case they relocate or switch schools. The subsidy is used to cover teacher salaries, social taxes, training, and textbooks.

[8] 'Põhikooli- ja gümnaasiumiseadus (1993)' [Basic Schools and Upper Secondary Schools Act (1993)], *Riigi Teataja* [State Gazette], vol. I-63, no. 892, 1993. Available: https://www.riigiteataja.ee/akt/28542 (accessed 9 June 2017).

to choose the school for their child.[9] Schools had general catchment areas within municipalities, but when students switched to schools in a municipality they did not live in, a certain amount of funding went to that other municipality.

According to 2004–2005 Ministry of Education and Research study, 14% (3628) of primary level pupils did not attended school in their municipality although 98.4% had schools available in their municipalities. For grades 4 to 6, the percentage of "migratory pupils" was 21% (5375), and for grades 7 to 9 the number rose to 30% (7656). Of these pupils, 95.4% and 88.1% respectively had schools available in their municipalities. Frequent voluntary "migration" in compulsory education (grades 1–9) raised questions about the underlying causes. The study showed that parents tended to prefer schools that offered all three stages of study (grades 1–12, including gymnasiums). Schools with grades 1 to 12 are historic in Estonia.

However, there were some inconsistencies in parent behavior. On the one hand, they wanted their children to learn in smaller classes, but on the other hand, they preferred to send their children to large gymnasiums[10] early on to ensure later access to good secondary education (yet, the lower grades in these gymnasiums were most definitely overcrowded).[11] Education was becoming a means of defining one's social position. Parent choices were influenced by the prestige and imagined quality of the school.

The choice of school was also determined by signals in the education market, even more so after the introduction of state examinations for secondary school graduates in 1997 to ensure the quality of general education. The results of these exams enabled the state to assess how well students had done in their studies. Furthermore, they could also be used by universities for determining student admission. However, this mechanism quickly became an important public measure for assessing the work of schools and teachers, thus boosting competition between schools. It became trendy to rank schools based on state examination results. Those with results averaging close to 100% were considered elite schools. The introduction of secondary school state exams strengthened

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[9] Põhikooli- ja gümnaasiumiseadus (1993)' [Basic Schools and Upper Secondary Schools Act (1993)], *Riigi Teataja* [State Gazette], vol. I-63, no. 892, 1993. Available: https://www.riigiteataja.ee/akt/28542 (accessed 9 June 2017); 'Põhikooli- ja gümnaasiumiseaduse muutmise seadus (1997)' [Act amending and supplementing the Basic Schools and Upper Secondary Schools Act (1997)], *Riigi Teataja* [State Gazette], vol. I-24, no. 365, 1997. Available: https://www.riigiteataja.ee/akt/31593 (accessed 9 June 2017).

[10] Especially in the "elite" schools – gymnasiums with specialized programs (foreign languages) inherited from the Soviet era with excellent graduation results and shining reputations. Such schools could be found mostly in bigger cities (Tallinn, Tartu) and having children study in such schools increased expenses significantly.

[11] *Üldhariduskoolide võrgu korraldamine, Lühikokkuvõte* [Organisation of general education school network. Brief summary], Tartu, Poliitikauuringute Keskus Praxis, 2005, pp. 6, 13. Available: http://www.praxis.ee/wp-content/uploads/2014/03/2005-Uldhariduskoolide-vorgu-korraldamine-luhikokkuvote.pdf (accessed 12 July 2017).

the position of elite schools in society, and the introduction of entrance exams for first-graders extended educational selectivity to the pre-school level.[12]

Although there were efforts by various parties to reach a state-level agreement on the fundamentals of education, no consensus was found, thus complicating the formation of an optimal and comprehensive school network that would promote national educational priorities and regional development.

Since the state did not interfere with schools' struggles for survival, each municipality and county managed its own school network and education. During transition, the guiding principle in development of the Estonian school network was self-regulation. Schools able to cope with the new circumstances proved to be most sustainable. In most cases, these were schools administered by stronger and wealthier municipalities. Economically weaker schools, mostly in peripheral regions, experienced great difficulty, and lack of support from parents and local activists often forced them to close. Another important process was the various attempts to preserve the existing situation, but this was hindered by the per-student funding model. Consequently, the overall trend in the development of the general education network was a decrease in the number of schools.

At the beginning of the academic year 1995/96, there were 742 schools in Estonia. By the end of 2004/2005, 598 schools remained. Of the 144 schools that had closed, 105 were primary schools.[13] By the end of 2004/2005, ten out of Estonia's fifteen counties had closed at least half of their primary schools. It is especially noteworthy that approximately 40% of the new schools founded after restoration of independence had closed by 2005.[14]

After 1998/1999, the number of schools began to drop significantly (15–20 each year) with the greatest drop in 2001/2002 when 30 schools closed. Upper secondary schools were least affected – only four closed from 1995 to 2004. The number of basic schools kept growing until 1996/97 (270 schools), but then dropped to 225 by 2004.[15]

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[12] K. Loogma, 'Haridusmuutused Eestis: haridussotsioloogiline lähenemine' [Education changes in Estonia: educational sociological approach], in R. Tammist, H. Rumm (eds.), *Eesti poliitika eile, täna, homme: reforme seitsmest valdkonnast* [Estonia's policy yesterday, today, tomorrow: reform of the seven areas], Tartu, Johannes Mihkelsoni Keskus, 2005, pp. 109, 110; L. Jõgi, T. Jääger, L. Roodla, 'Eesti haridussüsteem ja hariduspoliitika aastatel 1990–2000' [Estonian education system and education policy 1990–2000], in R. Pae (ed.), *Eesti ja Soome haridus ning muutused EL-i hariduspoliitikas 1990–2000* [Estonian and Finnish education and changes in EU education policy 1990–2000], Tallinn, Tallinna Ülikooli kirjastus, 2008, p. 124.

[13] 'Statistikaamet, Statistika andmebaas, Üldharidus' [Statistical Office, Database of Statistics, General education]. Available: https://www.stat.ee/andmebaas (accessed 11 July 2017).

[14] P. Kreitzberg, 'Hariduslike võimaluste võrdsus ja koolivõrk' [Equality of educational opportunities and the school network], manuscript, 2005, Tallinn University Estonian Pedagogical Archives and Museum, K42490-8.

[15] *Ülevaade üldharidusest 2001–2005* [Overview of general education 2001–2005], Tartu, Haridus- ja Teadusministeerium, 2005, pp. 25-26. Available: http://dspace.ut.ee/bitstream/handle/10062/40907/Uldharidus_2001_2005.pdf?sequence=1&isAllowed=y (accessed 11 July 2017).

The number of schools also decreased due to mergers. A merger was not equivalent to closure for it did not reduce education opportunities in the region. Schools were merged in two ways. First, the teaching/learning process was concentrated into existing school buildings after merger. This option was more common in cities. Or, two or more schools shared administration, but students continued to study in their former school buildings. This approach was more likely to be applied in rural areas where physical distance between the merged schools could exceed ten kilometers. It is noteworthy that school mergers began to be implemented only in 1999. From 1999 to 2003, 20 schools were merged, 65% of which were in rural areas: in 13 cases, pupils continued to attend classes in their former school building. As with closures, the highest number of mergers took place in 2001/02.[16]

A school was closed usually because of a lack of pupils in the catchment area. In addition, an allegedly lower quality of education in small schools was also cited. However, the decisive factor was most often lack of financial resources in the municipality.[17] Although 15 new schools opened from 1994–2003, this did not change the overall trend of a shrinking school network.[18]

Since each school creates learning opportunities for pupils of a particular age group, each closed school meant fewer opportunities for pupils in a particular school level in the region. The Ministry of Education identified social justice as one of its priorities in its 1998 education strategy,[19] but such measures were not ultimately implemented at the national level.

The fundamental question that emerged from discussions on closing of small schools concerned the burden that it placed on children and their parents. There were no legally specified limits on school travel time in Estonia. Finnish School Law (1999), for example, contains an important criterion that effectively determines the density of the school network: a full-time pupil (13 years or younger) must not spend more than 2.5 hours per day travelling to and from school (including wait times). For children over 13 and children with special needs, the maximum is 3 hours.[20] In Estonia, the Basic Schools and Upper

16   *Ülevaade üldharidusest 2001–2005* [Overview of general education 2001–2005], Tartu, Haridus- ja Teadusministeerium, 2005, pp. 25-26. Available: http://dspace.ut.ee/bitstream/handle/10062/40907/Uldharidus_2001_2005.pdf?sequence=1&isAllowed=y (accessed 11 July 2017).

17   B. Aaviksoo, 'Väikekoolide sulgemine haridusõiguse piirajana, Piirangu kooskõla Põhiseadusega, Analüüs' [Closure of small schools as limiting educational rights. Convergence of the limiting with the Constitution. Analysis], manuscript, 2001, Archives of the Office of the Legal Chancellor of the Republic of Estonia, p. 16.

18   *Ülevaade üldharidusest 2001–2005* [Overview of general education 2001–2005], Tartu, Haridus- ja Teadusministeerium, 2005, pp. 25-26. Available: http://dspace.ut.ee/bitstream/handle/10062/40907/Uldharidus_2001_2005.pdf?sequence=1&isAllowed=y (accessed 11 July 2017).

19   *Eesti haridusstrateegia (eelnõu)* [Estonian educational strategy (draft)], Tallinn, Haridus-ministeerium, 1998, Article 151.1, p. 32.

20   *Valtioneuvoston oikeuskanslerin kertomus* [Report of the Chancellor of Justice], Helsinki, 2001, p. 157. Available: https://www.okv.fi/media/uploads/kertomukset/arkisto_1997-2011/okv2000.pdf (accessed 13 July 2017).

Secondary Schools Act Amendment Act of 1999 denotes the minimum number of students required for opening a new school – 30 appropriately-aged children living permanently in the catchment area for a primary school, 60 for a six-year elementary school, and 90 children for a basic school (grades 1–9). For secondary school (grades 10–12), the minimum number of students was 60. If a municipality decided to open a school with a smaller number of students than specified, it would have had to cover part of the staff salaries from its own budget.[21] But, municipalities already saw 90 students as the critical threshold for basic schools: fewer would have resulted in significant administrative and other difficulties.

Small rural school issues were also mentioned in the 2001 OECD Review, which presented a joint set of proposals for the future development of the Baltic states. One recommendation was to reduce discrepancy in the quality and availability of education between the urban and rural areas. OECD experts pointed out that school closures were too often motivated solely by considerations of economic efficiency, failing to recognize the wider implications.[22] In his October 2001 analysis, the Estonian Chancellor of Justice of Estonia pointed out that the Estonian school network was being run without any central planning or improvements. His analysis suggested that this could amount to a violation of the Constitution: "Everyone has the right to education. ... In order to make education accessible, the national government and local authorities maintain a requisite number of educational institutions."[23]

The Chancellor's analysis also emphasized that although state supervision had focused on curricula, the Ministry of Education had to also ensure that key educational policies and decisions were consistent with the Constitution and laws. This concurred with the Finnish Chancellor of Justice who stated that economic arguments that do not directly result from the Constitution are not sufficient to justify any restrictions on the education law. Any decision to close a school should be accompanied by specific calculations demonstrating that even with all possible measures (improved administrative efficiency, compound classes) in place, the municipality would not be able provide its other social services without closing the school.[24]

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[21] 'Põhikooli- ja gümnaasiumiseaduse muutmise ja täiendamise seadus (1999)' [Act amending and supplementing the Basic Schools and Upper Secondary Schools Act (1999)], *Riigi Teataja* [State Gazette], vol. I-24, no. 358, 1999. Available: https://www.riigiteataja.ee/akt/77246 (accessed 9 June 2017).

[22] *Riiklike hariduspoliitikate ülevaated, Eesti* [Reviews of national policies for education, Estonia], OECD, 2001, pp. 17, 24. Available: http://digar.nlib.ee/show/nlib-digar:9588 (accessed 13 July 2017).

[23] B. Aaviksoo, 'Väikekoolide sulgemine haridusõiguse piirajana, Piirangu kooskõla Põhiseadusega, Analüüs' [Closure of small schools as limiting educational rights. Convergence of the limiting with the Constitution. Analysis], manuscript, 2001, Archives of the Office of the Legal Chancellor of the Republic of Estonia], p. 20.

[24] B. Aaviksoo, 'Väikekoolide sulgemine haridusõiguse piirajana, Piirangu kooskõla Põhiseadusega, Analüüs' [Closure of small schools as limiting educational rights. Convergence of the limiting

In 2003, counties began to create county-level school network development plans by analysing regional needs and opportunities to create the best possible learning environment for youth. However, they did not follow uniform methodological guidelines, so approaches and thoroughness of projections varied considerably from county to county. Additionally, school sustainability differed in the plans: some preferred to highlight the process (strategic courses of action), but others set specific target values to be pursued in education administration. Resulting development plans were not easily compared because there was little systematisation or consensus on school sustainability indicators on the national level.[25]

The situation was critical, and the need for change in the funding model of general education was felt by all institutions, so the system was modified in 2000. Municipalities were divided into groups based on numbers of pupils (coefficients from 0.89 for cities with more than 5000 pupils to 1.5 for rural municipalities with fewer than 120). The implementation of coefficients allowed smaller municipalities to receive slightly higher allocations for education-related expenses. In 2005–2006, a radical reform for general education funding was in preparation but failed to garner sufficient political support.[26] Since 2008, Estonia has used a funding model that is still based on the number of pupils, but it also takes into account the actual upkeep costs of schools. The new model promotes survival of smaller primary schools, which is important for ensuring proper access to education.

The effects of the administrative and curricular changes were reflected in the results of the 2004 complex study of Estonian schools. When asked to evaluate their child's school on a 6-point scale (6 – excellent), 76% of parents (71% in rural schools) rated it between 4 and 6; 28% of rural parents would change schools if possible.[27] The study included 12% of Estonia schools. It appears that parents were quite satisfied with schools but lacked the opportunity to switch to another if they wished.

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with the Constitution. Analysis], manuscript, 2001, Archives of the Office of the Legal Chancellor of the Republic of Estonia], pp. 16-22.

[25] *Üldhariduskoolide võrgu korraldamine, Lühikokkuvõte* [Organisation of general education school network. Brief summary], Tartu, Poliitikauuringute Keskus Praxis, 2005, pp. 6, 7. Available: http://www.praxis.ee/wp-content/uploads/2014/03/2005-Uldhariduskoolide-vorgu-korraldamine-luhikokkuvote.pdf (accessed 12 July 2017).

[26] J. Reiljan, E. Reiljan, 'Eesti üldhariduse rahastamise olukord ja probleemid' [Situation and problems of financing general education in Estonia], 2005, pp. 126, 136. Available: http://www.academia.edu/18212423/Eesti_%C3%BCldhariduse_rahastamise_olukord_ja_probleemid (accessed 15 July 2017).

[27] L. Pallas, *Kooli õpikeskkond ja õpilaste toimetulek. Ankeet lapsevanemale. Tabelid* [School as learning environment and students' coping abilities. Parent survey. Tables.], Tallinn, Tallinna Ülikool, 2008; E.-S. Sarv, Õpetaja ja kool õpilase arengu toetajana. Õpetaja enesest ja koolist [Teacher and school as supporters of student development. Teacher on her/himself and on school], Tallinn, Tallinna Ülikooli Kirjastus, 2008. pp. 92-93.

Economic development and the school network

Following transition to self-management in January 1990, Estonia began dismantling Soviet-era economic structures (All-Union subsidiaries were liquidated or divided into smaller business units and large-scale farming was reorganised) and turned towards a Western-oriented economic system. The first years of restructuring were particularly complex, and in the early 1990s, the economy slumped. Economic transformations also affected education. During the Soviet era, insufficient state funding was offset by allocations from companies and collective farms. In a market economy, businesses were often under much pressure and schools did not receive any additional support from them. Many municipalities were not able, at least initially, to fill the resulting financial gap.

While transitioning from one socio-economic system to another, Estonia faced a difficult dilemma. On the one hand, it had to spend relatively more on education than highly-developed countries in order to catch up with them. On the other hand, many other crucial fields besides education were in similar need of development. Resulting expenditure on general education was unstable, ranging from 3.5 to 4% of the gross domestic product (GDP). This volatility notwithstanding, the expenditure on general education grew somewhat faster than the GDP from 1996–2004. Estonia's expenditure on education relative to its GDP slightly exceeded the European Union average, but its nominal level of funding was one of the lowest in the European Union. Only in 1999 could Estonia allocate more money to teaching activities and investment than to upkeep of school buildings. However, expenditure on general education declined again from 1999–2001. The level of funding stabilized in 2002 and 2003, and in 2004, a significant increase in the expenditure on education relative to GDP was achieved (reaching the level of 1999).[28]

It would not be fair to say that Estonia under-appreciated the social value of spending on education. In 2001, 5.5% of GDP was allocated to education, which was slightly more than the average in the European Union (5.1% of GDP). Low population density and the relative abundance of small schools and small classes caused Estonia to deal with relatively higher costs than other, more densely populated countries. In other words, an average was simply not good enough to catch the frontrunners. The level of funds allocated to education did not depend merely on the perceived social value of education, which was historically high in Estonia; it depended more on the level of economic development that determined the actual financial capacity of the country.

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[28] J. Reiljan, E. Reiljan, 'Eesti üldhariduse rahastamise olukord ja probleemid' [Situation and problems of financing of general education in Estonia], 2005, pp. 127, 129-130, 132, 134. Available: http://www.academia.edu/18212423/Eesti_%C3%BCldhariduse_rahastamise_olukord_ja_probleemid (accessed 15 July 2017).

Issues of general education funding were debated not only in Estonia but also all over the world[29] as equal access to education is one of the main contributors to social mobility and a key factor in the growth of human capital that determines how countries develop. Various accounts of education funding often highlighted two aspects – equality and efficiency. The former emphasized the importance of securing equal opportunities, while the latter stressed the efficient use of resources.[30]

In order to offset the shortcomings of the national system, private individuals and associations (in cooperation with local governments and with considerable help from foreign aid) established new educational institutions – private schools, including schools for children with special educational needs. The first private schools in Estonia were founded in 1990. Their numbers grew from 21 in 1993/94 to 32 by the end of 2004/2005.[31] The earliest private schools were largely driven by a desire to introduce new ideas (e.g., Waldorf pedagogy) into education and society. The emergence of private schools can be regarded as a sign of social yearning for a substantive change in education.

Conclusion

The network of Estonian general education schools was decentralized in 1990 after which the state handed its decision-making powers and responsibilities for schools over to municipal governments. Decentralisation and liberalisation resulted in a sharp increase in the number of general education schools during the first decade of independence. However, the same decade also saw a rapidly declining birth rate, which led to a marked decrease in the number of pupils, which has pressured municipalities to close schools or school districts since the end of the 1990s. In addition to demographic trends (including urbanisation), restructuring of the school network was also determined by educational policy decisions and underfunding of general education. Comprehensive solutions to problems in the school network were impeded by municipalities that closed schools. The Constitution forbade the state from interfering with these decisions.

The number of schools continued to decrease in the 2000s. The percentage of basic schools (grades 1–9) remained effectively the same over the years,

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[29] D. Aaronson, 'The Effect of School Finance Reform on Population Heterogeneity,' *National Tax Journal*, no. 52, 1999, pp. 5-29; R. Berne, M. Moser, L. Stiefel, 'Social Policy: School Finance,' *Journal of Management History*, vol. 5, no. 3, 1999, pp. 165-179; T. Nechyba, 'Public School Finance and Urban School Policy: General versus Partial Equilibrium Analysis,' in *Brookings-Wharton Papers on Urban Affairs*, Washington, Brookings Institution Press, 2003, pp. 176-180.

[30] R. Berne, M. Moser, L. Stiefel, 'Social Policy: School Finance,' *Journal of Management History*, vol. 5, no. 3, 1999, pp. 165-179.

[31] *Erakoolid Eestis* [Private schools in Estonia], Tallinn, Kultuuri- ja Haridusministeerium, 1994, p. 11; 'Statistikaamet, Statistika andmebaas, Õpe üldhariduskoolides: erakoolid' [Statistics Estonia. Database of statistics. Training in general education schools: private schools]. Available: https://www.stat.ee/andmebaas (accessed 12 September 2017).

while the percentage of upper secondary schools (grades 1–12; 224 in 1990, 236 in 2004) increased at the expense of primary schools (grades 1–6).

Given the importance of schools in bringing about balanced regional development, Estonia should continue to acknowledge that its low population density and small schools and small classes will result in a somewhat costlier education system. Other challenges include adapting to demographic trends and synchronization of the quality of educational services across the regions.

Changes in Vocational Pedagogy after Restoration of Estonian Independence

Reeli Liivik and Meidi Sirk

Abstract. After the end of the Soviet regime and the restoration of Estonian independence in 1991, significant changes in vocational education took place, which were influenced by social and economic transformations. Soviet centralised and production-related vocational education became school-based because large factories closed and the economy changed. Changes in the labour market demanded different skills and specialties and different pedagogical approaches to prepare people for work. Vocational schools and teachers faced many challenges. In this article, we discuss the significant national changes that took place in vocational education after the collapse of the Soviet regime and before Estonia joined the European Union as well as the changes long-serving vocational teachers experienced in vocational pedagogy. Our research is qualitative, using a phenomenological approach based on semi-structured interviews with nine long-serving vocational teachers. The main results show that there have been many changes on the national level in vocational education but not all influenced teachers' daily teaching. Also, many changes occurred that disturbed practice such as shortened study periods or reorganisation of the school network. Vocational teachers also had positive experiences related to curricula development and standardisation, which created a common basis and understanding of learning content.

Keywords: vocational pedagogy, vocational education, vocational schools, changes in vocational education and training

Introduction

In this article, we focus on changes in Estonian vocational pedagogy after the restoration of independence in 1991 until joining the European Union in 2004. We define vocational pedagogy as a pedagogical discipline that deals with wider issues of vocational education and training (VET), including organisation, principles, and financing of VET; cooperation and relationships between the worlds of work, vocations, and education;[1] and development of youth and adult competences for various types of careers.[2] It also refers to results from the many decisions that vocational teachers made during teaching by adjusting

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[1] CEDEFOP, *Research Paper No. 47 'Vocational Pedagogies and Benefits for Learners: Practices and Challenges in Europe*,' Luxembourg, Publications Office of the European Union, 2015.

[2] R. Arnold, A. Krämer-Stürzl, *Berufs-und Arbeitspädagogik: Leitfaden der Ausbildungspraxis in Produktions-und Dienstleistungsberufen* [Vocational and work pedagogy: Guidelines for training practices in production and service occupations]*, Berlin, Cornelsen Girardet, 1999, p. 17.

their approaches to meet the needs of students.[3] Vocational teachers played an important role in the implementation of VET reforms:[4] they not only carried out the changes in VET but were also affected by them through improvement of knowledge and skills needed to meet the expectations that accompanied the changes.[5] Various studies (in Estonian) have emphasised the changes that influenced VET teachers' work such as cooperation between businesses, other schools and international partners, and changes in teaching practices and students.[6]

After the restoration of independence in Estonia in 1991, significant changes in vocational education were influenced by social and economic transformations. Transition from the Soviet regime to a democratic society demanded remarkable developments. Changes in the labour market demanded different skills and specialties and different pedagogical approaches to prepare people for work. The entire VET institutional infrastructure had to be rebuilt in a very short time. Soviet centralised and production-related vocational education became school-based because changes in the economy shut down large factories;[7] cooperation with new, small, and unstable enterprises began. The main changes affected laws and regulations on the organisation of vocational education, financing principles, re-organisation of the school network, forms and levels of study, and organisation of practice.[8]

Our study discusses the significant national changes that took place in vocational education after the collapse of Soviet regime until joining the European Union and the changes long-serving vocational teachers experienced in vocational pedagogy.

[3] CEDEFOP, *Research Paper No. 47* '*Vocational Pedagogies and Benefits for Learners: Practices and Challenges in Europe,*' Luxembourg, Publications Office of the European Union, 2015.

[4] CEDEFOP, *Trends in VET Policy in Europe 2010–12: Progress Towards the Bruges Communiqué*, Luxembourg, Publications Office of the European Union, 2012.

[5] M. Singh, 'Investing the Changes in Teacher Professional Learning: A Case Study of QMEA Schools,' *Cross Cultural Communication*, vol. 7, no. 2, 2011, pp. 63-72.

[6] K. Loogma, 'The Situation of VET Teachers in Estonia,' in S. Kirpal (ed.), *Changing Roles and Competences of VET Teachers and Trainers. Final Report. National Summaries of Interview Results*, vol. 2, University of Bremen, 2010, pp. 97-116; M. Ümarik, S. Rekkor, 'Diversification of Students and Professional Roles of Vocational Teachers: Teachers' Individual Approaches to Negotiate Work Identities,' in J. Mikk, M. Veisson, P. Luik (eds.), *Change in Teaching and Learning*, vol. 5, Frankfurt am Main, Peter Lang, 2013, pp. 9-26; M. Sirk, R. Liivik, K. Loogma, 'Changes in the Professionality of Vocational Teachers as Viewed Through the Experiences of Long-serving Vocational Teachers in Estonia,' *Empirical Research in Vocational Education and Training*, vol. 8, no. 13, 2016, pp. 1-26.

[7] K. Loogma, 'The Situation of VET Teachers in Estonia,' in S. Kirpal (ed.), *Changing Roles and Competences of VET Teachers and Trainers. Final Report. National Summaries of Interview Results*, vol. 2, University of Bremen, 2010, pp. 97-116.

[8] *1996–2006: Kutseharidus* [1996–2006: Vocational education], Tallinn, Statistikaamet, 2007, p. 48.

We used qualitative research strategies based on analysis of documents and on personal experiences using the phenomenological approach.[9] Data were collected in 2014 in semi-structured interviews that lasted 1–2 hours. Questions focussed on discussion of becoming a vocational teacher, duties of a vocational teacher, major changes in VET over the last two decades experienced by teachers, and the effects of political changes and reforms on teachers' work. The sample involved nine vocational teachers between the ages of 52 and 72 who had 23 to 39 years of pedagogical experience. The interviewees taught various subjects (clothing manufacturing, food processing, agriculture, etc.). The thematic analysis process was used to analyse the data.[10] All interviews were saved and transcribed. In the course of reading the interviews texts, notes and samples were taken, highlighting issues significant for teachers and relevant to vocational pedagogy during this period.

Changes in vocational pedagogy from 1991 to 2004

At the beginning of the transition period, the VET system was identified as the most difficult area within Estonian educational policy because it faced many challenges – adaptation to a market economy, implementation of modern curricular and education structures, and decline in participation and social status.[11] After 1992, production in Estonia fell by 30% per year, agriculture collapsed,[12] and the Soviet-style vocational education system, which was tied to a planned economy and production, was replaced with a school-based one. In the Soviet system, vocational training in the schools was based on the needs of state-run companies (factories, collective farms, etc.). Additionally, these places provided training in their own workshops, and upon graduating from a VET school, the graduates' workplaces were already determined. School-based vocational training meant that up to half of the studies took place in the school environment, providing theoretical knowledge, and was supplement primarily by practice in school workshops and later at a workplace. But, the school-based system met with new problems – newly-established companies had no interest, time, or reasons for involvement with vocational education, and there was no legislation tying businesses to the VET system.[13]

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[9] J. Smith, M. Larkin, *Interpretative Phenomenological Analysis: Theory, Method and Research*, London, SAGE Publication, 2009; C. Moustakas, *Phenomenological Research Methods*, California, SAGE Publications Inc, 1994.

[10] V. Braun, V. Clarke, 'Using Thematic Analysis in Psychology,' *Qualitative Research in Psychology*, vol. 3, no. 2, 2006, pp. 77-101.

[11] *Estonia: Overview of the Vocational Education and Training System in 2005*, ReferNet Estonia, 2005. Available: https://www.cedefop.europa.eu/files/2005_to_ee.pdf (accessed 11.04.2020)

[12] M. Laar, 'Eesti uus algus' [New beginning of Estonia], in K. Tael (ed.), *Eesti reformikogemus teel Euroopa Liitu* [Estonia's reform experience on the road to the European Union], Välisministeerium, 2009, p. 9.

[13] R. Neudorf, T. Annus, L. Orro, K. Jõgi, 'National Observatory of Estonia, European Training Foundation,' in *The VET System in Estonia: Recent Changes, Challenges and Reform Needs*, Sofia, Sibi Publishing House, 1997, pp. 19-20.

The changes in Estonian vocational education took place in several stages,[14] which will be discussed chronologically through the experiences of long-serving teachers.

Liberal adjustment, 1991–1996. The first years of independence were very difficult for vocational education because of the uncertainty about the country's economic development and the passivity of the Ministry of Education in the field of vocational education.[15] In the early 1990s, liberal adjustment within vocational schools responded to changes in the labour market and the economy. The previous system of practical training was weakened and changed considerably by comprehensive restructuring during privatisation and reorientation from Eastern to Western markets.[16] Priority in education policy was given to general and higher education,[17] and developments in VET were quite random. The department responsible for VET in the Ministry of Education was abolished,[18] so an institution for the governance of VET from 1991–1995 did not even exist.[19] The entire VET system had to be rebuilt because the previous systems were destroyed, even the things that worked well. Long-serving teachers noted that the system of career counselling in particular was abolished, there were no medical or catering services for students, and social workers and school psychologists were lacking:

> ...in the beginning everything was demolished ... we started to build up … now we have a head of departments, an activity leader and a social pedagogue – at that time we were also social pedagogues ...

[14] K. Loogma, 'Europeanization in VET Policy as a Process of Reshaping the Educational Space,' *International Journal for Research in Vocational Education and Training,* vol. 3, no. 1, 2016, pp. 16-28.

[15] M. Kask, 'Viimaste aastate muudatused Eesti kutseharidussüsteemis ning kavandatavad reformid' [The latest year's changes in Estonian VET system and planned reforms], in *Baltimaade kutsehariduse ja – koolituse konverents Euroopa riikide vahelise koostöö tähtsus: 22. ja 23. aprillil 1996 Tallinnas* [The conference of VET of Baltic states. The importance of the cooperation between European countries: April 22-23, 1996, Tallinn], Torino, European Training Foundation, 1996, pp. 14-44.

[16] K. Loogma, 'Europeanization in VET Policy as a Process of Reshaping the Educational Space,' *International Journal for Research in Vocational Education and Training,* vol. 3, no. 1, 2016, pp. 16-28; K. Loogma, 'The Situation of VET Teachers in Estonia,' in S. Kirpal (ed.), *Changing Roles and Competences of VET Teachers and Trainers. Final Report National Summaries of Interview Results*, vol. 2, University of Bremen, 2010, pp. 97-116.

[17] 'Estonia: Overview of the Vocational Education and Training System in 2005,' *RefatNet Estonia*, 2005. Available: https://www.cedefop.europa.eu/files/2005_to_ee.pdf (accessed 11.04.2020)

[18] A. Kõverjalg, 'Kutsehariduse arenguprobleemid' [The development problems of vocational education], *Eesti Haridusminimsteeriumi pedagoogiline ajakiri: Haridus* [Pedagogical journal of the Estonian Ministry of Education: Education], no. 8, 1991, pp. 2-5; A. Kõverjalg, 'Kutsehariduse arenguprobleemid II' [The development problems of vocational education II], *Eesti Haridusminimsteeriumi pedagoogiline ajakiri: Haridus* [Pedagogical journal of the Estonian Ministry of Education: Education], no. 9, 1991, pp. 2-5.

[19] R. Neudorf, T. Annus, L. Orro, K. Jõgi, 'National Observatory of Estonia, European Training Foundation,' in *The VET System in Estonia: Recent Changes, Challenges and Reform Needs*, Sofia, Sibi Publishing House, 1997, pp. 19-20.

At the beginning of the 1990s, when the system of career counselling
was abolished, the minister thought that this was Soviet and should be
dissolved ... medical services were taken away from us... it was taken
away by the government...

The network of vocational schools was unevenly distributed, concentrating
in urban areas. In 1991/1992, 73% of vocational school students studied in
the bigger cities.[20] There were many types of VET schools (vocational, technical,
vocational secondary) but with no clear differences between the names
of schools and curriculum.[21] Almost every school specialised in one area
(e.g., Vocational Secondary School no 6, no 21, no 42 in Tallinn specialised
in metalwork). Five special schools were opened for prisoners and students
who needed special educational conditions. But, employers were not satisfied
with the narrow vocational training developed in the Soviet era.[22] Technical
vocational education needed to develop, but generally, attention focused on
humanities, which did not provide the necessary base for technical training.[23]
In the mid-1990s, student dropout rates from vocational schools was high
(14–15%) and was attributed to the students' low academic abilities, poor
educational success, or unpopular specialities.[24] However, almost all interviewed
teachers mentioned other reasons for students dropping out of school such as
decreased social supervision and family support. Many parents went abroad to
work and left their children without support and guidance. Students did not
learn primary work skills at home and their attitude towards work changed:

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[20] M. Kask, 'Viimaste aastate muudatused Eesti kutseharidussüsteemis ning kavandatavad
reformid' [The latest year's changes in Estonian VET system and planned reforms], in *Baltimaade
kutsehariduse ja – koolituse konverents Euroopa riikide vahelise koostöö tähtsus: 22. ja 23. aprillil
1996 Tallinnas,* [Baltic states VET conference. The importance of the cooperation between
European countries: April 22-23, 1996, Tallinn], Torino, European Training Foundation, 1996.

[21] A. Kõverjalg, 'Kutsehariduse arenguprobleemid' [Development problems of vocational
education], *Eesti Haridusminimsteeriumi pedagoogiline ajakiri: Haridus* [Pedagogical journal
of the Estonian Ministry of Education: Education], no. 8, 1991, pp. 2-5; A. Kõverjalg,
'Kutsehariduse arenguprobleemid II' [Development problems of vocational education II], in
Eesti Haridusminimsteeriumi pedagoogiline ajakiri: Haridus [Pedagogical journal of the Estonian
Ministry of Education: Education], no. 9, 1991, pp. 2-5.

[22] Ü.-T. Ojassoo, *Riikliku kutseharidussüsteemi kutsekoolid Eestis aastatel 1944–1991* [Vocational
schools in the vocational education system in Estonia 1944–1991], Tallinn, Haridus- ja
Teadusministeerium, 2005, pp. 16-31.

[23] A. Kõverjalg, 'Kutsehariduse arenguprobleemid' [Development problems of vocational
education], *Eesti Haridusminimsteeriumi pedagoogiline ajakiri: Haridus* [Pedagogical journal
of the Estonian Ministry of Education: Education], no. 8, 1991, pp. 2-5; A. Kõverjalg,
'Kutsehariduse arenguprobleemid II' [Development problems of vocational education II], *Eesti
Haridusminimsteeriumi pedagoogiline ajakiri: Haridus* [Pedagogical journal of the Estonian
Ministry of Education: Education], no. 9, 1991, pp. 2-5.

[24] M. Kask, 'Viimaste aastate muudatused Eesti kutseharidussüsteemis ning kavandatavad
reformid' [The latest year's changes in Estonian VET system and planned reforms], in *Baltimaade
kutsehariduse ja – koolituse konverents Euroopa riikide vahelise koostöö tähtsus: 22. ja 23. aprillil
1996 Tallinnas,* [Baltic states VET conference. The importance of the cooperation between
European countries: April 22-23, 1996, Tallinn], Torino, European Training Foundation, 1996.

...In my opinion, a very big gap came when the Republic of Estonia started and when mothers, fathers all ran across the bay and, I don't know, to work in other places. Then came many divorces and it is still ongoing ... and how the student population has substantial changed … it is different, how they think, their attitudes ... There are a lot of changes, and I can say, it is because of this old ESSR breakdown and this Republic of Estonia that came in its place ... because of these divorces and broken families, there are no men in these families and boys will come here, many boys need teaching how to turn a screw...

In 1993, some reorganisation of structures and procedures for upgrading the curricula and learning content began. Foreign experts and foreign-funded projects played a significant role in building the Estonian VET system. The major partners were from Finland, Denmark, and Germany. Curricula development began in 1993 with co-operation between the Estonian National School Board and the Royal Danish School of Educational Studies for Vocational Teachers in the project 'Development of Estonian Vocational Education System'. The PHARE (one of the main pre-accession assistance financial instruments for countries of Central and Eastern Europe) 1994/1995 VET Reform Programme supported reform at the national and school level in areas of curriculum development, teacher training, upgrading of educational equipment, partnership with EU schools, and VET policy development. Thirteen pilot-schools were involved in development of a module-based curriculum. The project focused on wider preparation in the vocational field that would allow students to specialise in a short time, adjust to changes in the labour market, and participate in further training or retraining after graduation. From 1995–1999, cooperation continued with Irish, Danish, and Finish curriculum developers, and Estonian-Danish cooperation in development of a vocational pre-training curriculum model began.[25]

Vocational teachers were always involved in curriculum development, and many teachers viewed it as an additional administrative obligation that interfered with their everyday work:

...this work with curriculum development, it should be done more by administrative people, it means that a lot of things are pushed on the teacher's shoulders ... And those, who give us things to do should not forget that the teacher's main task, main job is to stand and shine in

[25] M. Kask, 'Viimaste aastate muudatused Eesti kutseharidussüsteemis ning kavandatavad reformid' [The latest year's changes in Estonian VET system and planned reforms], in *Baltimaade kutsehariduse ja – koolituse konverents Euroopa riikide vahelise koostöö tähtsus: 22. ja 23. aprillil 1996 Tallinnas,* [Baltic states VET conference. The importance of the cooperation between European countries: April 22-23, 1996, Tallinn], Torino, European Training Foundation, 1996; *Tegevuskava kutseharidussüsteemi arendamiseks Eestis aastatel 2001–2004* [Action Plan for development of VET system in Estonia in 2001–2004], Tallinn, Haridusministeerium, Kutsehariduse ja Tööhõive Seirekeskus, OÜ Sõnasepp, 2001; R. Neudorf, T. Annus, L. Orro, K. Jõgi, 'National Observatory of Estonia, European Training Foundation,' in *The VET System in Estonia: Recent Changes, Challenges and Reform Needs*, Sofia, Sibi Publishing House, 1997.

front of the class and teach youth and their main job is not some kind of administrative work…

Many vocational schools got partnership schools in foreign countries, and teachers had the opportunity to participate by visiting those schools and share experiences:

> …then the Republic of Estonia was established. We had partnership schools everywhere, also in Finland. Finns came to visit us and watched and said, "You are lucky that you had a 50-year Soviet regime here." I didn't understand at all what they wanted to say and what they thought. They thought that we still have the skills of craft. I visited a vocational school in Finland the first time, and I observed the lesson where they taught a boy to screw using a machine. They don't know what a screwdriver is any more and we are going the same way…

It is important to mention that despite curriculum and equipment developments, there was insufficient attention paid to teaching materials. In some vocational fields, teachers used old books from the Soviet era, but mainly they searched for new information and wrote their own teaching materials:

> …then there weren't any kinds of books, you had to write teaching materials yourself and this meant that the first lessons were like – you took your teaching materials and students sat nicely in the classroom. They took their [booklets] – silence – everyone wrote things down, because there was nothing to learn from … At the beginning, it was awful, and you had to do make all teaching materials…

In 1995, preparation of vocational education legislation began. The *Vocational Education Institution Act* was approved in 1995, but all implementing acts were not prepared. The law focused on the administrative side of school management and regulations for vocational school activities but not the content of curricula.[26] The *Vocational Teacher Statute* (1995) introduced the term 'vocational teacher' that eliminated differentiation between theoretical and practical training teaching positions and described pedagogical requirements and work content for vocational teachers.[27] Some interviewees viewed this change positively because of better integration between theory and practice:

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[26] M. Kask, 'Viimaste aastate muudatused Eesti kutseharidussüsteemis ning kavandatavad reformid' [The latest year's changes in Estonian VET system and planned reforms], in *Baltimaade kutsehariduse ja – koolituse konverents, Euroopa riikide vahelise koostöö tähtsus: 22. ja 23. aprillil 1996 Tallinnas,* [Baltic states VET conference. The importance of the cooperation between European countries: April 22-23, 1996, Tallinn], Torino, European Training Foundation, 1996, p. 15; R. Neudorf, T. Annus, L. Orro, K. Jõgi, 'National Observatory of Estonia, European Training Foundation,' in *The VET System in Estonia: Recent Changes, Challenges and Reform Needs*, Sofia, Sibi Publishing House, 1997, p. 26.

[27] 'Kutseõpetaja statuut' [Vocational Teacher Statute], *Riigi Teataja Lisa* [Supplement to the State Gazette], no. 49, 1995. Available: https://www.riigiteataja.ee/akt/30820 (accessed 11.04.2020)

...then the same teacher started teaching it all [theory and practice]. And of course, it was easier for work practice; since I had taught the theory, I knew exactly what I was going to demand in practice, and I had a clear picture of what each of them knew and was able to do and how…

In 1996, the Department of Vocational Education was restored in the Ministry of Education and vocation schools were internally differentiated, allowing studies at different levels based on previous education and time: 1–3 years after basic education (ISCED3/3C), at least 4 years after basic education with upper-secondary general education (ISCED3/3A), post-secondary technical education (ISCED5/3A), 1–3 years after upper-secondary education (ISCED3/4B), and post-secondary technical education (ISCED5/5B). Vocational studies contained theory and practical training, supportive theoretical training, and compulsory general subjects; 53% of vocational schools offered studies in Estonian only, 19% in Russian only, and the remaining 27% used both languages. A total of 67% of students studied in Estonian.[28]

The popularity of vocational subjects changed from 1992/1993 to 1995/96, and the percentage of students in vocational schools increased from 6.9% to 10.4% in trade and business and from 9.9% to 13.3% in service, catering and tourism. In contrast, the numbers decreased in industry and crafts (59.2% to 50.5%) and in agriculture, forestry and fisheries (9.9% to 6%).[29] A forestry teacher described how these trends influenced her work:

...[during the Soviet period] those, who wanted to come, were much more than we were able to take ... I don't know how there were enough students then ... maybe they really aren't interested ... The remaining groups were small...

Legislative framework for VET, 1997–2000. In 1997, the National Observatory of Vocational Education and Employment was established to observe developments in VET, which intensified on the national level. Constructive dialogue between trainers and social partners began and legislation was passed. In 1998, the *Vocational Institution Act* and *Conceptual Basis for Vocational Education* were adopted. Also, the *General Requirements for the National*

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[28] *Reviews of National Policies for Education: Estonia*, OECD, 2001, p. 134; M. Kask, 'Viimaste aastate muudatused Eesti kutseharidussüsteemis ning kavandatavad reformid' [The latest year's changes in Estonian VET system and planned reforms], in *Baltimaade kutsehariduse ja – koolituse konverents Euroopa riikide vahelise koostöö tähtsus: 22. ja 23. aprillil 1996 Tallinnas,* [Baltic states VET conference. The importance of the cooperation between European countries: April 22-23, 1996, Tallinn], Torino, European Training Foundation, 1996.

[29] M. Kask, 'Viimaste aastate muudatused Eesti kutseharidussüsteemis ning kavandatavad reformid' [The latest year's changes in Estonian VET system and planned reforms], in *Baltimaade kutsehariduse ja – koolituse konverents Euroopa riikide vahelise koostöö tähtsus: 22. ja 23. aprillil 1996 Tallinnas,* [Baltic states VET conference. The importance of the cooperation between European countries: April 22-23, 1996, Tallinn], Torino, European Training Foundation, 1996, pp. 16-35.

Curricula of Vocations, Occupations and Specialities was approved,[30] which stated that the curriculum should contain vocational practical and theoretical training, subjects for social skills, electives, and in some cases, general secondary education.[31] School curricula had to conform to the national curriculum, but national curricula was lacking a long time.[32] The aims of VET were to create opportunities for self-development, offer wider professional skills, and to be effective, flexible, of high-quality, collaborative, and available.

In addition to curricula development, attention was paid to VET staff development through efficient use of resources, training in larger regional VET centres, and diversifying the form of ownership of vocational institutions (municipal and private).[33] The number of state VET institutions decreased because of consolidation of small VET schools.[34]

To increase VET flexibility, learning opportunities were created for adults and young people without basic education and for people with disabilities, who could acquire vocational education and which gave them skills to get a job. VET reforms in 1999/2000 introduced vocational secondary education based on basic education, vocational secondary education based on general secondary education, and professional higher education.[35] The time for studies in vocational secondary schools based on basic education decreased: they lasted at least 120 weeks and included at least 50% vocational training and studies in general education for 50 weeks. Studies based on upper-secondary education lasted 40-100 weeks and included 85% vocational training and six weeks of general education studies.[36] But teachers noted that shorter periods weren't enough for younger students' professional growth:

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[30] *Tegevuskava kutseharidussüsteemi arendamiseks Eestis aastatel 2001–2004* [Action Plan for development of VET system in Estonia in 2001–2004], Haridusministeerium, Kutsehariduse ja Tööhõive Seirekeskus, 2001.

[31] 'Kutse-, eri- ja ametialade riiklike õppekavade üldnõuete kinnitamine' [Ratification of the General Requirements for the National Curriculum of vocations, occupations and specialities], *Riigi Teataja I* [The State Gazette I], vol. 94, no. 1504, 1998. Available: https://www.riigiteataja.ee/akt/76297 (accessed 11.04.2020)

[32] M. Kask, 'Viimaste aastate muudatused Eesti kutseharidussüsteemis ning kavandatavad reformid' [The latest year's changes in Estonian VET system and planned reforms], in *Baltimaade kutsehariduse ja – koolituse konverents Euroopa riikide vahelise koostöö tähtsus: 22. ja 23. aprillil 1996 Tallinnas,* [Baltic states VET conference. The importance of the cooperation between European countries: April 22-23, 1996, Tallinn], Torino, European Training Foundation, 1996.

[33] H. Zelloth, *Monograafia Eesti kutsehariduse, täiendkoolituse ning tööhõiveteenuste süsteemide ja struktuuride kohta* [Monograph about the systems and structures of vocational education, further education and employment of Estonia], Tallinn, Sihtasutus Eesti Kutsehariduse Reform, INNOVE Elukestva Õppe Arendamise SA, 2003, pp. 17-20.

[34] *Tegevuskava kutseharidussüsteemi arendamiseks Eestis aastatel 2001–2004* [Action Plan for development of VET system in Estonia in 2001–2004], Haridusministeerium, Kutsehariduse ja Tööhõive Seirekeskus, 2001.

[35] *1996–2006: Kutseharidus* [1996–2006: Vocational education], Tallinn, Statistikaamet, 2007, p. 55.

[36] *Tegevuskava kutseharidussüsteemi arendamiseks Eestis aastatel 2001–2004* [Action Plan for development of VET system in Estonia in 2001–2004], Haridusministeerium, Kutsehariduse ja Tööhõive Seirekeskus, 2001.

...there is not enough time ... I liked the period when [studies] were four years after basic school … we had similar feelings [with colleagues], when three years were over, the fourth year I had the feeling that now we can start working. It gave them more experience, gave them speed...

There were also other problems in school-based vocational education because there were no regulations for practical training at schools and in businesses. In addition, the aims of practical training were too declarative.[37]

...you have now practical training, but what was needed was to go through and how ... there was no difference ... The students visited more sites and worked there, but the students were given [teacher names activities] such general work, not something that would later put bread on the table – basically busy work was given...

Development of teaching staff was necessary because many teachers had insufficient pedagogical education. They were unfamiliar with modern technology and teaching methods and their teaching practices were mainly academic, lacking integration of theory and practice.[38] Even experienced interviewees noted that changes in pedagogy were greater on paper (in curricula) and teaching had not changed much, but technology had:

In general, if you start to think, then the wording or how things were written down, new words, expressions [changed] in pedagogy. Actually, behind the expression, if you start to study it, the content is the same. ... But if you start to think then the equipment, technical tools, and these technologies, how things are done, there are actually more changes than in pedagogy.

In 1999, the Chamber of Commerce and Industry began creation of a professional qualification system and professional councils.[39] Development of professional standards and national curricula began. The *Professions Act* (2000) provided the basis for development of professional qualification requirements.[40] By 2000, all vocational schools were following modular curricula and 30% of these were consistent with professional standards.[41]

...at the end of the 90s, things were already... the common things were in vocational schools. [But also] there were differences ... when these

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[37] 'Õppepraktika korraldus kutseõppeasutustes' [Organisation of the traineeships in vocational education institution], *Riigikontrolli kontrolliaruanded* [Audit reports of the National Audit Office], no. 12-7/045, 2002.

[38] *Reviews of National Policies for Education: Estonia*, OECD, 2001, p. 142.

[39] K. Loogma, 'Europeanization in VET Policy as a Process of Reshaping the Educational Space,' *International Journal for Research in Vocational Education and Training,* vol. 3, no. 1, 2016, pp. 16-28.

[40] *Kutseseadus* [Proffessions Act], *Riigi Teataja I* [The State Gazette I], vol. 3, no. 7, 2001.

[41] *Tegevuskava kutseharidussüsteemi arendamiseks Eestis aastatel 2001–2004* [Action Plan for development of VET system in Estonia in 2001–2004], Haridusministeerium, Kutsehariduse ja Tööhõive Seirekeskus, 2001.

common standards and things came, naturally it created a common understanding of what to do and how...

Employers' associations played a significant role in construction of the vocational qualifications system, but small and medium-sized companies, the growth sector in Estonian employment, were not sufficiently represented.[42] Cooperation between businesses and schools had improved, but teachers remembered how each company jealously guarded their specialised technological practices and refused to share them with the schools who were educating and training the workforce: "…before it really used to be that you didn't get any technology or any information from the company..."

The most popular fields of study were commercial and business administration, engineering and trade, manufacturing and processing, architecture and construction, and personal services; from 1999/2000 on, computer sciences began to increase.[43]

Pre-joining period, 2001–2004. In 2001, the *Action Plan for the Estonian VET System 2001–2004* was adopted. The purpose was to prepare a competitive workforce for Estonian and international labour markets while providing both social and occupational readiness to work. Development of the curricula and the reorganisation of the network of vocational schools continued. Attention turned to guaranteeing learning opportunities, ensuring quality of training and development of the VET teacher training system. In 2002, *Requirements for Teacher Qualification* were introduced, which demanded from many vocational teachers higher education qualification levels.[44]

To ensure quality of training, more attention was paid to practical training in businesses. In 2001, vocational schools had to sign contracts for practical training between businesses and students, but there were no regulations for organising or financing this practice. Most students found businesses independently or through acquaintances or relatives; school initiative was minimal.[45] Teachers experienced problems of unmotivated enterprises caused by lack of financing because supervision was an unpaid, additional obligation: "When the student goes [to a workplace for practice], ... she needs a supervisor. But this supervisor wastes her time, loses working hours and earnings ..."

The purpose of the school network reform was to establish multifunctional VET regional centres that would specialize according to local employment

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[42] *Reviews of National Policies for Education: Estonia*, OECD, 2001.

[43] *1996–2006: Kutseharidus* [1996–2006: Vocational education], Tallinn, Statistikaamet, 2007, p. 79.

[44] *Tegevuskava kutseharidussüsteemi arendamiseks Eestis aastatel 2001–2004* [Action Plan for development of VET system in Estonia in 2001–2004], Haridusministeerium, Kutsehariduse ja Tööhõive Seirekeskus, 2001.

[45] 'Õppepraktika korraldus kutseõppeasutustes' [Organisation of the traineeships in vocational education institution], *Riigikontrolli kontrolliaruanded* [Audit reports of the National Audit Office], no. 12-7/045, 2002.

needs.[46] However, local governments were not interested in running vocational schools, and in 2003/2004, there was only one municipal vocational school, and the number of state vocational schools decreased because of reorganisation – consolidating small VET schools.[47]

Teacher experience with reorganisation of the school network indicated that they felt insecure because of the uncertain future of their school and job, or they emphasised that large VET centres had decreased communication and interaction with colleagues and emphasis on student-centred approach: "…decreasing costs, but in the bigger schools we have less opportunity to pay attention to students and their individuality …"

Better integration of general and vocational education was created in 2001 with the introduction of 'Pre-vocational training' (ISCED2) as a vocational elective in general schools. Admission to 'Vocational secondary education' was after either basic education (ISCED3B) or general upper-secondary education (ISCED3/4B). Vocational secondary education after basic education prepared students for trades for at least three years and gave them the possibility of entering the labour market or attending higher education if they passed state examinations. Vocational secondary education after general upper-secondary education prepared students for technically more demanding work for 1 to 2.5 years. In 2002/2003, 60% of vocational institutions provided learning programmes in Estonian and 20% in Russian.[48] In 2003, apprenticeship training was started by PHARE 2002.[49]

The most popular fields in 2004 were technical specialities, business and administration, and personal services.[50] But the popularity of VET was still low and after graduating basic school, only 26% of young people entered vocational schools in 2001.[51] In 2002/2003, only 9,4% of all students in Estonia attended vocational secondary education.[52] In 2004/2005, about 29% of basic school graduates and 13% of upper-secondary general school graduates continued their studies in vocational schools.[53] This was also experienced by teachers:

[46] K. Loogma, 'Europeanization in VET Policy as a Process of Reshaping the Eeducational Space,' *International Journal for Research in Vocational Education and Training,* vol. 3, no. 1, 2016, pp. 16-28.

[47] *Eesti kutseharidussüsteemi arengukava aastateks 2005–2008* [Development plan for the Estonian VET system 2005–2008], Haridus- ja Teadusministeerium, 2005, p. 43.

[48] H. Zelloth, *Monograafia Eesti kutsehariduse, täiendkoolituse ning tööhõiveteenuste süsteemide ja struktuuride kohta* [The monograph about the systems and structures of vocational education, further education and employment of Estonia], Tallinn, Sihtasutus Eesti Kutsehariduse Reform, INNOVE Elukestva Õppe Arendamise SA, 2003, pp. 20-38.

[49] *1996–2006: Kutseharidus* [1996–2006: Vocational education], Tallinn, Statistikaamet, 2007.

[50] *Eesti kutseharidussüsteemi arengukava aastateks 2005–2008* [Development plan for the Estonian VET system 2005–2008], Haridus- ja Teadusministeerium, 2005, p. 39.

[51] *1996–2006: Kutseharidus* [1996–2006: Vocational education], Tallinn, Statistikaamet, 2007, p. 55.

[52] H. Zelloth, *Monograafia Eesti kutsehariduse, täiendkoolituse ning tööhõiveteenuste süsteemide ja struktuuride kohta* [The monograph about the systems and structures of vocational education, further education and employment of Estonia], Tallinn, Sihtasutus Eesti Kutsehariduse Reform, INNOVE Elukestva Õppe Arendamise SA, 2003, p. 20.

[53] *1996–2006: Kutseharidus* [1996–2006: Vocational education], Tallinn, Statistikaamet, 2007, p. 13.

"…it's still low, the popularity of vocational education. … We all keep saying that we need a workforce, but when someone goes to a VET school, then it's like, like something second-rate…"

VET development was already affected by European strategies and Estonia joined the Copenhagen Declaration in 2002, which was the first great initiative of VET policy in Europe.[54]

Conclusion

In the early 1990s, VET started almost from scratch: all structures were liquidated as inappropriate baggage from the Soviet regime. Change focused at the national level for development of the VET system, its structures and effectiveness. It seemed that the best results could be achieved by reducing state support and resources. From 1993-2004, vocational education was under-financed, compared with general and higher education.[55] The number of state vocational schools decreased from 77 to 53 and municipal schools from 3 to 1, but private schools increased from 0 to 19. In 2004, there were 73 vocational schools with 28 183 students in Estonia. However, high-quality vocational education is expensive and requires money for equipment and involvement of businesses. Before 2003–2004, VET policy initiatives were still quite random; many goals were not achieved in 2001–2004,[56] and systematic activities only began with the 2005–2008 development plan for Estonian VETs.[57]

There have been many national changes in vocational education, but not all influenced everyday pedagogical work. Many changes emerged, which hampered teaching such as the shortened period of studies and reorganisation of the school network. In the midst of all the changes were vocational teachers who valued the student and the learning and teaching process above the systems, structures, and numbers. They implemented ideas of vocational pedagogy, valuing diligence, hard work, and vocation. Vocational teachers had positive experiences with curricula development and standardisation, which created a common basis and understanding of the learning content. Some teachers had positive experiences with changes in vocational pedagogy such as teaching more coherent theory and practice or clarity and comparability of curriculum as a result of reforms and professional standards. But many teachers viewed changes rather negatively. They experienced more formal than substantive

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[54] *Eesti kutseharidussüsteemi arengukava aastateks 2005–2008* [Development plan for the Estonian VET system 2005–2008], Haridus- ja Teadusministeerium, 2005, p. 11.

[55] *1996–2006: Kutseharidus* [1996–2006: Vocational education], Tallinn, Statistikaamet, 2007, p. 52.

[56] *Eesti kutseharidussüsteemi arengukava aastateks 2005–2008* [Development plan for the Estonian VET system 2005–2008], Haridus- ja Teadusministeerium, 2005, p. 37.

[57] *Eesti kutsehariduspoliitika arengud aastatel 2002–2008* [Developments of vocational education policy in Estonia in 2002–2008], Tallinn, Kutsehariduse Seirekeskus, 2008, p. 4; H. Zelloth, *Monograafia Eesti kutsehariduse, täiendkoolituse ning tööhõiveteenuste süsteemide ja struktuuride kohta* [The monograph about the systems and structures of vocational education, further education and employment of Estonia], Tallinn, Sihtasutus Eesti Kutsehariduse Reform, INNOVE Elukestva Õppe Arendamise SA, 2003, p. 36.

curriculum development, lack of career counselling for youth, and negative influences of reducing resources and time for the student-centred approach.

In conclusion, despite significant reorganisation, changes in VET regulations, and standardisation, long-time teachers focused on changes in the student population and teacher ability to support the development of students' professional knowledge, skills, and attitudes, which was the main purpose of vocational pedagogy at the time.

Restitution of Religious Education in Lithuania

Vaineta Juškienė

Abstract. The Soviet government separated the Church from the process of education, closed religious schools, eliminated religious content from curriculum, and prohibited group catechesis. The Lithuanian Awakening at the end of 1980s and early 1990s restored religious education, important to a large segment of the Catholic population. However, implementation of religious education lacked both legislative and practical foundations. The research questions raised in this context are: Which essential prerequisites enabled restitution of religious education in the 1990s? and What main results in the sphere of restoration of religious education were achieved from the beginning of independence until 2004? This study analyses academic literature and uses documents as research sources. Sources reveal that at the beginning of the Awakening, the Lithuanian government, the Academy of Sciences, and *Sąjūdis* encouraged citizens, organisations, and social groups to offer suggestions for amendments to the Soviet Lithuanian Constitution. Both the Catholic clergy and congregations responded to the invitation. Their active participation in the legitimation of religious education nurtured preconditions for restitution, even on the eve of restoration of independence. From a legal perspective, the status of religious education and incorporation of the Catholic Church into the education process of the country was finally solidified in 2000 upon ratification of the international agreement between the Holy See and the Republic of Lithuania on cooperation in education and culture. At the beginning of the 21st century, religious education in Lithuania had a legal basis and a firm status in the system of education and a network of Catholic schools was created (partly re-created).

Keywords: Catholic Church, religious education, Catholic schools

Introduction

During the Soviet era, religious education was erased from the education system in Lithuania: the Soviet government separated Church from state, closing functioning Catholic schools and excluding religion lessons from curriculum. In 1976, new regulations for religious communities expanded, introducing even greater bans: group catechesis was prohibited and a regulation allowing people to decide about their religious beliefs only after the age of 18 was adopted. No attention was paid to requests by the clergy to harmonise these regulations with Canon Law of the Catholic Church.[1] Consequently, religious education could be fostered secretly only within families. Research

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[1] *Lietuvos Katalikų Bažnyčios Kronika* [Chronicle of the Catholic Church], vol. 10, Chicago, L. K. Religinės Šalpos Rėmėjai, 1989.

indicates[2] that religious upbringing in families had little effect: parents were not familiar with the Catholic faith and the restrictions and negative attitudes towards the Church made Catholic education virtually impossible. Religious communities that performed catechesis activities underground were restricted and persecuted.

In this context, the idea of freedom of religion became an integral part of the concept of Lithuanian independence. One of the main conditions of freedom was good quality religious education, an important issue in the period of the Lithuanian Awakening. The idea of restitution of religious education was especially welcome among the Christian community and representatives of the Church. Integration of religious lessons in the process of education represented one of the clearest signs of freeing Lithuanian schools from Soviet ideology. At the same time, consequences of the former regime were particularly destructive for spiritual life, and implementation of religious ideas *de facto* lacked both legislative and practical foundations.

Issues surrounding regaining religious freedom and its diverse expressions have been researched by Lithuanian educologists,[3] but their work is usually only partly concerned with the restitution of religious education, the main focus of this article. A more comprehensive illustration of the development and implementation of the ideas of recreation of religious education is unfolded through analysis of state documents. Research questions are raised in this context: Which essential prerequisites enabled implementation of restitution of religious education from the end of the 1980s to 2004, and what were the main results in the sphere of restoration of religious education achieved from the restoration of independence to 2004? The subject of this article is limited to Catholic religious education. This limitation was chosen because of the religious composition of the inhabitants of Lithuania, which is dominated by the Roman Catholic faith.[4] I analysed academic literature and documents

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[2] A. Zulumskytė, J. Lipkienė, 'Katalikiškų mokyklų raida XX a. Lietuvos švietimo kontekste' [Development of Catholic schools in the context of education in Lithuania in the 20th century], *Lietuvių katalikų mokslo akademijos metraštis* [Annual of Lithuanian Catholic Academy of Science], vol. 22, 2003, pp. 445-458.

[3] O. Tijūnėlienė, V. Kaunaitė, 'Jaunesnio mokyklinio amžiaus vaikų katalikų religinio, dorinio ugdymo aspektai' [Aspects of Catholic religious and moral education of younger schoolchildren]*, Vakarų Lietuvos katalikiškoji kultūra IV* [Catholic culture of Western Lithuania IV], Klaipėda, KU leidykla, 2001, pp. 64-72; A. Zulumskytė, G. Overlingienė, 'Tikybos pamokų pasirinkimo motyvacija ir jos kaita 6–12 klasėse' [Reasons for choosing classes of Catholic religion and their changes in 6th to 12th grades], *Soter*, vol. 8, no. 36, 2002, pp. 227-235; A. Zulumskytė, 'Tėvų požiūris į tikybos mokymą mokykloje' [Parents' attitude towards teaching religion at school]*, Lietuvių katalikų mokslo akademijos suvažiavimo darbai: LKMA metraščio priedas* [Work of the Convention of Lithuanian Catholic Academy of Science: Supplement to LCAS Annual], Vilnius, Katalikų akademija, 2005, pp. 1563-1570.

[4] According to statistics, Lithuania was homogeneous both in pre- and post-Soviet periods. During the Soviet era, no analysis of the composition of residents according to their religious faith was possible. No questions about religious belief were asked in either censuses or in any sociological research. To discuss changes in religion in society from a historical aspect, it is necessary to use interwar data. The 1923 census indicates that 85.72 % of all residents were

that revealed the essential aspects and stages of Church and state educational policies in the process of restitution of religious education.

Beginnings of restoration of religious education

The idea for official restoration of religious education in Lithuania appeared at the advent of regaining Lithuanian independence together with other requirements of the Awakening. The Lithuanian government, Academy of Sciences, and *Sąjūdis* encouraged citizens, organisations, and social groups to submit suggestions for amendments to the Soviet Lithuanian (LSSR) Constitution. Both Catholic clergy and congregations responded to this invitation. In 1988, among other requirements presented to the Presidium of the Supreme Soviet of the LSSR and Mikhail Gorbachev, Secretary General of the Communist Party of the USSR, was the religion issue. The 23 May 1988 appeal to Gorbachev by priests of Panavėžys diocese requested the USSR "not restrict preparation of children for the Sacraments and allow religious education of children and youth."[5] In a priest symposium on 3 August 1988, Cardinal Vincentas Sladkevičius encouraged the clergy to initiate catechesis for children and religious education of youth before receiving approval from the Committee for Religious Matters or a special directive from the bishops.[6] At the same time, clergy from Vilkaviškis diocese sent a note to Gorbachev requesting equal opportunities for religious parents as well as non-religious parents to teach their beliefs to their children. On 11 September 1988, Lithuanian bishops presented the Presidium of the Supreme Soviet of the LSSR a request to allow congregations to establish religious schools or organize supplementary religious education.

According to sources, claims for religious education were becoming more intensive and concrete.[7] In their appeal to Gorbachev, Lithuanian believers asked for permission to allow priests and qualified laymen to systematically teach religion and morality/ethics to pupils in schools, boarding schools, and churches.[8] The first religion lessons for pupils in state schools started as early as the autumn of 1989. According to Cardinal Sladkevičius's letter to priests,

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Catholic. Changes in territorial and social circumstances make that data difficult to compare to the analysed period, but the 2001 census reveals a similar number of Catholics – 79%. See *Lietuvos gyventojai: struktūra ir demografinė raida* [Population of Lithuania: Composition and demographic development], Vilnius, Statistikos departamentas prie Lietuvos Respublikos Vyriausybės, 2006, pp. 70-75.

[5] *Lietuvos Katalikų Bažnyčios Kronika* [Chronicle of the Catholic Church], vol. 10, Chicago, L. K. Religinės Šalpos Rėmėjai, 1989, p. 183.

[6] Ibid., p. 160.

[7] A. Zulumskytė, J. Lipkienė, 'Katalikiškų mokyklų raida XX a. Lietuvos švietimo kontekste' [Development of Catholic Schools in the context of education in Lithuania in the 20th century], *Lietuvių katalikų mokslo akademijos metraštis* [Annual of Lithuanian Catholic Academy of Science], vol. 22, 2003, pp. 445-458.

[8] *Lietuvos Katalikų Bažnyčios Kronika* [Chronicle of the Catholic Church], vol. 10, Chicago, L. K. Religinės Šalpos Rėmėjai, 1989, p. 160.

this activity was a response to requests from believers and in reaction to new, favourable conditions.[9]

On 29 November 1989, LSSR Minister of Education Zabulis and Lithuanian Cardinal Sladkevičius signed a joint statement allowing parish priests to establish parish schools. Schools were ordered to provide, if requested by parents, a space for parish schools in state schools and to establish favourable conditions for teaching religion. The document stated that the Conference of Bishops was to appoint teachers of religion, deal with curriculum and personnel issues for religious education, and inform the Ministry of Education about their decisions.[10] This document laid the foundation for the legitimation of religious education in schools. Researchers of religious expression during this period[11] note that in comparison to other Soviet republics, the Lithuanian government placed the greatest pressure in terms of lessons on religion and were successful in introducing these lessons first.

Legitimation of religious education in comprehensive schools

In spring 1991, the Lithuanian Supreme Council began debating the draft Law on Education. Although religion lessons were already being taught in schools, this issue caused intense discussions. The new Law on Education, passed on 25 June1991, strengthened the legal status of religion lessons: it stated that state education institutions had to provide religious instruction upon parents' (including foster-parents) request, in accordance with the religion practiced in the immediate or extended family. Pupils who did not attend religion lessons would be taught other subjects concurrently – moral or civic education. Religion was taught by persons authorised by religious authorities.[12] These requirements were not significantly altered by any later amendments to the Law on Education.

Review of the reintroduction of teaching religion in neighbouring countries reveals that analogous provisions were included in the Law on Education in Latvia in 1998; in 1996, Estonian parents were granted the legal right to appeal to school authorities for religious education of their children, although schools were not obliged to grant their request.[13]

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[9] P. Subačius, *Dvidešimt penkeri religinės laisvės metai 1988–2013* [Twenty five years of religious freedom 1988–2013], Vilnius, LKMA Naujasis židinys-Aidai, 2015, p. 511.

[10] V. Aliulis, 'Tikybos mokymas ir katechetų rengimas pirmaisiais atkurtos Nepriklausomybės metais' [Teaching of religion and training of catechists in the first years after the restoration of independence], *XXI amžius* [21st century], no. 70, 1998, p. 4.

[11] P. Subačius, *Dvidešimt penkeri religinės laisvės metai 1988–2013* [Twenty five years of religious freedom 1988–2013], Vilnius, LKMA Naujasis židinys-Aidai, 2015, p. 513.

[12] 'Lietuvos Respublikos Švietimo įstatymas' [Republic of Lithuania Law on Education], *Valstybės žinios* [State News], 20.08.1991.

[13] P. Subačius, *Dvidešimt penkeri religinės laisvės metai 1988–2013* [Twenty five years of religious freedom 1988–2013], Vilnius, LKMA Naujasis židinys-Aidai, 2015, p. 520.

The legal right to religious education was officially established in the Lithuanian Constitution in 1992. The Constitution provided parents and foster parents with unrestricted right to foster their children's religious and moral upbringing in accordance with their faith.[14] In terms of formal education, teaching religion in state and municipal comprehensive schools was legitimised with respect to parental requests.[15] The Constitution states that there is no official/state religion in Lithuania but that the state recognises traditional churches and religious organizations. State-recognized churches and religious organizations are granted legal rights and may practice their beliefs freely, conduct services, and own houses of worship, charitable institutions, and schools for training their clergy.[16] Analogous religious freedoms and educational rights were embedded in the Law on Religious Communities and Associations in 1995.[17]

In terms of religious education, the Lithuanian Bishops' Conference and Catechetical centres and separate dioceses in charge of religious education strove to follow the provisions of the Magisterium of the Catholic Church, which encouraged upbringing of a comprehensively mature Christian who was active in the mission of the Church and improved the wellbeing of their country and the world according to the teachings of the Gospel.[18] The theoretical model of religious education was described in the three curriculum publications for comprehensive schools (1993, 1998, 2004).

Education objectives were applied to newly-issued Lithuanian religion teaching aids. The first original Lithuanian Catholic religion textbook was issued for primary schools in 1992; more intensive production of other religious education materials began in 1998.[19]

Reintegration of confessional schools into the education system

From a global perspective, the Lithuanian Constitution declared that state and municipal schools are secular, which means that the status of teaching a worldview or values was ambiguous. However, it also provided for

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[14] 'Lietuvos Respublikos Konstitucija' [Constitution of the Republic of Lithuania], *Valstybės žinios* [State News], 30. 11.1992, no. 33-1014, Article 26.

[15] Ibid., Article 40.

[16] Ibid., Article 43.

[17] *Lietuvos Respublikos Religinių bendruomenių ir bendrijų įstatymas* [Law on religious communities and associations of the Republic of Lithuania], 1995. Available: https://e-seimas.lrs.lt/portal/legalAct/lt/ TAD/TAIS.21783/SCDBicfusg (accessed 27.02.20).

[18] 'Gravissimum Educationis,' *Visuotinio Vatikano II Susirinkimo dokumentai* [Documents of the second Vatican Council], 1965, Available: http://www.lcn.lt/b_dokumentai/vatikano_2s/gravissimum-educationis.html (accessed 27.02.20).

[19] P. Subačius, *Dvidešimt penkeri religinės laisvės metai 1988–2013* [Twenty five years of religious freedom 1988–2013], Vilnius, LKMA Naujasis židinys-Aidai, 2015, p. 505.

the establishment of non-state institutions of education and teaching.[20] This formulation legitimated, indirectly, the ability to establish confessional schools, but legal establishment methods were limited and one possibility remained – establish non-state schools. Therefore, members of traditional religious communities did not have the same rights and conditions as other residents to educate their children in educational institutions in accordance with the beliefs of the family.

More flexible conditions were provided by the amendment to the Law on Education in 1998 that formalised the founding of state schools with a 'religious worldview.' The new formulation allowed the establishment of schools by several founders. Upon parent requests, state or municipal schools could be established through an agreement with a state recognised traditional religious community or upon initiative of the community, municipal council, or state institution.[21] The amendments to the Law on Education legitimated a new type of school, which solidified the role of the Church in the sphere of state education. The law stated that mandatory worldview education in these schools would be entrenched in the schools' regulations that were founded by at least two of the above-mentioned. The regulations established that:

- School heads are appointed and dismissed by the corresponding state or municipal institutions upon the proposal of the religious community;
- The religious community sets requirements for worldview education curriculum and teaching personnel; and
- Affirmation of school heads and teachers is organized by both founders (based on their competence).

In order to actualise the rights of religious freedom and strengthen religious education, the Association of Catholic School Teachers was established in 1992 and the Association of Catholic Parents was founded in 1999. After restoration of independence in 1990, the first Catholic secondary school in Lithuania was established in Telšiai. In 1995, this school was named for Bishop Vincentas Borisevičius and in 2002, it gained gymnasium status. The founders were the Telšiai Diocese curia and Telšiai Municipality. In 1991, the Panevėžys Diocese curia and Monsignor Juodelis established a Catholic school in Panevėžys. In 1993, the school was named for Bishop Kazimieras Paltarokas. Later this school was also transformed into a public institution with two founders: Panevėžys Municipality and the Panevėžys Diocese curia. Alytus Town Council created Alytus Catholic secondary school in 1996 that changed its name to Alytus Saint Benedict Secondary School in 1998. In 2000, Alytus Town Council and Vilkaviškis Diocese curia agreed to be the co-founders of Alytus Saint Benedict Secondary School, which became Alytus Saint Benedict Gymnasium in 2006.

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[20] 'Lietuvos Respublikos Konstitucija' [Constitution of the Republic of Lithuania], *Valstybės žinios* [State News], 30.11.1992, no. 33-1014, Article 40.
[21] 'Lietuvos Respublikos Švietimo Įstatymo pakeitimo Įstatymas' [Republic of Lithuania Law on the amendment of the Law on Education], *Valstybės žinios* [State News], 29.07.98, no. 67-1940, Article 10.4.

In 1999 in Utena, the Minister of Education and Science ordered that Utena Secondary School No. 1 merge with Catholic *Saulė* Secondary School and the newly formed institution received gymnasium status.[22] However, expansion of this type of school was not always easy. In Klaipėda, fierce discussions concerning the establishment of *Pranas Mašiotas* Catholic School in 1997 and the new premises that the school received in 1998 lasted for several months and were accompanied by opposition from mass media and the municipality.[23]

Similar to the inter-war period in Lithuania, monasteries had significant influence on the expansion of the school network. In 1989, the Little Brothers of St. Francis returned to Kretinga and nurtured the idea of recreating St. Francis Gymnasium. Upon their initiative, Kretinga Catholic Secondary School was opened in 1992. In 1998 it became a gymnasium and regained its old name, St. Francis Gymnasium. Later, it was transformed into a non-state school founded by St. Casimir Province of St. Francis Little Brothers of Lithuania. This act provided for restoration of historical continuity: after almost seventy years, the Little Brothers of St. Francis regained the right to call themselves the true and sole founders and hosts of Kretinga St. Francis Gymnasium. Analogous processes of restitution can be observed in other monasterial educational institutions.

The Jesuit School in Kaunas was re-established in 1991 and received gymnasium status in 1997. It was the first Catholic school in Lithuania to receive gymnasium status after the restoration of independence. Vilnius Jesuit Gymnasium began in 1995 and in 1999, it became a gymnasium with a sciences and humanities focus. The Order of the Jesuits founded Vilnius and Kaunas gymnasia, both not state-financed schools. In 1997 in Marijampolė, upon the initiative of Marian priests, the Marian School was recreated and received gymnasium status in 2007. This educational institution was also non-state financed.[24]

Since the beginning of the expansion of Catholic schools in 1991, they began to join the Association of Catholic Schools. During the Association's third conference, common Catholic school regulations were passed. In 1995, the constitutive conference of the Association of Lithuanian Catholic Schools was held in Pažaislis (Kaunas). The same year, the Ministry of Justice officially registered the Association of Pedagogues of Catholic Educational Institutions of Lithuania (LKMPA), which was recognised by the Lithuanian Bishops' Conference. In 1996, LKMPA became an official member of the European Committee for Catholic Education (CEEC). During the 2004

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[22] V. Juškienė, *Lietuvos katalikiškųjų gimnazijų veiklos 1918–1940 m. ir 1990–2008 m. pedagoginiai aspektai* [Pedagogical aspects in activity of Lithuanian Catholic Gymnasia in 1918–1940 and 1990–2008], Klaipėda, KU leidykla, 2009, pp. 156-157.

[23] P. Subačius, *Dvidešimt penkeri religinės laisvės metai 1988–2013* [Twenty five years of religious freedom 1988–2013], Vilnius, LKMA Naujasis židinys-Aidai, 2015, p. 600.

[24] V. Juškienė, *Lietuvos katalikiškųjų gimnazijų veiklos 1918–1940 m. ir 1990–2008 m. pedagoginiai aspektai* [Pedagogical aspects in activity of Lithuanian Catholic Gymnasia in 1918–1940 and 1990–2008], Klaipėda, KU leidykla, 2009, pp. 157-160.

LKMPA conference, amendments to the statutes of the association were made, and it was reorganised into the National Association of Catholic Schools.[25]

In 2000, a legal safeguard was reached guaranteeing non-state Catholic schools and other schools established by traditional religious communities and offering education according to state standards the same financing as state schools.[26] There was also an appeal to the Ministry of Education and Science to supplement the regulations of the network of schools. These government documents defined the activities of establishment of non-state Catholic educational institutions and their financing: Catholic school students received the same funding as other state and municipal school students.

A very important factor in the recognition of religious education was the regulation of State and Church relationships on the international level. In 2000, the Agreement between the Holy See and the Republic of Lithuania on Cooperation in Education and Culture was ratified. With this document, Lithuania undertook the following concerning Catholic education:

- provide the possibility to choose a course in religion in all state and municipal comprehensive education schools;[27]
- provide the same conditions for teaching Catholic religion as for other subjects;[28]
- provide teaching methods and tools for teaching Catholic religious studies that comply with requirements established by the Catholic Church and the Republic of Lithuania;[29]
- support the activities of Catholic organisations by providing state or municipal school premises and resources;[30] and
- follow the requirements established by the Republic of Lithuania and the Catholic Church when appointing, supervising, and assessing the work of Catholic religion teachers.[31]

The document ensured the right of the Catholic Church to establish educational institutions of different types and levels or to be one of the founders. Establishment of these institutions depended on receipt of written authorisation from the Catholic Church and the Lithuanian legal authorities. Education in

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[25] V. Juškienė, *Lietuvos katalikiškųjų gimnazijų veiklos 1918–1940 m. ir 1990–2008 m. pedagoginiai aspektai* [Pedagogical aspects in activity of Lithuanian Catholic Gymnasia in 1918–1940 and 1990–2008], Klaipėda, KU leidykla, 2009, pp. 86-87.

[26] 'Lietuvos Respublikos Švietimo Įstatymo 15 straipsnio papildymo ir 41 straipsnio pakeitimo Įstatymas' [Republic of Lithuania Law on Supplement of Article 15 and Amendment of Article 41 of the Law on Education], *Valstybės žinios* [State News], 17.05.2000, no. 40-1116, Article 2.

[27] Šventojo Sosto ir Lietuvos Respublikos sutartis dėl bendradarbiavimo švietimo ir kultūros srityje [Agreement between the Holy See and the Republic of Lithuania on Cooperation in Education and Culture], 2000. Available: http://www.lcn.lt/b_dokumentai/kiti_dokumentai/AS-LR—sutartis-svietimas.html, art. 2 (accessed 27.02.20).

[28] Ibid., Article 1.

[29] Ibid., Article 6-7.

[30] Ibid., Article 4.

[31] Ibid., Article 3; 7.

such institutions was required to be conducted according to Catholic doctrine, while subjects of general education would be taught according to a state-approved programme.[32]

The agreement between the Holy See and the Republic of Lithuania stated that state or municipal schools, established together with the Catholic Church, and approved educational programmes in non-state and non-municipal Catholic educational institutions would be funded equally to similar state or municipal schools. Funding of supplementary programmes of non-state Catholic educational institutions was assigned to the founding institution.[33]

School status and dependence on the founders had a direct influence on the formation of confessional schools: formally, state schools could not give priority to any one religion. In this respect, foundation of non-state schools was more favourable as it provided religious education not only to children in a specific geographic area, but also to pupils from all over the country. By the start of the 21st century, the network of schools in Lithuania had been complemented with a quantitatively small, but qualitatively significant segment of confessional schools.

Conclusion

Analysis of sources reveals that restitution of religious education at the beginning of the post-Soviet period in Lithuania was initiated by the clergy and widely supported by congregations. Essential factors for restitution on the national level was entrenching the right to religious education in the Constitution, the Law on Education, and the Law on Religious Communities and Associations. On the international level, educational rights of the Catholic Church were set out in the Agreement between the Holy See and the Republic of Lithuania. These documents provided for and ensured legal integration of religious education into the common educational system and for the foundation of confessional schools and development of their network.

In the early 21st century, both these aspects were already in play: religion was taught in comprehensive schools; curriculum, handbooks, and other methodical materials had been prepared and improved; and the network of confessional Catholic schools was developing. At the time, confessional schools were separated into state and non-state schools founded by two (church and state/municipality) or one (church) founder. Monastic schools tried to re-establish the historical continuity of pedagogical activities of the pre-Soviet era and integrated successfully into the educational system of restored Lithuania and were distinguished in both quantitative and qualitative processes of development of confessional schools.

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[32] Šventojo Sosto ir Lietuvos Respublikos sutartis dėl bendradarbiavimo švietimo ir kultūros srityje [Agreement between the Holy See and the Republic of Lithuania on Cooperation in Education and Culture], 2000, Article 8.
[33] Ibid., Article 9.

Transformations of Structural Divisions of Lithuanian Higher Education Institutions: Case of the Faculty of Pedagogy at Klaipėda University

Aušrinė Zulumskytė

Abstract. Analysis of the development of the Faculty of Pedagogy of Klaipėda University and changes from 1990 to 2004 presents the nature, process, and expression of structural and content transformations in Lithuanian higher-education in the context of academic activities of teachers, researchers, and students. The case of the Faculty of Pedagogy of Klaipėda University was chosen because of the exceptional historical, geopolitical, and academic prerequisites in the initial phase of restoration of Lithuania's independence. The article focuses on the systemic and structural transformation of the Faculty of Pedagogy, touches upon problems of changes in the content of studies, and highlights the positions of professors and students in terms of achievements, negative factors, and future perspectives of the Faculty. Aspects of research, documents, academic literature, and reconstructive presentations of empiric research are employed.

Keywords: higher education, Faculty of Pedagogy of Klaipėda University, transformations, teachers, students

Introduction

Every historical period leaves a mark on the political life of a country as well as on its culture, science, and education. Transformations and challenges faced by society in specific stages of ideological and social turning points are best reflected in statistical indicators and also in the experiences of people and institutions that decide on the significance, relevance, and exceptionality of any given event. Even in a relatively small country like Lithuania with a rather unified system of higher education, during the Soviet era (similar to other Soviet republics), a number of differentiations were observed – specifically, the peculiarities, which had formed in the first half of the 20th century when Lithuania was an independent state. The heritage of 1920s and 1930s predetermined specific transformations in the educational system (partially in higher education and research) in each Lithuanian city and region after the restoration of independence in 1990. The changes that occurred in the Lithuanian higher education system have been analysed from various perspectives by such Lithuanian scholars as Palmira Jucevičienė[1], Lina

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[1] P. Jucevičienė, 'Universitetinės studijos profesinio rengimo kontekste' [University studies in the context of vocational training], *Socialiniai mokslai* [Social sciences], vol. 24, no. 3, 2000, p. 45.

Kraujutaitytė[2], Rimantas Želvys and Rima Žilinskaitė[3], Vaiva Zuzevičiūtė and Margarita Teresevičienė.[4] However, specific aspects of development of a higher education institution or its structural divisions have seldom been analysed in academic literature.

The case of the development and transformations in the Faculty of Pedagogy of Klaipėda University (KU) from 1990 to 2004 is interesting and essential to study from the perspective of academic research, regardless of the various names this institution has had and its distinctive history from establishment in the early 20th century[5] to the end of the Soviet era[6] and after restoration of independence.[7] Throughout the 20th century, this institution trained specialists in education at various levels;[8] therefore it has always been an important part of economic, social, and cultural development processes in western Lithuanian.

My study asks: 1) What challenges were faced by a division (currently the Faculty of Pedagogy of Klaipėda University) specialising in training teachers and committed to the development of education sciences in Lithuania from 1990 to 2004? 2) What were the specific activities in the general context of Lithuanian higher education transformations? 3) How were changes perceived by staff and students?

I analysed academic literature and documents using contrastive analysis and reconstructive analysis of empirical research results.

My primary sources were historical and legal documents that helped reconstruct past events and facts. Research on this topic and memoirs were also analysed, which made it possible to compare different points of view of the authors. In the final stage of the study, I surveyed students and professors, who revealed how events were evaluated by their participants. Research results are integrated, generalized, and grouped by key issues.

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[2] L. Kraujutaitytė, *Aukštojo mokslo demokratiškumo pagrindai* [The foundations of democracy in higher education], Vilnius, Publishing House of Lithuanian Law University, 2002.

[3] R. Želvys, R. Žilinskaitė, 'Aukštojo mokslo ir profesinio rengimo kaita' [Higher education reform in Lithuania: achievements and problems], *Acta paedagogica Vilnensia,* no. 12, 2004, pp. 8-18.

[4] V. Zuzevičiūtė, M. Teresevičienė, *Universitetinės studijos mokymosi visą gyvenimą perspektyvoje* [University studies in the context of lifelong learning], Kaunas, VDU Publishing House, 2007.

[5] O. Tijūnėlienė, *Mokytojų rengimas Respublikos pedagoginiame institute 1935–1939 m.* [Teacher training in the Republican Pedagogical Institute in 1935–1939], Klaipėda, KU Publishing House, 1996.

[6] G. Lukauskienė, A. Zulumskytė, 'Pedagogų rengimo raida Klaipėdoje 1902–1975 metais: nuo seminarijos iki pedagogikos fakulteto' [The development of teacher training in Klaipėda University in 1902–1975: from Seminary to the Faculty of Pedagogy], *Tiltai* [Bridges], no. 11, 2002.

[7] A. Juška, 'Klaipėdos mokytojų seminarijai – 90 metų' [The 90th anniversary of Klaipėda teacher training seminary], *Klaipėda*, 25 September 1992.

[8] *Klaipėdos universiteto Pedagogikos fakultetas 1935–2005* [Faculty of Pedagogy of Klaipėda University in 1935–2005], Klaipėda, KU Publishing House, 2005, pp. 4-5.

Prerequisites for establishment of the Faculty of Pedagogy at Klaipėda University after restoration of independence

Historically, the development of pedagogy at KU was closely linked to Šiauliai Pedagogical Institute (ŠPI). The Faculty of Pre-school Education at ŠPI[9] had expertise in training educators: they employed experienced teaching staff and proved their research potential through long-established and meaningful academic traditions. From 1975 to 1991, the faculty was located at the current Faculty of Pedagogy of KU. Prior to 1991, pedagogy as an academic discipline consolidated its status in Western Lithuania by the Baltic Sea in Klaipėda region.[10] KU Faculty of Pedagogy possesses a specific geopolitical history and regional educational traditions.[11]

Klaipėda underwent structural transformations after the restoration of independence. Lithuania had only one university, Vilnius University, before the National Awakening; all the other academic studies took place in higher education institutions referred to as 'institutes' or 'academies'.[12] During the first stage of higher education reform, most of the institutes and academies were restructured, changing their names, merging, and, thus, establishing new universities and assigning new autonomous functions to separate divisions.[13] In this context, the long-cherished idea of having a university in Klaipėda began.

Some of the most significant prerequisites for establishment of the University included historical, geopolitical, and geographical aspects, which highlighted the changing socio-cultural and economic needs of the region. Additionally, the necessity for decentralisation of research and studies in the country mobilised the potential of higher education, not only in the capital Vilnius but also in other Lithuanian cities.[14]

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[9] G. Lukauskienė, A. Zulumskytė, 'Pedagogų rengimo raida Klaipėdoje 1902–1975 metais: nuo Seminarijos iki Pedagogikos fakulteto' [The development of teacher training in Klaipėda University in 1902–1975: from Seminary to the Faculty of Pedagogy], *Tiltai* [Bridges], no. 11, 2002.

[10] *Klaipėdos universiteto Pedagogikos fakultetas 1935–2005* [The Faculty of Pedagogy of Klaipėda University in 1935–2005], Klaipėda, KU Publishing House, 2005, pp. 4-5.

[11] A. Juška, *Mažosios Lietuvos mokykla* [The school of Lithuania Minor], Klaipėda, KU Publishing House, 2003, pp. 4-10.

[12] A. Zulumskytė, 'Higher Education in Lithuania,' in I. Ķestere, A. Kruze (eds.), *History of Pedagogy and Educational Sciences in the Baltic Countries from 1940 to 1990: an overview*, Riga, RaKa, 2013, pp. 156-163.

[13] 'Law on Science and Studies of the Republic of Lithuania,' *Official Gazette* [State News], 1991, no. 7-191; R. Želvys, 'Aukštojo mokslo plėtra ir akademinė didaktika' [The development of higher education and academic didactics], *Acta paedagogica Vilnensia*, no. 14, 2005, p. 170.

[14] S. Vaitekūnas, *Klaipėdos universitetas. 25 metai mokslo ir kultūros židiniui prie jūros* [Klaipėda University. 25 years for the centre of science and culture by the sea], Klaipėda, KU Publishing House, 2016, p. 20.

The merger of higher-education institutions in Klaipėda resulted in the founding of KU on 1 January 1991.[15] Initially, three faculties were established, and the Faculty of Pedagogy was the most important. The Faculty of Pedagogy served as a foundation for KU because of its strong, independent facilities and its solid academic status as a centre of pedagogical culture and research in Lithuania. Similar to the majority of other universities in the country, KU was established with sufficient material resources and a highly-qualified academic staff.

Despite a strategy of training specialists for the needs of a port town, the supporters of the establishment of KU saw primarily a centre for humanism and culture in the region.[16] Thus, previously acquired expertise and experience of the Faculty of Pedagogy significantly contributed to development of the new university. A significant increase in the number of higher education institutions and students[17] was one of the most tangible results of higher education reform. Higher education gradually turned into a mass phenomenon,[18] as in many other countries of the world.

Academic challenges to the Faculty of Pedagogy

At the start, the KU Faculty of Pedagogy united all the departments of the Faculty of Pre-school Education of the former ŠPI – General Pedagogy, Educational Methodologies, Childhood Pedagogy, Psychology, Art Pedagogy, and Physical Education. The number of academic staff did not change significantly. With the emergence of new higher education institutions in Lithuania, the number of students in the Faculty gradually decreased and numbers of students in individual programmes were modest.[19]

The changes in higher education in Lithuania directly influenced the Faculty and resulted in re-profiling of specialist training. So, the only higher education institution in the country to train pre-school education specialists (with a focus on psychology and music) was forced to close programmes of a narrow scope. Juozas Rauckis, Dean of the Faculty of Pre-school Education at the Klaipėda

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[15] 'Resolution of the Government of RL No. 299 of 28 September 1990 'On Establishment of University of Klaipėda.' Available: https://www.e-tar.lt/portal/lt/legalAct/TAR.DD7490EE8A7E (accessed 12.03.19).

[16] S. Vaitekūnas, *Klaipėdos universitetas. 25 metai mokslo ir kultūros židiniui prie jūros* [Klaipėda University. 25 years for the centre of science and culture by the sea], Klaipėda, KU Publishing House, 2016, p. 25.

[17] 'Švietimas, kultūra ir spauda' [Education, culture and press], in *Lietuvos statistikos metraštis* [Statistical yearbook of Lithuania], Vilnius, Lietuvos statistikos departamentas, 2004, p. 224.

[18] I. Tinfavičienė, 'Istorinė universitetinio aukštojo mokslo sampratos raida' [Historical development of the concept of higher education and its values], *Acta paedagogica Vilnensia*, no. 19, 2007, p. 192.

[19] A. Lukoševičius, *Pedagogikos fakultetas. Klaipėdos universitetas* [Faculty of Pedagogy. Klaipėda University], Klaipėda, KU Publishing House, 2000, p. 134.

branch of ŠPI,[20] noted emerging competition among similar schools of higher education, a truly revolutionary innovation for the academic community of the Faculty: this necessitated a search for programmes that were exceptional and relevant in the labour market and that would immediately train new teaching staff and researchers who were able to teach competently and generate fresh ideas in education.

The possibility of integrated training for primary and pre-school teachers was considered in 1991: five specialisations were planned as well as new specialities in social care and welfare.[21] Although the newly formed Faculty changed its profile, the main purpose – to train highly qualified teachers for Klaipėda and the region of western Lithuania – remained the same. This was a huge challenge because the Faculty of Pedagogy at ŠPI had strong and long-standing traditions in training primary education specialists only. The Pedagogy Faculty became one of the divisions of the newly formed Šiauliai University as a result of the reform.[22]

It should be mentioned that the programme Childhood Pedagogy, which was introduced in the KU Faculty of Pedagogy in 1991/1992, was exceptional and the only one in the country to open new perspectives for the development of new specialities and specialisations as well as for intensified research in the field of education.

Challenges to teaching and research staff and students

The development of pedagogy at KU and reform of higher education as a whole posed many challenges for academic and practical innovations in the field of teaching and research because they took place during general educational innovation in Lithuania. The changes included reorganization of institutions, renaming of specialties and faculties, and adjustment of the system of academic degrees.

The role of education leaders during this period was crucial. Innovation in Lithuania education as a whole was based on the initiatives of Meile Lukšiene[23] and others; Audronė Juodaitytė,[24] for example, led the changes at KU, including childhood social-educational concepts.[25]

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[20] 'Historical Development of the Faculty of Pedagogy of Klaipėda University in 1975–2001. Memories of Professor J. Rauckis about the Period of ŠPI and the Beginning of Establishment of KU,' 2002, A. Zulumskytė's personal archive, Ap. no. 2, p. 1.

[21] 'The Minutes of the Meeting of Supreme Council Presidium of 22 January 1991,' KU Archives, Ap. 1, B. 2, p. 20.

[22] *Šiaulių universiteto Edukologijos fakulteto istorija ir dabartis 1960–2005* [The history and present of the Faculty of Education Science of Šiauliai University: 1960–2005], Šiauliai, ŠU Publishing House, 2005.

[23] M. Lukšienė, *Jungtys* [Connectors], Vilnius, Alma littera, 2000.

[24] Audronė Juodaitytė – Professor, habilitated Doctor – was Head of the Department of Childhood Pedagogy from its establishment in the Faculty of Pedagogy of at KU.

[25] A. Juodaitytė, *Vaikystės fenomenas: socialinis-edukacinis aspektas* [The phenomenon of child-hood: Socio-educational aspect], Klaipėda, KU Publishing House, 2003.

Many scholars worked during the initial stages of the Faculty of Pedagogy; however, new academic realities certain challenges on employees in research institutions. In 1992, the Lithuanian government approved the New Procedure of Nostrification of Research Degrees and Pedagogical Titles and Registration of Diplomas (Certifications).[26] Regulations were introduced that served as basis for reviewing research degrees and titles obtained during the Soviet era: the Candidate of Sciences diploma granted previously was declared equivalent to a diploma of a Doctor of Science and the Soviet Doctor of Science degree was equated to a Doctor Habilitatus degree.[27]

Prominent and nationally recognised scholars in education, who successfully combined their research and teaching activities, worked in the Faculty of Pedagogy of Klaipėda University after successful nostrification. The practice of conducting research while teaching students was a tradition inherited from the Soviet era and gained strength after regaining independence. Today, many university professors must take up not only research, but also teach, which deprives them of the right to choose only one area of activity – research or teaching.[28]

In 2002, the Department of Pedagogy was re-named the Department of Education.[29] Changes in the names of institutions illustrate another significant transformation in Lithuanian education sciences: after restoration of independence, the academic community engaged in intensive discussion regarding new and relevant terms in education sciences, or Pedagogy, as it was called during the Soviet era.[30] Education sciences were renamed 'educology' and added as a branch of social sciences;[31] researchers were referred to as 'educologists'. Pedagogy, a sub-branch in educology,[32] now embraced the concept of education of children and the young generation only.

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[26] 'Resolution of Government of RL No. 549 of 15 July 1992 on Procedure of Nostrification of Research Degrees and Pedagogical Titles and Registration of Diplomas (Certifications).' Available: https://www.e-tar.lt/portal/lt/legalAct/TAR.3882FC59D350 (accessed 14.04.18).

[27] 'Resolution of Government of RL No. 204 of 31 March 1992 On the System of Research Degrees and Pedagogical Titles of the Republic of Lithuania and Procedure of Their Granting,' *Official Gazette* [State News], no. 16-452, 1992.

[28] B. Jatkauskienė, R. M. Andrikienė, *Universiteto dėstytojų veiklos daugiafunkcionalumas profesionalizacijos kontekste* [Multifunctionality of university teachers' activities in the context of professionalization], Klaipėda, KU Publishing House, 2013, p. 36.

[29] 'Apie Pedagogikos katedrą' [On the Department of Pedagogy]. Available: http://www.ku.lt/humf/ pagrindinis/struktura/pedagogikos-katedra/ (accessed 14.03.18)

[30] Discussions were led by prominent scholars as Prof. Dr. habil. Leonas Jovaiša, who was working at Vilnius University. See L. Jovaiša, *Edukologijos įvadas* [Introduction to education science], Kaunas, Technologija, 1993.

[31] 'Resolution of Government of RL No. 1245 of 11 November 1997 on Classification of Study and Research Areas, Fields and Branches.' Available: https://www.e-tar.lt/portal/lt/legalAct/TAR.3BEC81E1B099 (accessed 15.04.18)

[32] 'Order of the Ministry of Education No. 30 of 9 January 1998. On the Classification of Study and Research Areas, Fields and Branches.' Available: https://www.e-tar.lt/portal/lt/legalAct/TAR.6FDAC10F3267 (accessed 14.04.19)

It should be mentioned that promotion of writing and presenting academic publications at the Faculty was also tied to the new Procedures for Attestation of academic staff, which is still valid.[33] According to Klaipėda University documents, every teacher who wanted to get a desirable position in research and teaching at the University had to take part in competitions for specific positions. After winning the competition and working for five years (in some cases, three), the procedure of attestation would assess teaching expertise, professional development data, participation in conferences, the number of national and international publications, and other parameters. For this reason, many academics were forced to teach between four and eight (and sometimes independent) study courses to students in various programmes during one academic year. This assigned a particularly heavy annual teaching load to staff, according to KU-approved teaching load norms, a result of the University's money-saving policies.[34] Therefore, it can be stated that the activities of academics and researchers at the Faculty of Pedagogy were particularly multi-sided and intensive.

Another innovation in Lithuanian higher education institutions was a new procedure for formalisation and justification of programmes, and courses (subjects). For example, programme descriptions were replaced by study modules with detailed descriptions of goals, objectives, and competencies to be developed and learning outcomes to be achieved. In addition, new procedures were also approved: after five years after implementation of a new programme, self-assessment of all established parameters had to be carried out and results had to be submitted for external international audit. A commission of experts from foreign universities evaluated the program, its processes and outcomes, and made recommendations on further development.[35]

Complicated economic conditions at the turn of the 21st century required Faculty of Pedagogy academic staff to complete all that work themselves. They formed workgroups, working after lectures and on weekends, intensively studying documents, writing reports, conducting student opinion surveys, filling in various tables, etc.[36] A similar situation occurred in other Lithuanian higher education institutions, clearly evidence of devotion by academic staff to their mission, diligence, and even sacrifice while seeking to consolidate programmes and ensure their quality.

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[33] 'Resolution of KU Senate No. 11-48 of 5 April 2013 The Description of Procedure for Attestation and Coopetition for Taking Positions of Teachers, Research Workers and Researchers in Klaipėda University.' Available: http://briai.ku.lt/downloads/KU/20130405_11_48.pdf (accessed 15.04.19)

[34] 'Resolution of KU Senate No. 11-52 of 23 May 2003 on Workload Norms and Timesheets of Teaching Load in the Academic Year 2003/2004,' Received documents, 2003, The Archives of Department of Pedagogy, pp. 1-2.

[35] 'Self-assessment Report in the Study Field of Education Science of 2004 in Klaipėda University (2 study programmes),' 2004, The Archives of Department of Pedagogy of KU.

[36] Based on memoirs of the author and faculty members and handwritten notes and memos in personal archives.

It is important to point out that exhaustive methodological and didactic materials were available to teachers working in schools. However, higher education didactics, as a support system for a professor in higher education, evolved gradually and only fragmentarily.[37] The practice of teaching adult learners (andragogy) was underdeveloped, but in the 21st century, the development of adult education as an academic discipline gained momentum and numerous teaching aids and research on the topic were prepared at the KU Faculty of Pedagogy.

The increasing European requirements that determined changes in teaching staff, physical environment, and conditions for education in the 1990s must be mentioned. Academic staff memories indicate that the number of new, integral courses and sources of learning grew (completely new elective courses and compulsory and recommended literature was introduced). Requirements for academic publications increased (publications in foreign languages, especially in English) as did use of new, contemporary methodologies and strategies of research. Mature students chose to study at the Faculty and their insistence on high standards of teaching increased. Concrete course outcomes and assessment criteria were required by students, discussions between students and professors began, and detailed course descriptions were developed.[38] Lecturers had to adjust to a new system of study credits and change to a 10-point assessment system instead of the previous 5-point one. These examples illustrate the intensive and multi-functional activities of teaching staff during this period.

Evaluation of the most significant changes faced by students reveals that some students experienced them as a new transformation if the political changes had occurred during their studies. But newly enrolled students perceived the reforms as causalities. Intensive changes in the subjects and their titles were introduced after 1990: subjects such as the History of the Communist Party of the Soviet Union, Political Economy of Socialism, Basics of Scientific Atheism, Scientific Communism, and Soviet Law[39] were abolished. A lack of new literature sources (particularly in English) was another challenge because the absolute majority of foreign literature was in Russian.[40] Similar to teaching staff, students were also forced to change their usual understanding about

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[37] B. Jatkauskienė, R.M. Andrikienė, *Universiteto dėstytojų veiklos daugiafunkcionalumas profesionalizacijos kontekste* [Multifunctionality of university teachers' activities in the context of professionalization], Klaipėda, KU Publishing House, 2013, pp. 49-50.

[38] 'Historical development of the Faculty of Pedagogy of Klaipėda University in 1975–2001. Memories of Professor J. S. Pocienė about the Period of ŠPI and the Beginning of Establishment of KU,' 2002, A. Zulumskytė's personal archive, Ap. no. 1, 2002, p. 1.

[39] 'Historical Development of the Faculty of Pedagogy of Klaipėda University in 1975–2001. Certification to Diploma MB No. 133263 of Šiauliai Pedagogical Institute (diploma supplement),' 2002, A. Zulumskytė's personal archive, Ap. no. 4, pp. 1-2.

[40] 'Historical Development of the Faculty of Pedagogy of Klaipėda University in 1975–2001. Memories of S. Balčytienė, an employee of the Library of the Faculty of Pedagogy about the Period of ŠPI and the Beginning of Establishment of KU,' 2002, A. Zulumskytė's personal archive, Ap. no. 6, p. 1.

studies in higher education institutions because the system, its structure, and requirements underwent drastic changes.

System and content of studies at KU Faculty of Pedagogy

The year 2000 was marked by an exceptional breakthrough in the entire structure of Lithuanian higher education: the Law on Higher Education of Lithuania was adopted, which provided for a binary system of higher education consisting of a university sector and a non-university sector.[41]

The law determined how university studies, scientific research, and experimental development would be conducted and (or) professional art would be developed in universities. The other type of higher education institutions was colleges that offered studies in and focused on applied scientific research.[42] Thus, colleges were established in Lithuania in 2000, and by 2001, five colleges had opened in Klaipėda.[43] Although many colleges were created from former advanced vocational schools, they were still granted higher education institution status, which meant that some study programmes, including pedagogy, became a source of competition for the University and colleges. Faculty of Pedagogy attempts to solve this problem included shortened study programmes in education sciences that admitted exceptional graduates from colleges.[44]

As early as in 1992, joint doctoral study programmes in Education Sciences and Psychology with other Lithuanian universities[45] were introduced at KU. This was a necessary response to the lack of young, qualified scholars in the University and the need to develop research in academic fields in Western Lithuania. Another exceptional aspect of the Faculty of Pedagogy can be distinguished: by 2001, a complete three-cycle study structure (BA, MA, PhD) had been formed, creating favourable conditions for academic preparation of the highest level.[46]

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[41] 'The Law on Higher Education of RL,' *Official Gazette* [State News], 2000, no. 27-715.

[42] The college is a higher-education institution in Lithuania that provides (non-university) education. Colleges pay more attention to practice, but the university provides an academic education.

[43] 'Švietimas, kultūra ir spauda' [Education, culture and press], *Lietuvos statistikos metraštis* [Statistical yearbook of Lithuania], Vilnius, Lietuvos statistikos departamentas, 2004, p. 224.

[44] 'Historical development of the Faculty of Pedagogy of Klaipėda University in 1975–2001. Memories of Professor V. Raudys about the Period of ŠPI and the Beginning of Establishment of KU,' 2002, A. Zulumskytė's personal archive, Ap. no. 7, p. 2.

[45] 'Resolution of Government of RL of 7 October 1992 'On Establishment of Doctoral Studies in Research and Educational Institutions.' Available: https://www.e-tar.lt/portal/lt/legalAct/TAR.2CCCC0BDE2CA/TAIS_152147 (accessed 14.04.18).

[46] 'Mokslas ir menas Klaipėdos universitete 2001' [Science and art in Klaipėda University 2001], *Information publication,* vol. 3, Klaipėda, KU Publishing House, 2002.

The three-cycle system, consisting of Bachelor's, Master's and Doctoral studies, replaced the previously implemented integrated studies.[47] By 2001, ten Master's programmes had been registered and implemented: Pedagogy of Preschool Education, Pedagogy of Primary Education, Management of Education, Family Studies, History of Pedagogy, Pedagogical Psychology, Social Pedagogy, Childhood Pedagogy, Pedagogy of Physical Education, and Pedagogy of Religious Education.[48] The Master's study programme was broad[49] and valued highly from the perspective of research and practical professional activity.

Other elements of the programme can also be distinguished: marketable and flexible university study programmes were created involving academic and social partners; particular attention was paid to further development of Master's programmes and continuous study programmes;[50] intensive investment was put into creating additional specialisations in Bachelor's and Master's studies (classroom teacher with additional qualifications in music, arts, English); and development of new programmes in general.[51] In 2002, new Bachelor's programmes were implemented (Education Sciences, Catechetics, and Mathematics and Informatics teaching), and Master's programmes in Adult Education and Arts Pedagogy were submitted for state registration.[52]

In 2003/2004, research and teaching in the Faculty was conducted in eight departments: Childhood Pedagogy, Education, Psychology, Methodologies of Education, Arts Pedagogy, Catechetics, Physical Education, and Social Pedagogy. Researchers in all departments conducted studies in two inter-faculty topics of psychology and education sciences introduced in 2000 – Research on Expression and Development of Education at the Junction of Classicism and Modernism and Research on Social Psychological Development of Children and Young People.[53] Development of Master's studies resulted in considerable attention on research activities of students: in 2000/2001, annual Master's student academic conferences were initiated by professor Ona Tijūnėlienė and associate professor Aušrinė Zulumskytė. Young researchers could present their projects by participating in academic debates and strengthen their research competences.

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[47] Integrated programmes were used by an association or consortium of 3-4 universities to prepare students at the doctorate level in a certain field. For example, four universities, under uniform conditions, trained doctors of educology.

[48] A. Lukoševičius, *Pedagogikos fakultetas. Klaipėdos universitetas* [Faculty of Pedagogy. Klaipėda University], Klaipėda, KU Publishing House, 2000, p. 134.

[49] Broad profile studies meant that a trained specialist could work not in a narrow field but both in science and in practice with a new wide range of knowledge and skills.

[50] Continuing education programs – programs for in-service training, professional development, or for those who wanted/needed to change their profession.

[51] 'The Self-assessment Report in the Study Field of Education Science of 2002 (5 study programmes),' manuscript, 2002, Archives of Department of Pedagogy of KU, p. 8.

[52] Ibid., p. 7.

[53] 'Mokslas ir menas Klaipėdos universitete 2000,' *Information publication,* vol. 2, Klaipėda, KU Publishing House, 2001, pp. 162-186.

The future of the KU Faculty of Pedagogy: opinions of students and professors in 2002

Teacher and student opinion surveys became a tradition in the Faculty of Pedagogy in addition to formal evaluations of academic and artistic activities, minutes of meetings, and self-assessment reports: these allowed identification of positive and negative developments in the Faculty and forecasting of future opportunities. Gražina Lukauskienė's and my 2002/2003 report[54] contains statistical data and participants' comments on the process of education that clearly illustrates some problems. Our survey included nine professors and 85 students, who were divided into two groups on the basis of their study experience. The aim was to gather information on how life in the faculty was perceived and to evaluate its positive and negative aspects. All recipients were provided analogous questions; only generalised tendencies in opinions and insights will be highlighted.

Positive Faculty evaluation. Highly diverse answers were received about what the respondents liked most in the Faculty of Pedagogy. Bachelor's programme students commented most frequently on the qualifications of academic staff, appropriateness of information, and acceptable methods of teaching. Master's programme students emphasised encouragement and motivation received from professors. In general, professors were looked upon as positive examples of learning and coping.

Responses from academic staff showed that the historical environment of the Faculty was important to the majority as teacher training had been organised in the Faculty since the beginning of the 20th century. They also stressed the introduction and development of exceptional programmes in the Faculty, specifically the integral Bachelor's programme of Childhood Pedagogy and the interesting and relevant specialisations in Bachelor and Master's studies.

With regard to the relationship between students and their professors, Bachelor's programme students most frequently mentioned tolerance and sincerity of the academic staff and that they felt appreciated as individuals. Master's programme students frequently mentioned positive mutual collaboration, particularly the professors' understanding that the majority of Master's programme students were working people.

The professors frequently stated that they appreciated mutual openness and collaboration, emphasising that during the Soviet era, relationships between students and teachers were almost exclusively formal.

Negative evaluation of the Faculty. A variety of negative opinions were revealed about the Faculty. Students of all levels referred to insufficient literature and poor learning facilities, i.e., unavailability of equipment, special laboratories, and computers. Some student respondents singled out non-objective evaluations and assessments as a negative factor. Master's programme

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[54] A. Zulumskytė, G. Lukauskienė, 'Pedagogikos fakulteto studentų ir dėstytojų tyrimo ataskaita (2002/2003 m.m.)' [The reports on opinion surveys of teachers and students of the Faculty of Pedagogy in 2002/2003], manuscript, Archives of Department of Pedagogy of KU, pp. 1-15.

students elaborated on issues of the quality of studies stating that they were too theoretical. Also, overlapping of subjects in Bachelor and Master's programmes was criticised. Despite the fact that a considerable number of teachers and students pointed to very democratic and constructive relationships, about one fourth of the respondents indicated teacher arrogance and barriers in communication such as supremacy of their knowledge and their position.

Such positive and negative evaluations must have been influenced by personalities – personal qualities and specific actions of teachers with whom the respondents communicated and worked. Problems of devising timetables in Bachelor's studies and other organisational shortcomings were mentioned among the difficulties encountered by students.

The survey of professors indicated that the growing number of full-time and part-time students who studied and worked simultaneously was considered a problem. According to academic staff, this impeded consistent learning, high achievement, and solid professional preparation.

One question was related to evaluation of academic traditions in the Faculty. Student life in the Faculty in 1990 was rich in events and quite colourful: artistic amateur collectives, professional festivals, contests, sports festivals, freshmen inauguration, "medium" studies events[55] and other activities[56] were not in short supply. Over the course of time, as students needed to combine studies with work, student traditions gradually deteriorated: although more than half of the students expressed a positive opinion about student life, as many as one third of them stated that they were not well informed about student festivals or did not have time to take part in student activities. Students agreed unanimously about the necessity for new traditions and new events, but none of the respondents gave any concrete suggestions. This may have been influenced by a shift in social activities, which was linked to economic realities rather than student self-realisation.

The absolute majority of professors felt some nostalgia for previous pro-activeness of students and claimed that current students lacked activity and initiative. Regarding the challenges encountered in their work, professors did not emphasise their teaching and research workload, poor working conditions, or low wages that fell even more during the economic recession. This manifested in enthusiasm and devotion by academic staff for their work and a sense of responsibility towards students. This correlates with other memoirs of staff members.[57]

Attitude towards the future of the Faculty. More than half of the students in the Bachelor's study programme expressed optimistic views about the future of the Faculty in 2002: they believed in the future economic prosperity of

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[55] The 'medium' – students' traditional festival to celebrate the half-term practiced in Medieval times.

[56] 'Historical development of the Faculty of Pedagogy of Klaipėda University in 1975–2001. Memories of Professor L. Žukauskienė about the Period of ŠPI and the Beginning of Establishment of KU', 2002, A. Zulumskytė's personal archive, Ap. no. 5, p. 2.

[57] Ibid.

the Faculty, renovation of a nice historical building, and introduction of new specialities. Master's students were divided: only one-third of the respondents evaluated academic and research possibilities positively, and 40% of the respondents were sceptical. They expressed concern about demographic tendencies and the fall in the number of children (potential pupils) and, consequently, about the decline in teaching opportunities.

Academic staff targeted a more general range of problems and were more positive: professors were more optimistic compared to the students. The majority of respondents pointed out that despite the fact that the Faculty was going through a complicated period, the number of trained teachers was large and not everybody could find a job. In addition, faculty members noted that it was necessary for western Lithuania to have a centre of academia and culture. Staff members emphasised that it was necessary to retain long-established traditions of teacher training and expertise and to be flexible to new requirements and challenges of the labour market in a changing economic and political situation.

Conclusion

The most significant prerequisites for the establishment of Klaipėda University and the Faculty of Pedagogy include historical, geopolitical, and geographical factors, which highlighted changing socio-cultural and economic needs of Western Lithuania, resulting from the decentralisation of science and studies and mobilisation of potential for higher education in regional Lithuanian cities.

After 1990, the newly established Faculty of Pedagogy changed its focus but the long-established strategy for training highly qualified educators for Klaipėda and its region remained. Among the most serious challenges imposed on the faculty were unusually competitive conditions between higher education institutions offering similar courses of study, the necessity to search for study programmes that were exceptional and relevant for the labour market, and prompt preparation of new academic staff who could teach and research in a competitive way.

Academic authorities played a significant role in Lithuanian higher education and in the development of the Pedagogical Faculty of KU in the 1990s: they made numerous positive decisions that contributed to bringing pedagogical higher education closer to global progressive and innovative practices.

By 2004, the community of the Faculty of Pedagogy of KU encountered numerous changes, which turned into difficult challenges. Faculty professors had to adapt to heavy teaching loads, meet new requirements for research publications, improve their competences by developing new study programmes, implement new requirements for descriptions of subjects, self-assess programmes, and develop student assessment. The staff and their devotion to academic activity had a significant impact on the development of education sciences and successful work with students. During the tense economic period in the country, the activities of such individuals became positive examples to

students, who also made attempts to adjust to new requirements in the study processes in higher education institutions.

Analysis of the data collected in the academic year 2002/2003 revealed positive and negative aspects in academic processes. Collaboration with professors and good interpersonal relations were mentioned among the most significant achievements. Participating professors emphasised the emergence and development of new, even exceptional, programmes in the Faculty. Students pointed out insufficient literature and excessive theorisation of studies as challenges encountered. Many professors expressed concern regarding issues of study quality because of students' needs to combine studies with work. They also expressed concern about declining academic traditions and insufficient student activity. It should be emphasised that the majority of members of the Faculty community expressed positive expectations about the future of the Faculty.

However, it is also necessary to note that after 2004, when Lithuania joined the European Union, the strategic objectives of higher education institutions, curriculum, and forms of studies underwent other significant qualitative and quantitative changes. Transformations that occurred in Lithuanian higher education from 1990 to 2004 and specifically in one division of a regional university can be regarded as intermediate events that are projections of future possibilities.

Chapter II

What Should We Learn for Democracy? Curriculum Changes

Estonian Curriculum: Becoming Independent

Ene-Silvia Sarv and Vadim Rõuk

Abstract. Curriculum reform was part of educational reform that began in Estonia in 1987. Analysis of archival, legislative, and textual materials, including earlier research papers and interviews of key persons was completed primarily through content analysis. The lack of curriculum specialists in Soviet republics required use of all existing intellectual potential for the creation of an original, modern, and national curriculum based on local traditions. Parallel to attempts to create an independent, social-constructivist curriculum in Estonia in the early 1990s, there was a desire to preserve "best traditions" from the Soviet programmes and methodology. Confrontation between the two educational paradigms manifested both at the organisational level and in the perception of actors. Renouncing Soviet ideology and traditions in subject programmes and development of comprehensive curriculum was a crucial turning point towards independence in education and educational thinking in Estonia.

Keywords: reform of education, Estonian national curriculum, personal experience

Introduction

Curriculum development is undoubtedly at the heart of school and educational reform. Yet, school and educational reform was/is an important aspect of securing national identity and sustainability. The development of Estonian national school curricula from 1987 until after the rebirth of the state in 1991 reflects paradigmatic theoretical and inconsistencies. The periods 1987–1991 and 1992–1996 differ radically in a historical-political-economic view. The first was similar to the National Awakening and quest for sovereignty (1850–1918), including education.[1] This period was characterised by intense participation and processes, resulting in the emergence and amplification of different ideals. Our study described the transition period[2] from the Soviet model to a new state of culture, economy, education, and national curricula.

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[1] J. Orn, 'Sada aastat Kasvatuse ja Hariduse ilmumisest' [One hundred years since the publication of the Education and Upbringing magazine], *Õpetajate Leht* [The Teachers' Newspaper], 27 January 2017. Available: http://opleht.ee/2017/01/sada-aastat-kasvatuse-ja-hariduse-ilmumisest/ (accessed 19.02.20).

[2] M. Lauristin, P. Vihalemm, 'Recent Historical Developments in Estonia: Three Stages of Transition (1987–1997),' in M. Lauristin et al. (eds.) *Return to the Western World. Cultural and Political Perspectives on Estonian Post-Communist Transition*, Tartu, Tartu University Press, 1997, pp. 73-127.

One of first attempts to analyse processes and ideas of educational renewal in a contemporary context was published in two collections of theoretical articles and projects in 1991.[3] In *Some thoughts about 'the correct educational ideology,'* Peeter Kreitzberg stated that globally, we can see "the continuing decline of the so-called scientific curriculum, which in a sense reflects the consequences of the reversal of the industrial revolution, of the domination of a positivist think-tank in the wider perspective of the design of education, including general education and curricula."[4] In principle, this "rejection" was also reflected in curriculum development in Estonia and in several other former Soviet republics, including Russia, in the 1980s and early 1990s.[5]

The renewal of education and the process of curriculum development in Estonia is discussed in several doctoral and master's theses[6] and overviews[7]

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[3] E. Grauberg (ed.), *Hariduse kavandamise metodoloogilistest ja sotsiaal-majanduslikest lähtealustest* [Methodological and socio-economic background to educational planning], Tallinn, EV Haridusministeerum, 1991; E. Grauberg (ed.), *Hariduse kavandamise kultuur-filosoofilistest lähtealustest* [On cultural-philosophical background of educational planning], Tallinn, EV Haridusministeerium, Eesti Õppekirjanduse keskus, 1991.

[4] P. Kreitzberg, 'Mõned mõtted seoses "õige haridusideoloogiaga' [Some thoughts about "the right educational ideology"], in E. Grauberg (ed.), *Hariduse kavandamise metodoloogilistest ja sotsiaal-majanduslikest lähtealustest.* [Methodological and socio-economic background to educational planning], Tallinn, EV Haridusministeerium, Eesti Õppekirjanduse keskus, 1991, p. 8.

[5] E. D. Dnjeprov, *Shkolnaya reforma mezhdu "vchera" i "zavtra"* [School reform between "yesterday" and "tomorrow"], Moskva, RAO FIPO MORF, 1996.

[6] P. Kreitzberg, *The Legitimation of Educational Aims: Paradigms and Metaphors*, Lund, Lund University, 1993; P. Kreitzberg, 'Õppekava koostamine on kompromisside otsimise kunst' [Creating a curriculum is the art of compromising], *Riigikogu Toimetised* [Journal of the Estonian Parliament], no. 14, 2006. Available: http://www.riigikogu.ee/rva/toimetised/rito14/artiklid/05kreitzberg.htm (accessed 15.05.08); V. Nagel, *Hariduspoliitika ja üldhariduskorraldus Eestis aastatel 1940–1991* [Education policy and general education organisation in Estonia in the years 1940–1991], Tallinna Ülikool, 2006; E. Veenpere, *Eesti haridusuuendus 1987–1998: probleeme ja võimalusi* [Estonia – educational renewal 1987–1998: problems and opportunities], Tartu Ülikool, 1999.

[7] E.g., V. Ruus, E.-S. Sarv, 'Changes in Estonian Curricula (1987–1999) and Some Thoughts on the Future,' in B. T. Beck, A. Mays (eds.), *Challenge and Change in Education: the Experience of the Baltic States in the 1990's,* New York, Nova Science Publishers, 2000, pp. 141-152; V. Rõuk, 'Curriculum History and Planning: Theoretical Framework and Some Guidelines of Its Development in Estonia, 1987–1996,' *Acta Paedagogica Vilnensia,* no. 31, 2013, pp. 19-29. Available: http://www.zurnalai.vu.lt/acta-paedagogica-vilnensia/article/viewFile/2518/1728 (accessed 24.10.18); M. Oja. *Muutused üldhariduskooli ajalooõpetuses alates 1987. aastast – nõukogulikust tänapäevaseks* [Changes in history teaching in general education since 1987 – from Soviet to modern], Tallinn, Tallinna Ülikool, 2016; U. Läänemets, Content Development for Estonian General Comprehensive Schools: Context, Curricula and School Practice 1991–2016. In: V. Lubkina; S. Usca (eds.). *Education Reform in Comprehensive School: Education Content Research and Implementation Problems*, Rezekne, Rezekne Academy of Technologies, 2017, pp. 53-61, Available: http://journals.rta.lv/index.php/PSPI/article/view/2182 (accessed 20.02.20); U. Läänemets, *About the Evolution of the Content of Education and School Curricula in Estonia,* Tallinn, Jaan Tõnissoni Instituut, 1995; V.-R. Ruus, 'Eesti õppekavareform 1987–2002' [Curriculum reform 1987–2002 in Estonia], in A. Liimets, V.-R. Ruus (eds.), Õppimine mitmest vaatenurgast [Learning from different viewpoints]*, Acta Universitatis Scientiarum Socialem et Artis Educandi Tallinnensis: A24 Humaniora*, Tallinn, TPÜ kirjastus, 2004, pp. 13-33;

on theoretical-philosophical, substantive, and applied aspects. In general, researchers (Viive-Riina Ruus, Mare Oja, Urve Läänemets, Edgar Krull, Karmen Trasberg, Rain Mikser, Vadim Rõuk, Juta Jaani, Maria Jürimäe, Ene-Silvia Sarv, Vadim Rõuk, etc.) considered Estonian curricular reform as:

- A series of historical events and a political process;
- The process of shaping the foundations and principles of curriculum and of common/shared education values;
- Conceptual change;
- Discursive practice (re-establishment of the discursive subject – Estonian nationality and national education; the emergence of self-determining personality and school, the formulation of a constructivist learning approach); and
- A knowledge creation process.[8]

The concepts of and approaches towards the curriculum development process reveal the existence of various, partly contradictory ideas and options. Rarely is the whole approach to the study of curriculum and its development historical, considering the participants' subjective views, or deal with school level processes.

Approaches to the history of curriculum reform vary in perspective. Cuban[9] describes 20th century curriculum reforms in the United States as a failed tool for changing student behaviour and knowledge. He notes, however, that the curriculum development process is one of the few in which various groups from democratic communities and societies with differing views and values can debate about their desires for future generations. There are contrasting approaches of research: child growth/upbringing-centred; law-centred;[10] standards-outcomes centred; and practice, social regulation and power-centred.[11]

It is important to note that Estonia was the crossing-point of cultures for centuries: German, Northern European/Swedish, Russian and Anglo-American. This influenced educational theory, practice, and curriculum development, especially in the late 20th century. Soviet subject programmes reflected

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T. Tenno (ed.), *Curriculum Theory, Practice and Active Learning in Changing Societies: the 2nd International Conference, September 12–14*, Tartu, University of Tartu, 2002; E.-S. Sarv, *Demokraatiast ja humanismist õpetajale: Eesti haridusuuendus – hariduse demokratiseerumine ja humaniseerumine* [On democracy and humanism for teachers: Estonian educational innovation – democratisation and humanisation of education], Tallinn, Riiklik Eksami- ja Kvalifikatsioonikeskus, 1997.

[8] E.-S. Sarv, *The Learning Organisation and Knowledge Management (LOKM) Model of School and Typology of Estonian Schools*, 2005. Available: http://www.leeds.ac.uk/educol.htm (accessed 12.02.20).

[9] L. Cuban, 'The Lure of Curricular Reform and Its Pitiful History,' *The Phi Delta Kappan*, vol. 75, no. 2, 1993, pp. 182-185.

[10] D. Tyack, T. James, A. Benavot, *Law and the Shaping of Public Education 1785–1954*, Madison, University of Wisconsin Press, 1987.

[11] T. S. Popkewitz, 'The Production of Reason and Power: Curriculum History and Intellectual Traditions,' *Journal of Curriculum Studies*, vol. 29, no. 2, 1997, pp. 131-164.

German *Bildung* and *Didaktik* influences as did Soviet pedagogical practices. The formation of Estonian curriculum in the 1980s and 1990s were most influenced by the ideas and work of Estonians Heino Liimets, Johannes Käis; Americans Hilda Taba, John Dewey, and James W. Botkin;[12] and Soviets Lev Vygotski, Aleksei Leontiev, Vasili Davydov and Daniil Elkonin (developmental teaching).[13]

Curriculum development involves and affects a large number of people. In addition to enthusiasm and innovation, the impact/occurrence of "circulating stereotypes" is highlighted: parents, teachers, and officials expect and reintroduce their experience, despite declaring something else. Sometimes, curriculum development and implementation processes do not lead to an increase in the professionalism of the teacher, as expected.[14] But new curriculum – development of general competences of students and active teacher participation in school-curriculum development processes – are appreciated/adapted and implemented by 75% of teachers.[15]

This indicates potential conflict inside the process itself and between curriculum applications and perceptions of the process. These contradictions can differ during various stages of society and curriculum development. Certainly, it is a problem of the reciprocal relationship between an ideal vision and reality.

The main purpose of our paper is to explain and analyse the process of changes and development of curriculum for Estonian general education during the critical period of regaining independence: 1) What is the timeline and what are the key events in the curriculum development process and the substantive divisions? and 2) What is the perception of key events by participants and observers?

Development of the Estonian curriculum should be considered as a whole, starting with the breakthrough in 1987 (ESSR Teacher Congress, expert meetings, basics of curriculum plans and concepts) through to the establishment of a national curriculum in 1996/97 and to this day. Our focus is on 1990–1993, which is sometimes described as "the curricula wars."

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[12] J. Botkin, M. Elmandjira, M. Malitza, *No Limits to Learning: A Report to the Club of Rome,* Oxford, Pergamon Press, 1979.

[13] A. Savik, 'Õpilaste iseseisev töö PTUI uurimisprogrammmis' [Students' independent work in the research programme of PIPR], *Kooliuuenduslane* [School Innovator], no. 3-4, 1999, p. 20.

[14] M. Erss, et al., 'Teachers' Views of Curriculum Policy: The Case of Estonia,' *British Journal of Educational Studies*, vol. 62, no. 4, 2014, pp. 393-411.

[15] E.-S. Sarv, *Õpetaja ja kool õpilase arengu toetajana. Õpetaja enesest ja koolist* [Teacher and school supporting pupils' development. Teacher about her/himself and about school], Tallinn, Tallinna Ülikool, 2008, p. 91.

Methodology, research instruments, sources, background and evaluation

This study is historical, based on analysis of documents, publications, and personal reflections related to curriculum development for Estonian general education. Historical "research includes reconstruction from a holistic perspective of the past to achieve a better or new understanding of events."[16] We use an historical approach in the frame of systems theory[17] to understand curricula development and experience phenomena. General education curricula is considered the centre of a dynamic system that involves institutions, organisations, persons, activities, and theoretical-paradigmatic aspects related to the curriculum process. Flood points out that the soft systems theory often overlooks the problem of power and social change resulting from the monopolisation of knowledge.[18] We deliberately take this into consideration.

We suppose that the development story of the curriculum reflects conflicting organisational, theoretical-historical, and implementation views and that at different levels of the system, the perceptions of individuals/actors in the reflection/understanding of the whole process is partial and does not cover the entire system.

Primary sources are documents from the Tallinn University Estonian Pedagogical Archives and Museum, the Estonian National Archives, and interviews,[19] conversations, notes, and memoirs of curriculum developers and users.

Findings: The story of Estonian national curriculum

First, we look at the general background of curriculum development. The second part deals with curriculum initiative and development (1987, 1989, 1996). The third part describes five turbulent years of the competing EED curriculum. The fourth part of our findings explores the critical events via personal experiences.

The process of development of the national curriculum cannot be understood without taking into account Soviet-era heritage and the intensive, broad-based process since the Teacher Congress of 26 March 1987. For decades, the ESSR had been the initiator and test site for new education models (e.g. polytechnic instruction, in-depth subject classes and schools, specialised classrooms with

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[16] L. Cohen, L. Manion, K. Morrison, *Research Methods in Education,* London, Routlege Falmer, 2000.

[17] A. J. Romiszovski, 'Systems Approach to Design and Development,' in T. Husen, T. Neiville Postlethwaite (eds.), *The International Encyclopaedia of Education*, New York, Elsevier Science, 1994, pp. 5895-5901.

[18] R. L. Flood, *Rethinking the Fifth Discipline: Learning within the Unknowable*, London, Routledge, 1999, p. 60.

[19] Seven people were interviewed from 2011 to 2015. Inge Unt, Viive Riina Ruus (1936–2018), Ene-Mall Vernik-Tuubel, Mari Kadakas, Sulev Valdmaa, Ants Eglon and Väino Rajangu, interviews by Vadim Rõuk and Rain Mikser. Personal archives of Vadim Rõuk.

equipment for teaching a particular subject, remedial classes, etc.).[20] Teacher Research Courses, PIPR,[21] and regular lifelong professional development[22] had created a basis for the emergence and implementation of new ideas. In the particularly intensive early years of Estonian education renewal, more than 1000 people were actively involved in the design and development of national education[23] – teachers, methodologists, researchers, and officials. They were assisted by at least 5000 people who participated in major teacher and educator forums and were involved at the school level.[24]

The dramatic nature of the changes and how they were perceived can be illustrated with two examples.

First, on 11–12 May 1988, the 'Pedagogical Science for Educational Innovation' seminar was organised by the steering group for educational reform. Representatives of the USSR Pedagogical Academy and other institutions participated. The terms "subject schizophrenia" and "subject idiotism" were used to describe the system and existing study plans, syllabi, and teaching paradigm. Even ten years later, teachers recalled the 1987 Congress and the Seminar as top-experiences – a personal paradigm change.[25]

Second, in the *Chronology of Estonian School and Pedagogy*,[26] 15 events are mentioned in 1987 such as the 300th performance of the most favourite musical for children. However, events absent were the Teacher Congress on 25–26 March, reform concept-oriented expert meetings, a think-tank in May, curriculum and reform plans competition in June, etc.[27] Professor Unt reminisced: "A real

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[20] I. Ķestere, et al., 'Schools of General Education,' in I. Ķestere, A. Kruze (eds.) *History of Pedagogy and Educational Sciences in the Baltic Countries from 1940 to 1990: an Overview*, Riga, RaKa, 2013.

[21] PIPR – Public Institute of Pedagogical Research – was established at the State Teacher In-Service/Professional Development Institute in 1972 and replaced Teacher Scientific Research Courses (seminar) Ühiskondlik Pedagoogika Uurimise Instituut (ÜPUI). STPDI (*VÕTI*) – State Teacher In-Service Training Institute, or State Teacher Professional Development Institute.

[22] Teacher professional development had special 4-week courses for teachers with various pedagogical experience: pedagogy (3-5 years of pedagogical experience), psychology (~10 years), subject area (~15 years), advanced pedagogical and psychological studies (20 years or more). The courses were organised by STPDI.

[23] E.-S. Sarv, 'Tegevused' [Activities], in *Demokraatiast ja humanismist õpetajale: Eesti haridusuuendus – hariduse demokratiseerumine ja humaniseerumine* [On democracy and humanism for teachers: Estonian educational innovation – democratisation and humanisation of education], Tallinn, Riiklik Eksami- ja Kvalifikatsioonikeskus, 1997, pp. 56-60.

[24] Numbers are based on journals, registration lists, etc. held by the Ministry of Education or others institutions that organized the forums.

[25] E.-S. Sarv, *Muutused hariduses 1985. aastast tänapäevani. Üliõpilasprojekt* [Changes in education from 1985 to today. Student research project], Narva, TÜ Narva Kolledž, 2012. Available: https://www.scribd.com/doc/147151808/Muutused-hariduses-1985-tanapaevani-Uliopilasprojekt-Toim-E-S-Sarv (accessed 20.02.20).

[26] H. Rannap (ed.), 'Eesti kooli ja pedagoogika kronoloogia' [Chronology of Estonian school and pedagogy], 2002/2012. Available: https://pdfslide.net/documents/eesti-kooli-ja-pedagoogika-kronoloogia.html (accessed 20.02.20).

[27] See Introduction of this volume, and E.-S. Sarv, 'Tegevused' [Activities], in *Demokraatiast ja humanismist õpetajale: Eesti haridusuuendus – hariduse demokratiseerumine ja humaniseerumine*

sense of excitement arose after the congress and brainstorming sessions were organised: seminars, gatherings, the whole innovation so far was gathered."[28]

New national and subject curricula were created in 1987–89, but reforms were under attack by opposition in the ESSR and Moscow. To support Estonian school sovereignty, the Estonian Education Platform[29] was created and presented at the USSR Congress of Educators in Moscow in 1988. It identified the basics for educational reform: 1) democratisation of educational organisation, 2) humanisation of education content, and 3) value of education. Study programs would be structured as curriculum-type programs, providing for student-teacher collaboration and active involvement of all actors in education and educational decision-making.

This period and the first years of independence encouraged various ideas and increased information gathering, including scientific-philosophical educational literature and contacts with foreign specialists. This led to controversial and even conflicting developments in the conception and development of general education curricula.

The development of Estonian National Curriculum

From 1984 to regaining independence 1991, major changes included:[30]

1984 – change to 12-year general education;

1987 – national school and curricula developments and changes;[31]

1989 – first version of national subject curricula published; and

1989–1991 – further development of curricula, especially in "sensitive" subjects such as history.

After regaining independence in 1991:

1991–1993 – competing curricula projects ("curricula wars");

1996 – adoption of the National Curriculum; and

2002 – new version of National Curriculum.[32]

[On democracy and humanism for teachers: Estonian educational renewal – democratisation and humanisation of education], Tallinn, Riiklik Eksami- ja Kvalifikatsioonikeskus, 1997, pp. 56-60.

28 Inge Unt, interview by Vadim Rõuk, March 3, 2011. Personal archives of Vadim Rõuk.

29 E. Kareda, et al., *Eestimaa haridusplatvorm* [The Education Platform], Tallinn, Teacher In-Service Institute, 1989, pp. 11-15. The Education Platform was prepared for the representation of the reform of the Estonian general education (school-experiment) at the USSR Teachers' Congress in 1988 as the platform for the ESSR delegation in Moscow. It was also published in Russian and was distributed at the All-Union onferences in 1988–1990.

30 V.-R. Ruus, E.-S. Sarv, 'Curriculum Reform as a Challenge to Teacher Identity and Professionalism (the Estonian Case),' paper presented at European Education Research Association (EERA), Helsinki, Finland, 25–27 August 2010.

31 P. Lepik, M. Remmel, E.-M. Vernik, 'Mõttetalgud üldhariduse harimiseks. I vooru reproduktiivne kokkuvõte' [Think tank – expert meeting to educate general education, Reproductive summary of the 1st round], *Nõukogude Õpetaja*, [Soviet Teacher], 29 May 1987.

32 V.-R. Ruus, 'Eesti õppekavareform 1987–2002' [Curriculum reform 1987–2002 in Estonia], in A. Liimets, V.-R. Ruus (eds.), Õppimine mitmest vaatenurgast [Learning from different

We will briefly discuss the initial stages of curriculum development (1987–1990) as it is necessary to understand further development. The focus will be on the emergence of two curriculum models from 1990–1993.

1987 – Estonian national curriculum initiative. The Estonian Teachers' Congress on 25-26 March provided the formal basis for reforming education and establishing the Estonian National School. Meetings and brainstorming sessions were led by a steering team[33] in May and June. The main features of the new national curriculum projects were designed and evaluated through public competitions: on 22–23 June 1987, nearly 400 people evaluated the projects.

The Institute for Pedagogical (Scientific) Research[34] project was selected for further development, and many other projects were used later.[35] One participant noted: "... when this Midsummer Day ended, people were in tears; everyone stood up, hugged and clapped, it was such a [unifying event]."[36] At the same time, volunteer groups were set up to create new syllabi for school subjects, involving a large number of active teachers. By 8 July 1987, a study plan project and explanatory notes were published.

The new school structure was originally based on the model 5+5+2,[37] but in August, a 3+3+3+3 model was established on which the national curriculum of 1996 was based (still valid in 2019). Russian-language schools were also involved in school reform: transition from the universal Soviet 10-year model to an 11- and later 12-year school using Estonian textbooks and programs.

The project gave schools a great deal of freedom in their own curriculum development, so self-management of schools became important. The creation of school curriculum was finalised in the 1996 curriculum and in the Basic Schools and Upper Secondary Schools Act, revealing parallel curricular processes at the school and state level.

In 1987/88, the planning of subjects, textbooks, programs, and curricula paralleled work on the conceptual background of educational reform. Cautious attitudes towards the innovations emerged from academia, the Communist

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viewpoints]*, Acta Universitatis Scientiarum Socialium et Artis Educandi Tallinnensis: A24 Humaniora*, Tallinn, TPÜ kirjastus, 2004, pp. 13-33.

[33] The steering team included Education Minister Elsa Gretchkina and Academy of Pedagogical Sciences of the USSR member Heino Liimets, and representatives of various institutions.

[34] Institute of Pedagogical (Scientific) Research of ESSR – IPR (*PTUI* in Estonian)

[35] V.-R. Ruus, 'Eesti õppekavareform 1987–2002' [Curriculum reform 1987–2002 in Estonia], in A Liimets, V.-R. Ruus (eds.), *Õppimine mitmest vaatenurgast* [Learning from different viewpoints]*, Acta Universitatis Scientiarum Socialium et Artis Educandi Tallinnensis: A24 Humaniora*, Tallinn, TPÜ kirjastus, 2004, pp. 13-33; A. Telgma, 'Eesti NSV Pedagoogika Teadusliku Uurimise Instituut 1959–1991' [The Institute for Pedagogical Scientific Research 1959–1991], *Kooliuuenduslane* [School innovator], no. 1, 1999, p. 18.

[36] Ants Eglon, interview by Vadim Rõuk and Rain Mikser, January 22, 2015. Personal archives of Vadim Rõuk.

[37] This meant 5 years primary + 5 years basic + 2 years secondary education. Until 1988 in Russia and most Soviet republics, the full general education cycle was 8+2, in Estonia and Lithuania 11 (8+3) years.

party, and some educational institutions. Nevertheless, cooperation with progressive educational forces in the Baltic republics and Moscow was so strong that attempts to stop the school experiment remained formal.[38] ESSR Minister of Education Gretchkina issued directives on the implementation of the school experiment in June 1988, and on 1 September 1988,[39] a new and fundamentally different study plan was introduced by 21 schools (Grades 1–12) and by most other schools in 1989.

The drivers of this effort were STPDI and SIPR methodologists. As Kadakas recalls: "The project for the experimental study plan of the Estonian SSR General School was published in *Soviet School*, but the authors were not mentioned. That was the subject of the general debate. For SIPR, there were ... syllabus working groups that re-organised existing syllabi ... according to the principles of the new study plan and the prescribed volume of subject studies."[40] General design of the curriculum took place at SIPR until its liquidation in 1991 and then at Tallinn Pedagogical University. According to Unt, eradication of the Institute was "a very foolish decision that was regrettable." [41]

1989 experimental and the 1996 National curriculum. In 1989, a pilot version of the experimental curriculum[42] was developed by SIPR.

The 1989 experimental curriculum gave schools the freedom to determine their own academic specialty (30% of studies at the secondary level); introduce new subjects in curriculum (such as social studies and health education); decrease of the amount of sciences, math, and Russian-language lessons; increase modern languages and fine arts studies; rid lessons of communist ideology; eliminate "production studies"; introduce a 5-day week (instead of the previous 6 days); and place emphasis on personality development and national cultural values.[43]

The curriculum provided compulsory common content and four branches of the school's choice – general, humanitarian, sciences and economic-technical – as well as methodological expectations. But the study materials were still from the Soviet-era and imbued with Soviet ideology.

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[38] The management of education was consolidated under *perestroika* – instead of two separate ministries and the Vocational Education Committee, one institution was formed – the Committee of Education of ESSR. There was uncertainty about the commitment of new structures and ministers in the National school and curriculum process.

[39] 'Haridusuuenduse dokumendid ja märkmed 1987–1989' [Documents and papers on educational renewal 1987–1989]. Personal archives of Ene-Silvia Sarv.

[40] Mari Kadakas, interview by Vadim Rõuk, March 17, 2014. Personal archives of Vadim Rõuk. Some subject groups were worked on by STPDI or had two parallel developer-groups (physics, for example), and created a new syllabus and content.

[41] Inge Unt, interview by Vadim Rõuk, March 25, 2011. Personal archives of Vadim Rõuk.

[42] *Curriculum*, Tallinn, Ministry of Education ESSR, 1989. In each following year, the books on methodological guidelines and recommendations were published.

[43] V.-R. Ruus, E.-S. Sarv, 'Curriculum Reform as a Challenge to Teacher Identity and Professionalism (the Estonian Case),' paper presented at European Education Research Association (EERA), Helsinki, Finland, 25–27 August 2010.

SIPR researchers prepared a research and development project for a prospective curriculum for General Education (up to 2000), which was discussed and negotiated at various meetings.[44] The Ministry of Education recognised it as a priority.[45]

Despite confrontation and criticism, the National Curriculum was completed and introduced in 1996 instead of 2000. The most important aspects were the holistic vision of Estonia as a democratic and market-based info-society: broad content units organising curriculum content in parallel with subjects and study courses; introducing competencies for defining learning outcomes: introducing cross-curricular themes; and emphasis on permanent change and development of personality, society, and curriculum.[46]

Researchers[47] underlined the freedom and responsibility of schools to specify learning content and determine the number of lessons within the frame set by the National Curriculum. New subjects were introduced – health education and human studies, philosophy, psychology, and family education. Gymnasium subjects were recast as courses (each course equalling 35 lessons). Schools were expected to develop competency-based integrated curricula.

The 1996 curriculum was generally well received (Finnish Ministry of Education, 1999,[48] OECD Education Policy Group, 2001[49]) as a contemporary socio-constructivist curriculum.

ECDE curriculum 1992, 1993; Turbulent years 1989–1993. STPDI was reorganised as the Estonian Centre for Development of Education[50] (ECDE) in 1989, but the statutes did not directly anticipate study of the curriculum. In 1991, the Institute for Pedagogical Research, the ECDE, and the Ministry's General Education Department were charged with providing new versions of the curriculum by the end of 1992. The opportunity to design holistic curriculum documents instead of separate subject syllabi ('programmes' in

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[44] Commission members: I. Unt, G. Karu, J. Orn, U. Läänemets, V. Ruus, A. Eglon.

[45] 'Eesti Vabariigi HM juures töötava teaduskomisjoni koosoleku protokollid' [Minutes of the meeting of the Scientific Committee of the Ministry of Education of the Republic of Estonia], 1990–1999, Tallinn University Estonian Pedagogical Archives and Museum, K0042572, p. 4.

[46] V.-R. Ruus, E.-S. Sarv, 'Curriculum Reform as a Challenge to Teacher Identity and Professionalism (the Estonian Case),' paper presented at European Education Research Association (EERA), Helsinki, Finland, 25-27 August 2010.

[47] U. Läänemets, 'Content Development for Estonian General Comprehensive Schools: Context, Curricula and School Practice 1991–2016,' in *Education Reform in Comprehensive School: Education Content Research and Implementation Problems*, Rezekne, Rezekne Academy of Technologies, p. 56. Available: http://journals.rta.lv/index.php/PSPI/article/view/2182 (accessed 20.02.20)

[48] *Hinnang Eesti õppekavale. Kokkuvõte õppekava üldosa ja ainekavade tugevatest ja nõrkadest külgedest* [Evaluation of Estonia's curriculum. Summary on strengths and weaknesses of the general part and subject syllabi], Opetushallitus, 1999. Available: http://www.curriculum.ut.ee/sites/default/files/sh/soome_hinnang_eesti_6ppekavale.pdf (accessed 10.01.13).

[49] *Riiklike hariduspoliitikate ülevaated, Eesti* [Reviews of National Policies for Education, Estonia], OECD, 2001, pp. 17, 24. Available: http://digar.nlib.ee/show/nlib-digar:9588 (accessed 13.07.17).

[50] 1989–1993, *EHA* in Estonian.

the Soviet era) was immediately seized by the SIPR. Following reorganisation of the institutions, a new type of document in which the authors – all specialists in their respective subjects – made extensive use of research in the field of curriculum theory and practice.[51]

The major change in the renewed curriculum for nine-year basic education was the introduction of a general, explanatory part that reflected ideas pertaining to all subject syllabi.[52]

ECDE specialists compiled the 1992 and 1993 curricula.[53] The main aim was to support and organise the work of teachers and issue streamlined methodological guidelines. Subjects strongly influenced by ideology, such as history and literature, experienced vast changes and new guidelines. The Basic School Curriculum (ECDE, 1992) was an attempt to include pre-primary and basic education into one curriculum.

The Curriculum for Secondary School, published in 1993, defined compulsory common elements for all secondary education institutions[54] and stressed that any curriculum is a social agreement between teachers and the general public. Only in a few subjects were two parallel syllabi presented, and alternative, collectively syllabi were rarely mentioned. The physics[55] syllabus noted that it was an alternative to the Physics Base Program prepared by the School Physics Association.[56] The 1993 Curriculum attempted to be suitable but was clearly still Soviet in its subject-centred orientation. Broader goals for pupil personal development were addressed in only some subject programmes.

51 U. Läänemets, 'Content Development for Estonian General Comprehensive Schools: Context, Curricula and School Practice 1991–2016,' in *Education Reform in Comprehensive School: Education Content Research and Implementation Problems*, Rezekne, Rezekne Academy of Technologies, p. 56. Available: http://journals.rta.lv/index.php/PSPI/article/view/2182 (accessed 20.02.20).

52 E. Krull, R. Mikser, 'Reflection of Cross-Curricular Ideas in the Estonian Curricula of General Education: An Historical Study', *TRAMES*, vol. 14, no. 1, 2010, p. 44.

53 I. Unt, U. Läänemets (eds.), *Põhikooli õppekava* [Curriculum for basic schools], Tallinn, Eesti Hariduse Arenduskeskus, 1992; I. Unt, U. Läänemets (eds.), *Keskkooli õppekava* [Curriculum for secondary schools], Tallinn, Eesti Hariduse Arenduskeskus, 1993.

54 I. Unt, U. Läänemets (eds.), *Keskkooli õppekava* [Curriculum for secondary schools], Tallinn, Eesti Hariduse Arenduskeskus, 1993, p. 1.

55 O. Eenmaa, V. Paju, 'Füüsika' [Physics], in I. Unt, U. Läänemets (eds.), *Keskkooli õppekava* [Curriculum for secondary schools], Tallinn, Eesti Hariduse Arenduskeskus, 1993, pp. 44-45.

56 E. Pärtel, K. Timpmann, H. Voolaid, *Üldhariduskooli programmid. Füüsika. Kontseptsioon ja programmid 8.-12. klassile* [Programmes/syllabi for general education. Physics. Conception and programmes for grades 8-12], Tallinn, Eesti Õppekirjanduse Keskus, 1991, pp. 25-31. These syllabi were designed according to prospective curriculum (and number of lessons) of PTUI 1987 and 1989/90 curricula projects. It is crucial to understand that the School Physics Association created a national concept and intended to create all kits for independent Estonian education (a revolutionary way supported by a large number of teachers and researchers involved). Other approaches intended to use former Soviet concepts and kits for as long as needed.

Critical periods and events – experience in interviews

The overall goal of curriculum change was to reform the educational reality. The quality of reforms, from the point of view of the school environment, is perceived by the performers. Heinla points out that in retrospect, most school directors recalled the 1980s and 1990s as a period of self-determination and great freedom, accompanied by increasingly restrictive regulations: "The best years were 1988–1992 when schools were free to decide on their own."[57] A similar perception emerged in all teacher interviews: at that time, there was freedom to choose methods and adapt learning, although the inappropriateness of textbooks created discomfort.[58]

Mari Kadakas, who was involved in curriculum review noted:

The renewal of the curriculum really started in 1991 and was planned in stages. Great plans for nearly 10 years. ... at that time, it was strange to people … such a long time for this curriculum. In our working groups there were subject-specialists, ... school representatives, representatives of higher education institutions, all bundled together. Certainly, there were over 200 of them … the general goals of learning and education/ upbringing. Interestingly, they were not from the teacher's point of view … but from the pupil's point of view: as a result of his/her studies … how to behave, etc. Then there were curriculum principles that were not previously formulated … Why did we do this [in SIPR since 1987]? ... we did not have to, but we just were interested in this school-innovation. ... this was a purely voluntary thing.[59]

Viive-Riina Ruus noted the sense of responsibility of the task:

In 1989, we did not have any initial tasks … we started ourselves, we did it ourselves, we wanted to have a sovereign curriculum in Estonia. … It was clear that foreign language teaching needed to be reinterpreted, schools needed to be more autonomous ... we also got Saturday free ... It was very important that we had a more general way of thinking, rather than subject-centred. ... And imagine ... from 1987 to 1989, it was two years for the completion of a transitional curriculum through volunteer work. … I would say in this way that the development process of the curriculum actually was developing society broadly, or we say that it was a school of democracy, it was indeed a school of

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[57] E. Heinla, 'Üldhariduskoolide direktorite nägemus õpetajate, lapsevanemate ja õpilaste otsustamisvõimalustest koolielus' [Viewpoints of directors of General Education Schools on the decision-making rights of teachers, parents and students in school life], in E.-S. Sarv (ed.), *Osalusdemokraatia toimimisest Eesti üldhariduses* [The functioning of participatory democracy in general education in Estonia], Tallinn, Tallinna Ülikooli kirjastus, 2008, p. 28.

[58] E.-S. Sarv, *Muutused hariduses 1985. aastast tänapäevani. Üliõpilasprojekt* [Changes in education from 1985 up to today. Student research project], Narva, TÜ Narva Kolledž, 2012. Available: https://www.scribd.com/doc/147151808/Muutused-hariduses-1985-tanapaevani-Uliopilasprojekt-Toim-E-S-Sarv (accessed 20.02.20)

[59] Mari Kadakas, interview by Vadim Rõuk, March 17, 2014. Personal archives of Vadim Rõuk.

reflection-democracy, although at that time we could not yet use such a name. Secondly, it raised the feeling of being involved with teachers. They were responsible for this.[60]

In her interview,[61] Unt took a positive view of these changes and emphasised their connection with the work and aspirations of long time education minister Eisen and academician Liimets. One of the curriculum authors, Valdmaa, said: "It was a well-organised process and it was not possible to isolate curriculum makers in such a way that who did the general part and who did the syllabus, it was a rather synthetic thing, and I would say that Urve Läänemets, who built the whole system, actually trained a number of people in this process to understand what the curriculum is about."[62]

Ants Eglon noted some disconnects: "ECDE requests were related to some incomprehensible ambitions, which essentially separated them from the schools, which in turn created a kind of 'hole' in educational renewal…[63]

Viive-Riina Ruus described the difficulties:

At that time, we did not have literature that we all could now investigate. There were really poor brochures [in Russian] that provided an overview of education in this or that country. They were so small; frankly, there was nothing to find. So, we were forced to think about these things ourselves. … And I thought – how could we cope so well?[64]

So, at the beginning of Estonian independence were three National Curriculum experimental projects and schools experienced the freedom to create school-curriculum.

Discussion and summary: development of the curriculum

The development of the curriculum reflects somewhat contradictory views on individual levels of the system and in the perception of individuals: the reflection of the whole process may reveal partial understanding that did not cover the entire process.

The development of curricula in Estonia (1987–2004) can be summarised in the schematic diagram shown in Diagram 1.

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[60] Viive-Riina Ruus, interview by Vadim Rõuk, March 24, 2014. Personal archives of Vadim Rõuk.

[61] Inge Unt, interview by Rain Mikser, June 13, 2014. Personal archives of Vadim Rõuk.

[62] Sulev Valdmaa, interview by Vadim Rõuk, March 17, 2014. Personal archives of Vadim Rõuk.

[63] A. Eglon, 'Eesti kooliuuenduse kujunemisest' [On formation of Estonian school innovation], manuscript, Tallinn University Estonian Pedagogical Archives and Museum, K43010-3, p. 8.

[64] Viive-Riina Ruus, interview by Vadim Rõuk, March 24, 2014. Personal archives of Vadim Rõuk.
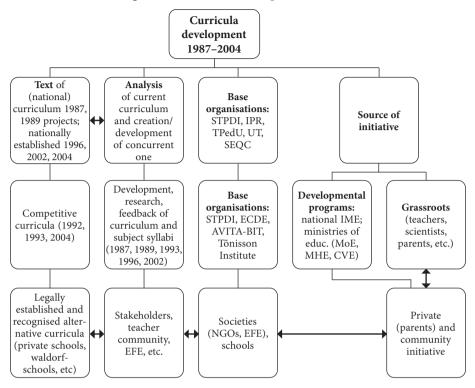
Diagram 1. **Curriculum Development 1987–2004**

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                          ┌─────────────────┐
                          │    Curricula    │
                          │   development   │
                          │    1987–2004    │
                          └─────────────────┘
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Text of (national) curriculum 1987, 1989 projects; nationally established 1996, 2002, 2004	**Analysis** of current curriculum and creation/ development of concurrent one	**Base organisations:** STPDI, IPR, TPedU, UT, SEQC	**Source of initiative**	
Competitive curricula (1992, 1993, 2004)	Development, research, feedback of curriculum and subject syllabi (1987, 1989, 1993, 1996, 2002)	**Base organisations:** STPDI, ECDE, AVITA-BIT, Tõnisson Institute	**Developmental programs:** national IME; ministries of educ. (MoE, MHE, CVE)	**Grassroots** (teachers, scientists, parents, etc.)
Legally established and recognised alternative curricula (private schools, waldorfschools, etc)	Stakeholders, teacher community, EFE, etc.	Societies (NGOs, EFE), schools		Private (parents) and community initiative

Objective versus subjective. Krull's comprehensive analysis[65] considers the Soviet curriculum from 1944 to 1991 without mentioning the comprehensive reform that began in 1987.

Krull does note post-Soviet reforms[66] and the ECDE's reliance on Taba's ideas in curriculum development. The speed of curriculum development and willingness to maximize access to existing systems and materials can be explained by its contrast with the IPR curriculum and previous broad-based curriculum development.

The root causes of the "curricula wars" in the first half of the 1990s and subsequent friction could be found in the 1987–1989 renewal process. The initiators and their supporters were largely motivated to move forward with joint activities and perceived freedom and creativity, all the more so because in

[65] E. Krull, 'Õppekavaülesed ideed Eesti õppekavades' [Cross-curricular ideas in curricula of Estonia], *Haridus* [Education], no. 11-12, 2009, pp. 34-41.

[66] E. Krull, 'Hilda Taba (1902–1967),' *UNESCO. International Bureau of Education. Prospects,* vol. 33, no. 4, 2003, pp. 481-491. Available: http://www.ibe.unesco.org/sites/default/files/tabae. pdf (accessed 27.05.18); H. Taba, *Curriculum Development: Theory and Practice*, New York, Harcourt, Brace & World, 1962.

schools and several subject areas, reform was launched on the basis of new subjects, new assessment, syllabi, study materials, etc.

Estonian education ministers were also part of this dilemma. In his interview, the then Chairman of the Educational Committee Väino Rajangu noted that there were no qualified creators of curriculum in Estonia during the transition period. Therefore, is seemed logical to delegate the activities of some of the actors to others who were, perhaps, better.[67]

Here, we see distrust towards collective knowledge and knowledge-creation[68] and the search for expert judgment and underestimation of democratic, grassroots level participation in favour of top-down governance.

In 2001, the majority of Estonian education ministers, who were asked to highlight five of the most important educational issues, attended a conference dedicated to the opening of the Faculty of Education at the University of Tartu.[69] All of them noted curriculum as one. However, they were divided in defining the problem. Some considered the 1996 curriculum (especially its general part) to be a very good and big step as it decoupled learning from the USSR curriculum to reach a new paradigm. Others referred to the entire curriculum development process since 1987 as a continuation of the USSR curriculum.

Contextual-conceptual. The first years of education reform after the 1987 Teachers Congress were years of searching for a way, a path. The initial ideas of change and their specifics were aimed at the (re)establishment of a national school.

The original curriculum plans[70] included the conceptual foundations of the educational process and democratisation of school. Conceptual innovations and implementation ideas were also reflected in the works of the 1988 Competition for Education Innovation Programmes. Although only some of the programmes were published,[71] several years later they definitely promoted the views of compilers and readers. As Ruus noted[72] about creating a national

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[67] Väino Rajangu, interview by Vadim Rõuk, April, 2015. Personal archives of Vadim Rõuk.

[68] I. Nonaka, H. Takeuchi, *The Knowledge-Creating Company: How Japanese Companies Create the Dynamics of Innovation*, New York, Oxford University Press, 1995.

[69] 'Eesti hariduse viis probleemi' [Five problems of Estonian education], in *Tartu Ülikooli haridusteaduskonna avamisele pühendatud konverentsi ettekanded 1. septembril 2001. a* [Conference devoted to the opening of the Faculty of Education at the University of Tartu on 1 September 2001], Tartu, Tartu Ülikool, 2002.

[70] E. Gretchkina, H. Liimets (eds.), *Na puti k novoi shkole I: shkola Estonskoi SSR v obnovlenii* [On the way to a new school I: the school of ESSR in renewal], Tallinn, ENSV Haridusministeerium, ENSV Pedagoogika Teadusliku Uurimise Instituut, 1987.

[71] E.-M. Vernik (ed.), *Eesti NSV haridusuuenduse programmide ja stsenaariumide konkursi töid I* [Work of the Estonian SSR Educational Innovation Programmes and Scenario Competition, I], Tallinn, ENSV Riiklik Hariduskomitee, 1989; K. Kaldma (ed.) *Hariduse uuendamise võimalusi Eesti koolis. Haridusuuenduse konkursi töid*, [Opportunities for renewal of education in Estonian school. Work of the competition for educational innovation], Tallinn, Haridusministeerium, 1991.

[72] V. Ruus, 'Eesti üldkooli perspektiivse õppekava üldalused' [Principles of the perspective curriculum of Estonian General School], 1992, manuscript, Tallinn University Estonian Pedagogical Archives and Museum, K45089-3, pp. 9, 17.

school through new concepts, new qualities and general and special competences were introduced. Conceptual differences appeared in the 1992, 1993, and 1996 curricula: curriculum and syllabi were focused on teaching or on learning.

Although several aspects of the process can be viewed negatively, further development and performance of the curriculum model was indisputable. It was a long-term, tactical choice, and not just a curriculum war.

Jaani approved of the approach based on the national curriculum: according to Estonian and foreign experts, the 1996 Curriculum continued to express modern educational ideals. It was in line with the educational strategy 'Learning Estonia' and supported the ideal of a global learning society and emphasis on general skills. The values highlighted in the 1996 and 2002 curricula deserve to be continued in the future.[73]

The fast-changing era for curricula was commented on by Hunkins and Hammill:

> Arguing about getting beyond Tyler and Taba is not so much to criticize their work and their era as it is to recognise that we are in different times – times that challenge us to think in novel ways about our realities and how to generate curricula within them. Tyler and Taba reflected a view of modernism: life could be viewed as mechanical and there existed a stable-state universe, the process of curriculum development could be compartmentalized and decontextualized, and goals could be separated from the experiences designed to address those goals.[74]

Although confrontation demanded energy that could have been used more rationally, its positive aspect was also acknowledged: it forced the process of development of national curriculum and considered and reasoned thought about each step.[75]

Conclusion

The field of education from 1989 to 1993 and further – from an organisational, substantive, and political viewpoint – passed through turbulent times.[76] Participants in and critics of the curriculum process accumulated knowledge from previous years of innovation: grassroots and intermediate level support and educational associations emerged and thrived.

One consequence of the Soviet period was the lack of professional expertise in the field of curriculum because of Soviet political centralism. There were

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[73] J. Jaani, 'Õppekavakogemus õpetab' [Curriculum-experience gives a lesson], *Haridus* [Education], no. 11, 2004, p. 14.

[74] F. P. Hunkins, P. A. Hammill, 'Beyond Tyler and Taba: Reconceptualising the Curriculum Process,' *Peabody Journal of Education*, vol. 69, no. 3, 1994, p. 10. Available: http://group4 edci7334curriculmanddevelopment. pbworks.com/w/file/fetch/89838671/Beyond%20Tyler%20 and%20Taba%20(1).pdf (accessed 10.07.17).

[75] Viive-Riina Ruus, interview by Vadim Rõuk, March 24, 2014. Personal archives of Vadim Rõuk.

[76] The vortex-metaphor was used by V.-R. Ruus in her year 2000 writings to characterize this time.

exceptions such as mathematics textbooks for Estonian schools that existed since the 1970s. This facilitated the creation of syllabi and teaching materials for autonomous Estonian schools. However, the general ideology and groundwork for the national curriculum was laid between 1987 and 1988.

In the 2000s, curriculum application studies and their interpretations showed a divergence in the evaluation of curriculum and the quality of its development.[77] This shows that contradictions were and are truly deep and lasting. In some research,[78] discussion of the process of curriculum development is limited and the 1987 and 1989 projects are ignored. This may be due to inadequate or selective coverage of developments during that period.

By 1991, schools could use the experimental curriculum of 1989/90 and had control of school leadership and teachers.

The step-by-step establishment of the National Curriculum was based on contemporary studies and on collective knowledge and ideals of the educational community. The latter included reform year experience of schools and teachers, Estonian education heritage, and feedback. The initiative of many schools and teachers in shaping curricula and syllabi should be stressed, including the creation of alternative and private schools.

Reflections on the curriculum process at the beginning of the 21st century show significant discrepancies: readers interpret texts differently because of differing pedagogical paradigms and perspectives on "good and right education."

These inconsistencies appeared during the curriculum-creation period and were amplified during continuous institutional restructuring. This prolonged process consumed much spiritual strength, time, and money. Yet, the existence of an "opponent" forced the other side to try, analyse, and claim merits and is believed to have improved the quality of the documents. The process of developing a curriculum is a historical, ideological, and symbolic struggle in Estonia. The question remains, how could compromise and commonality between different paradigms be found, and would finding such be possible?

From a historical perspective, the period 1989–1993 was a period of turbulence, characterized by the simultaneous presence of and competition between opposing and contradictory applications and pedagogical and curriculum concept views and paradigms, which were not well understood by the various groups. The school level was characterized by an increasing disagreement between progressive, self-assured and cautious, conservative schools and Estonian and Russian-language schools.

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[77] E. Krull, K. Trasberg, *Changes in Estonian General Education from the Collapse of the Soviet Union to EU Entry,* University of Tartu, Faculty of Education, 2006. Available: https://files.eric.ed.gov/fulltext/ED495353.pdf (accessed 10.07.17).

[78] For example: E. Krull, R. Mikser, 'Reflection of Cross-Curricular Ideas in the Estonian Curricula of General Education: An Historical Study,' *TRAMES*, vol. 14, no. 64/59, 2010, pp. 34-53; M. Lees, 'Estonian Education System 1990–2016: Reforms and Impact.' Available: http://4liberty.eu/wp-content/uploads/2017/04/Mihkel-Lees_Estonian-Education-System-1990-2016_Reforms-and-Impact_Review-6.pdf (accessed 10.07.17).

Finally, it is appropriate to take a small leap to 2017 when the PISA report[79] was published, showing Estonia's high ranking. Ruus stated: "This shows that already at that time, we chose the right direction in principle."[80] After reading his interview, Eglon wrote: "It was still a very difficult and confusing time when you had to fight every day for anything and on a broad front. I am glad that we were able to bring general education in Estonia from socialism to today rather well."[81]

The turbulence of the ideas and power struggle of the transition decade forced people and organisations to learn quickly. The turbulence of openness, innovation, and traditions in the 1980s and 1990s created Estonian independent national education and curricula and was the foundation for 21st century curriculum and school development.

[79] G. Tire, et al., *PISA 2015 Eesti tulemused* [PISA 2015 results of Estonia], SA INNOVE. Available: https://www.innove.ee/wp-content/uploads/2017/11/PISA-2015_EESTI_ARUANNE_FINAL.pdf (accessed 20.02.20); *Estonia in the spotlight. PISA 2015*. Available: https://www.innove.ee/wp-content/uploads/2018/03/PISA_ENG_2015_voldik_web_final.pdf (accessed 15.04.20)

[80] Viive-Riina Ruus, conversation record file, February 10, 2017. Personal archives of Ene-Silvia Sarv.

[81] Ants Eglon to Vadim Rõuk, letter November 12, 2015. Personal archives of Vadim Rõuk.

Development of a National Curriculum for Pre-School Childcare Institutions in Estonia

Tiia Õun

Abstract. The purpose of this article is to provide an overview of the development of the national curriculum of pre-school institutions in Estonia from 1990 to 2004, which also reflects broader changes in the system of Estonian pre-school education. The development of the curriculum is analysed on the basis of legislation and other documents. When Estonia was part of the Soviet Union, it had to follow All-Union programmes. However, in 1968, an original curriculum was introduced in Estonian institutions that had to follow only some general aspects of Soviet programmes. After the restoration of Estonian independence in 1991, new development of the national curriculum began. Significant influence on the development of the curriculum was the implementation of the 'Good Start' programme in 1994 and other non-mainstream programmes. The National Early Childhood Curriculum for pre-school childcare institutions implemented in 1999 set its main goal as the promotion of the child's comprehensive development in cooperation with the home and the childcare institution. Unlike during the Soviet era, childcare institutions began to develop their own curricula based on their pedagogical specialties. In 2002, a study of the curricula revealed several problems in pre-school education such as lack of emphasis on play and time constraints in planning and integrating activities. In 2004, a new and improved curriculum for early childhood education began to be developed. It can be concluded that the development of a curriculum for pre-school childcare institutions in Estonia from 1990–2004 was a democratic process, supported by applied research and leaders of teachers' groups. The Primary Education Framework Programme, implemented in 1999, supported the processes of democratisation of education and the implementation of a child-centred approach in pre-school childcare institutions in Estonia.

Keywords: pre-school education, curriculum, Estonia

Introduction

The question of what pre-school curricula should be is one of the central topics of discussion in contemporary pre-school pedagogy. The curriculum is a comprehensive document throughout the ages, supporting the work of teachers and ensuring smooth transition from kindergarten to school. The goals set for substantive activities show what the pedagogical concept of the childcare institution is and how child-centred education principles are considered in education activities. Internationally, new innovative approaches, such as the use of information technology, have been highlighted, but at the same time, innovations often re-design existing methods and give them new names. The content of pre-school curriculum depends on how the child's development,

the meaning of education, and the role of the teacher in supporting child development are understood by the public. Thus, curriculum content of pre-school education depends on trends in education itself and education in society.

In post-socialist countries such as Estonia, discussions about kindergarten curriculum have been very active in recent decades because since regaining independence, the organisation and content of pre-school education throughout the country has changed in a short period of time. Early childhood education in Estonia developed in the context of European education, and the beginning of pre-school childcare institutions can be seen in 1840 when the first childcare institution was opened in Estonia.[1] The first national kindergarten was opened in Tartu in 1905.[2] During the first Republic of Estonia (1918–1940), no legislative acts were passed on kindergartens. In this regard, Estonia was left behind by several countries where kindergartens were legally regulated. When Estonia was occupied by the Soviet Union, Soviet education programmes began to operate in the entire educational system. However, from 1968 until 1987, many kindergartens worked under a specially designed national curriculum.[3]

The purpose of this article is to present an overview of the development of the state curriculum of Estonian pre-school childcare institutions from 1990-2004. The process of curriculum development is examined in light of trends affecting pre-school education, mainly on content analysis of legislation and other documents.

Development of curriculum for pre-school childcare institutions from 1991 to 1999

As background to curriculum development, it is important to bear in mind the creation of new laws and the impact of economic and demographic change in the entire field of nursery and pre-school education.

After restoration of independence, a new code of education was implemented, which was a time-consuming and difficult process. On 23 March 1992, the Education Act was passed.[4] The following year, four new laws were adopted;

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[1] S. Annist, 'Väikelaste hoiuasutus – Tallinna esimene lasteaed?' [Early childhood institution – the first kindergarten in Tallinn?], in *Vana Tallinn* [Old Tallinn], vol. 10, no. 14, Tallinn, Tallinna Linnavalitsus, 2000.

[2] M. Torm, 'Lasteaednike koolituse kujunemine Eestis' [Formation of kindergarten teachers training], in U. Kala (ed.), *Võimalus ja paratamatus olla* õpetaja [An opportunity and a necessity to be a teacher], Tallinn, TPÜ Kirjastus, 1997, pp. 203-210.

[3] S. Silinciske, M. Torm, V. Jonite, 'An Overview of Kindergarten Development in Lithuania, Latvia and Estonia,' in I. Kestere, A. Kruze (eds.), *History of Pedagogy and Educational Sciences in the Baltic Countries from 1940 to 1990: an Overview*, Riga, RaKa, 2013, pp. 31, 35-36.

[4] 'Eesti Vabariigi haridusseadus' [Education Act of the Republic of Estonia], *Riigi Teataja* [State Gazette], vol. 12, no. 192, 1992. Available: https://www.riigiteataja.ee/akt/30588 (accessed 1 April 2020).

the Law on Pre-school Childcare Institutions was adopted on 9 June 1993.[5] To regulate the activities of pre-school childcare institutions, a new Law on Pre-school Childcare Institutions was passed in 1999, which modernised the legal basis for the activities of childcare institutions: tasks, types, number of children per group, organisation of study activities, financing, teacher responsibility, and assessment.[6] The law stipulated that pre-primary childcare institutions in Estonia are educational institutions that children under the age of 7 can attend. The obligation to provide pre-primary education was given to local authorities; it was also possible to create private institutions. The Estonian language was designated as the language of instruction, but, if necessary, Russian-speaking groups could also be opened.

At the end of the Soviet era in 1990, the birth rate began to drop and the number of children's institutions decreased as a result. If in 1990 there were 767 pre-school childcare institutions in Estonia, then by 2003 there were only 597, of which 26 were private kindergartens (see Table 1). At the same time, the proportion of children attending pre-school childcare institutions increased in corresponding age groups. According to the Statistics Office of Estonia (see Table 1), in 2002, 31.8% of children aged 1 to 2 and 74.6% of 3-year-old children attended kindergarten.[7]

Table 1. **Pre-school education statistics 1990–2003**

Indicators	1990	1995	2000	2001	2002	2003
Pre-school institutions	767	671	646	642	596	597
Enrolled children (thousands)	81,9	60,9	50,6	49,9	49,6	51,3
Percentage of children in childcare institutions aged 1–6	57	56	67	67	67	69
Percentage of children aged 3 to 6 in childcare institutions	68	65	79	80	80	83

A number of reorganisations have been made in the system of pre-school childcare institutions since 1991. Pre-school childcare institutions no longer were under state management and financing but "belonged" to local governments. Laws were passed for the establishment of private kindergartens. Changes in ownership caused financing problems and, to some extent, also resulted in a decrease in the number of childcare institutions.

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[5] 'Koolieelse lasteasutuse seadus' seadus' [Pre-school Establishments Act], *Riigi Teataja* [State Gazette], vol. I-40, no. 593, 1993. Available: https://www.riigiteataja.ee/akt/680867 (accessed 1 April 2020).

[6] 'Koolieelse lasteasutuse seadus' [Pre-school Establishments Act], *Riigi Teataja* [State Gazette], vol. I-27, no. 387, 1999. Available: https://www.riigiteataja.ee/akt/77275 (accessed 1 April 2020).

[7] 'Eesti Statistikaamet' [Statistical Office of Estonia]. Available: http://pub.stat.ee/px-web. 2001/I_Databas/Social_life/02Education/12Preprimary_education/12Preprimary_education.asp (accessed 10 April 2017).

On 20 August 1991, Estonia regained its independence. The main direction of change in pre-school education in 1991–1999 was to replace the collectivist education system typical of the Soviet era with a child-centred approach, taking into account the child's individuality and to create the necessary legal regulations for the activities of childcare institutions.[8]

Curriculum development processes are influenced by broader political trends in society. In the Soviet Union, there were uniform educational programmes for all pre-school institutions. The main goal of educational activities was ideological – communist education, which consisted of collectivism, labour,[9] and patriotic education. In general, Soviet era pre-school pedagogy was characterised by learning activities for which the same curriculum and methods were used throughout the USSR. There were no private educational institutions, and the heads of educational institutions had no opportunity to independently create curriculum.[10] In each Soviet republic, some local preferences could be adapted to the pre-school education programme. In all levels of education in Estonia, the language of instruction was Estonian and textbooks in Estonian were used (except for institutions and schools for Russian-speaking children). However, dissemination of child-centred and democratic ideas was rather difficult and unwelcome.

It should be emphasised that as in many other fields of education, Soviet Estonia achieved a certain degree of freedom in pre-school education by establishing kindergarten programmes and teaching aids. The programme created by the then Minister of Education of the ESSR Ferdinand Eisen (1914–2000) and a more than a 10-member working group was published and adopted (in Estonian) by childcare facilities in 1968.[11] In following decades, it was continuously supplemented both substantively and methodologically, partly due to the need to adhere to the main All-Union precepts (e.g., Russian language instruction in kindergartens) and partly due to methodological work of Estonian teachers and specialists. At the end of the 1980s, Estonian kindergartens used

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[8] K. Kööp, 'Estonia: Socio-historic and Political Influences on the Early Childhood Education and Care System,' in J. Georgeson, J. Payler (eds.), *International Perspectives on Early Childhood Education and Care*, Open University Press, McGraw-Hill Education, 2013, pp. 64-75; A. Ugaste, T. Õun, 'History and Current Situation in the Estonian Early Childhood Education,' in U. Härkönen, E. Savolainen (eds.), *International Views on Early Childhood Education*, Joensuu, University of Joensuu, 2008. Available: http://sokl.uef.fi/verkkojulkaisut/varhais/kehys.htm (accessed 10 April 2017).

[9] J. Tudge, 'Education of Young Children in the Soviet Union: Current Practice in Historical Perspective,' *The Elementary School Journal*, no. 92, 1991, pp. 121-133.

[10] A. Ugaste, T. Õun, 'History and Current Situation in the Estonian Early Childhood Education,' in U. Härkönen, E. Savolainen (eds.), *International Views on Early Childhood Education,* Joensuu, University of Joensuu, 2008. Available: http://sokl.uef.fi/verkkojulkaisut/varhais/kehys.htm (accessed 10 April 2017).

[11] S. Silinciske, M. Torm, V. Jonite, 'An Overview of Kindergarten Development in Lithuania, Latvia and Estonia,' in I. Kestere, A. Kruze (eds.), *History of Pedagogy and Educational Sciences in the Baltic Countries from 1940 to 1990: an Overview*, Riga, RaKa, 2013, p. 35.

the programme 'Pre-school education in childcare institutions'[12] published in
1987. In this programme, Communist education, without which adoption of
the programme would have been impossible, was interpreted as collective and
labour-related education. But unlike the All-Union programmes, play took
the leading role in the Estonian programme. Explanation of labour-related
education covered one and a half pages with explanations of Introducing
surrounding life, Introducing nature, Speech development, Children's literature,
Development of elemental mathematical imagery, Construction, Imagination
activities, Musical education, and Physical education. That was the very content
of the programme.

This curriculum-development practice created the basis for subsequent
innovations in the 1980s and 1990s, using existing ideas, experts, and prac-
titioners.

With the re-establishment of independence, Soviet laws and programmes
lost their validity. It took time to draft new laws, and each kindergarten had to
prepare the necessary basis for itself. As a basis for activities in kindergartens,
former Soviet programmes, experience from other countries, and alternative
pedagogies were considered. Simultaneously, pedagogical ideas prohibited during
the Soviet era were re-discovered. The most well-known was the methodology
of Estonian school innovator and enthusiast of *Reformpädagogik* who was active
in pre-war Estonia Johannes Käis' (1885–1950) complex teaching/learning
system. Käis compiled a methodology of general teaching for schools, but his
ideas were well adapted to kindergartens. The complex teaching/learning system
is based on child psychology. Käis presented principles of childhood, the need
to consider the child's development and interests, and emphasised the need for
integration of school subjects. Käis' approach to general education was based on
domestic culture, the basis of which was theme-based integration of teaching
and individualisation of student work.[13] Many Estonian kindergartens adopted
Käis' principles when compiling their curricula.

In the 1990s, in addition to the Käis method, kindergarten teachers were
interested in various global pedagogical trends. Many went abroad to study
practices of other countries. The teachers were keenly interested in Montessori
and Waldorf pedagogy and went to observe and study those methodologies
abroad.[14] Since 1988, many short and some long-term (up to 4 years) courses
have been organised in Estonia using Montessori, Waldorf and Freinet pedagogy

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[12] H. Sarapuu et al. *Koolieelsest kasvatusest lasteasutuses* [Preschool education in a preschool
establishment], Tallinn, Valgus, 1987.

[13] J. Käis, *Isetegevus ja individuaalne tööviis* [Self-activity and individual work], Tallinn, Koolibri,
1992.

[14] From 1990–1994, several books for teachers and parents were published in Estonian on
Montessori and Waldorf methodologies, e.g., I. Meister, *Avastagem laps. Montessori pedagoogika*
[Let's discover the child. Montessori pedagogy], Tallinn, Valgus, 1994; K. Lukk, *Waldorf-
pedagoogika 1. osa* [Waldorf-pedagogy. Chapter 1], Tallinn, Harjumaa Arenduskeskus, 1991.

principles that were attended by pre-school teachers as well.[15] Teachers began to apply those elements, but there were few kindergartens during this period in which the curriculum was based entirely on Montessori or Waldorf pedagogy.

In general, during the first decade of independence, the pedagogical range of children's institutions and teacher skills expanded and the general approach became more child-centred.

Implementation of the 'Good Start' programme

In Estonia, the 'Step by Step' (*Hea algus*) programme began in 1994 and influenced the development of curriculum at the national level and kindergartens that adopted the programme as the basis for their activities. The purpose of the programme was to support development of democracy and child-centred ideas in educational institutions of the former Soviet Union.[16] The goal was to increase family participation in child rearing and support an individualised approached to education in kindergarten, which would help children to develop democratic skills, including the ability to make choices. The theoretical foundations of the Step-by-Step programme included approaches to the development and learning of the child, the growth environment, and the need for and implementation of democratic principles in pre-school. The programme also included principles for developing a group growth environment, monitoring children's development, and assessing, personalising, and co-working with parents.[17]

While in the earlier Soviet-era programmes, a great deal of collectivist, uniform education was emphasised, implementation of the Good Start methodology was important in individualising teaching, creating a child-centred learning environment, positive communication between the teacher and the child, assessing the child's development, and working with parents. Child-centred individualisation meant that the daily plan was tailored to the needs of each child, and selected materials, teaching methods, and activities had to be appropriate for everybody. The role of the teacher was seen as comprehensive support for development of the child through individualisation and involvement of the family in assessment of the child's development and the activities of the group. An important principle the Good Start programme started to implement in Estonian kindergartens was the use of the environment as part of the learning process. A good learning environment allows the child to make choices, to realise his or her interests, and to act pro-actively. Following this principle, Estonian childcare institutions began to create activity centres in

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[15] E-S. Sarv, *Demokraatiast ja humanismist õpetajale: Eesti haridusuuendus – hariduse demokratiseerumine ja humaniseerumine* [On democracy and humanism to teacher: Estonian educational renewal – democratisation and humanisation of education], Tallinn, Riiklik Eksami-ja Kvalifikatsioonikeskus, 1997.

[16] K. Hansen, et al., *Hea Alguse lasteaedade programmem* ['Step by Step' kindergarten programme], Tallinn, Avatud Eesti Fond, 1997.

[17] Ibid.

the classrooms, which enabled the teacher to individualise activities and children to actively learn, play, make choices, and act in small groups in the classroom. The teacher played an important role in implementing the programme and was responsible for creating a suitable environment for the development of each child, which meant knowing the child's strengths, needs, and interests.

In 1994, 22 Good Start groups began operation. The first teachers' groups were trained in the USA. The aim was to design model groups for introducing Good Start methodology more widely. In 1996, a number of Estonian schools joined Good Start and introduced it into 13 first grades. In 1997, Russian-language schools were also included in the programme. By 2004, Good Start was implemented by nearly 250 kindergarten groups and 150 classrooms across Estonia. The programme was supported by the Good Start Training Centre. In addition to Good Start kindergarten teachers, many child day-care teachers from other kindergartens participated. Materials for nursery teachers were provided to conduct democratic education in kindergartens, to implement Good Start methodology programmes, and to offer recommendations for assessing the activities of teachers. Good Start programme ideas were, to a large extent, used in the national early childhood education curriculum.

International studies have shown that participation in the Step by Step programme positively impacted the emotional, social, and intellectual development of children and supported the spread of child-centred ideas among teachers.[18]

In Estonia, relatively little research has been carried out on the implementation of the Good Start programme. Studies among kindergarten teachers have shown that the implementation of Good Start supports the professional development of teachers and helps teachers better understand and analyse pedagogical processes and child development.[19] Also, Good Start teachers assess their child-centred approach more highly than do "ordinary" kindergarten teachers.[20]

Implementation of pre-school education institution curriculum, 1999–2004

The National Curriculum for Basic Schools and Upper Secondary Schools was adopted in 1996 (based on projects developed in 1987, 1989, 1994), but it took more time for preschool institutions. Only in 1996 was the Pre-School

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[18] E. M. Kazimade, et al., 'Evaluation of the Step by Step Programme in Azerbaijan,' *Educating Children for Democracy*, no. 5, 2003, pp. 25-31; M. Havlinova, et al., 'Measuring Psychosocial Outcomes in the Step by Step Programme,' *Educating Children for Democracy*, no. 6, 2004, pp. 20-25.

[19] A. Ugaste, T. Õun, 'Teachers' Experiences in Child-Centered Education in Estonia,' *Young Children*, vol. 62, no. 6, 2003, pp. 54-56.

[20] T. Õun, et al., 'Perception of Estonian Preschool Teachers About the Child-cantered Activities in Different Pedagogical Approaches,' *European Early Childhood Education Research Journal*, vol. 18, no. 3, 2010, pp. 241-256.

Curriculum Project released, with difficulty. The project was implemented and tested and feedback was received; it ultimately became the National Curriculum for Pre-school Children's Institutions in 1999.

Discussions on the development of curriculum were very intense after 1991. In 1999, the National Pre-school/Elementary Education Framework was implemented, requiring each kindergarten to draw up a curriculum. The main purpose of educational activities in kindergartens was to support children's physical, mental, and social development so that children could cope with everyday life and learning in school. These main aims were also reflected in the new edition of the curriculum.[21]

The 1999 Curriculum defined the main principles and organisation of learning activities: cooperation with parents, taking into account a child's individuality, appreciation of Estonian culture and other cultures, the importance of play, physical activity, and options/choices. The Curriculum defined fields of learning: language and speech, mathematics, art, music, and movement. The number of activities per week was also defined; for example, 3- to 5-year-old children had to have art activities 2 to 3 times a week. The duration of activities was also defined: for children under 3 – 10-15 minutes, 3-5 years old – up to 25 minutes; and for 6-7-year-old children – up to 35 minutes. It included recommended topics, descriptions of subject areas, and the basis for assessing a child's development and expected results at the age of 3, 5, and 7 years.

Similarities between the 1999 Curriculum and earlier Soviet programmes did exist: the overall goal of kindergarten was to promote the development of the child in all fields with special attention paid to strengthening health and monitoring development. Among the differences were most notably the introduction of individualisation in the curriculum, which meant that the earlier emphasis on collectivist education was replaced by support for the child's individuality, and each kindergarten could draw up its curriculum based on the nature of the kindergarten and its children. The second difference was that the 1999 Curriculum was not oriented solely for preparation for school but for broader preparation of children for life. The third difference was the approach to cooperation with parents: kindergarten was a family-supported institution, not an example of training and upbringing as in the past.

The role and tasks of pedagogical staff working in kindergartens is important for implementation of the curriculum. In the Soviet era, pedagogical staff were appointed as nursery school educators, but in the new child-centred curriculum, kindergarten staff would support the individual development of each child. The Pre-school Establishments Act stipulated that pedagogues working in childcare institutions should counsel parents on educational issues. The change in the status of kindergarten staff was apparent in the change of title from 'educator' to 'teacher' in 1999. But this did not mean that the salary

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[21] 'Alushariduse raamõppekava kinnitamine' [Approval of the framework curriculum for pre-primary education], *Riigi Teataja* [State Gazette], vol. I-80, no. 737, 1999. Available: https://www.riigiteataja. ee/akt/77809 (accessed 1 April 2020).

of a kindergarten teacher would be equal to that of schoolteachers.[22] Kindergartens were owned by municipalities and financed from local budgets; thus, the salaries of kindergarten teachers varied considerably from region to region. During the Soviet era, specialised secondary education was required to become a kindergarten teacher, but after regaining independence, qualification requirements for teachers were changed and kindergarten teachers were now required to have higher pre-school pedagogy degrees or at least specialised secondary education qualifications. Kindergarten heads and deputies needed a higher education degree.

Comparing the Estonian Pre-School/Elementary Education Framework with other European countries during the same period, the Estonian curriculum was designed for children 0-7 years old, as in Denmark, Finland, Norway, and Sweden. The curriculum was similar to that of other Nordic countries, which were also oriented towards the overall development of children by emphasising humanist, democratic values and in which teachers shared responsibility for children's development.[23] Comparison of the main objectives of pre-school curriculum in other European Union countries,[24] reveals that the goals were similar: the child's comprehensive development, autonomy, responsibility, and cooperation and dialogue with parents were prioritised.[25]

Language immersion

The aim of language immersion is equally good skills in the mother tongue, the target language, and in other languages.

The aim of the Estonian language immersion programme is acquisition of functional skills of both languages – the language of instruction and the mother tongue. The programme was implemented mostly in Russian kindergartens and schools in 2000. This meant that schools, in addition to the home, provided children with an environment and culture in their mother tongue. Language immersion pupils studied their mother tongue, literature, and culture.[26] The first language immersion groups in kindergartens for Russian-speaking children opened in 2003.

The immersion programme required increased teacher readiness to support and improve learning for non-Estonian children, including mastery of culturally sensitive teaching methods in a multicultural, multi-lingual classroom. Teachers had to improve their knowledge, skills, and experience in long-term and

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[22] 'Koolieelse lasteasutuse seadus' [Pre-school Establishments Act], *Riigi Teataja* [State Gazette], vol. I-27, no. 387, 1999. Available: https://www.riigiteataja.ee/akt/77275 (accessed 1 April 2020).

[23] M. Alvestad, I. Pramling Samuelsson, 'a Comparison of the National Preschool Curricula in Norway and Sweden,' *Early Childhood Research & Practice*, vol. 1, no. 2, 1990. Available: http://ecrp.uiuc.edu/v1n2/alvestad.html (accessed 20 March 2017).

[24] European Commission, *Key Data on Education in Europa*, Luxembourg, Eurostat, 2002.

[25] 'Koolieelse lasteasutuse riiklik õppekava' [National curriculum for preschool establishments], *Riigi Teataja* [State Gazette], vol. I-23, no. 152, 2008. Available: https://www.riigiteataja.ee/akt/13351772 (accessed 1 April 2020).

[26] *15 aastat keelekümblust* [15 Years of language immersion], SA Innove, 2014, pp. 9, 18, 21, 22.

extensive continuing education (e.g., Integrated Teaching in the Language Immersion Group; Teaching Estonian as a Secondary at pre-school childcare institutions).[27]

In the case of language immersion, the holistic principle was especially important in Estonian curricula. Holism attempts to shape the whole person through the whole curriculum. This meant that the pupil had to be prepared to deal with various learning, working, and living situations. It also meant integration of different parts of the curriculum. In a holistic curriculum, continuity, sequence, and integration are central principles.[28] Continuity means that there is vertical repetition in the curriculum: skills and concepts should be repeated and there should be opportunities for practicing them. Subsequently, the curriculum should support the development of understanding, and each subsequent experience builds on the previous, becoming broader and deeper. Integration requires a complete picture of the subject being studied.[29] The effectiveness of the achievement of the objectives of the curriculum is assessed with the increase of competence.

The Longitudinal Study 2007–2009 examined the achievements of pre-primary and third grade primary-school students who studied using early immersion methodology. Both teachers and parents assessed the achievements of children at the end of kindergarten and the third grade. The ratings differed slightly but were quite positive and showed that kindergarten language immersion groups prepared children well for school in all areas of competences. Learning in Estonian language immersion classes was also successful.[30]

Applied research and development activities of the curriculum

In 2002, under the guidance of the Estonian Ministry of Education and Research, a study was conducted to assess the implementation of the curriculum.

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[27] A. Kukk, et al., *Varane keelekümblus: õppekava eesmärkide saavutamine lapsekeskse lähenemise aspektist* [Early language immersion: achievement the goals of the curriculum in terms of a child-centered approach], Tallinn, Haridus- jA Teadusministeerium & Tallinna Ülikool, 2012, pp. 10, 42.

[28] T. Kuusk, 'Lõiming. Lõimingu võimalusi põhikooli õppekavas' [Integration. The possibilities of the integration in the basic school curriculum], 2010, p. 6. Available: http://www.ut.ee/curriculum/orb.aw/class=file/action=preview/id=724571/L%F5 imingukogumik.pdf. (accessed 1 March 2010); A. Kukk, 'Õppekava eesmärkide saavutamine üleminekul lasteasutusest kooli ning I kooliastmes õpetajate hinnanguil' [Achievement of the objectives of the curriculum in the transition from pre-school institution to school as assessed by the teachers at I school-level], PhD diss., Tallinn University, 2010; T. Õun, 'Koolieelse lasteasutuse kvaliteet lapsekeskse kasvatuse aspektist' [The quality of preschool from the aspect of child-centered education], PhD diss., Tallinn University, 2011.

[29] A. Kukk, et al., *Varane keelekümblus: õppekava eesmärkide saavutamine lapsekeskse lähenemise aspektist* [Early language immersion: achievement the goals of the curriculum in terms of a child-centered approach], Tallinn, Haridus- ja Teadusministeerium & Tallinna Ülikool, 2012, pp. 16-17.

[30] Ibid., pp. 8, 144, 147.

The aim was to provide feedback from leaders and teachers of kindergartens about the possibilities and problems of implementing the national curriculum.[31] The study showed that teachers were pleased with the opportunity to create a curriculum for their kindergarten classes. Additionally, content of the learning-areas/subject-areas in the curriculum provided teachers with the opportunity to choose topics and activities, and the overall structure of the curriculum was appreciated.

However, leaders and teachers raised a number of issues in implementing the pre-school education curriculum. First, modernisation of the goals and principles of learning was necessary. The 1999 Framework Curriculum outlined the goals in general terms. Children's individuality and specificity were emphasised, but the objectives were formulated from the viewpoint of the teacher: the teacher teaches, explains, develops, etc. Considering the principles of a child-centred approach, teachers found that the goals and principles of the curriculum needed to be modernised.

The curriculum provided the number of educational activities per week based on the age of the children. Most pedagogues found that this did not support implementation of integrated teaching and various child-centred practices. This was particularly emphasised by supporters of alternative pedagogical trends and the Step by Step programme. Teachers pointed out that the importance of play was not highlighted enough in the curriculum, adding that it was necessary to emphasise the role of play in education and activities and highlight the children's play skills separately. The curriculum outlined the principles for teaching but lacked a broader learning concept – how to understand the learning processes of a pre-school child and which learning approaches/concepts the teacher would apply. The leaders and teachers who participated in the study stated that the wording of the curriculum did not support implementation of a child-centred learning approach. Teachers also stated that the curriculum needed be more open to support the development of special needs children with cooperation from parents, organisation of teaching Estonian language as a second language, and issues of ethical, health, and emotional education. The results of children's development at the age of 3, 5, and 7 years were presented in the framework. Teachers found that it would be necessary to specify the descriptions of these results at each age stage by areas. It was also pointed out that the developmental results for the kindergarten curriculum did not adhere to school curriculum; therefore, when updating the curriculum, the outcomes for children aged 6-7 should be coordinated with the basic school curriculum.[32]

Based on the research, the representatives from of the Ministry of Education and Research, including teachers, leaders, representatives of professional associations, parents, and university specialists created working groups in

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[31] J. Treier, 'Alushariduse õppekava rakendumine' [Implementation of the Early Childhood Curriculum], Thesis, University of Tartu, 2004.
[32] Ibid.

2004. The aim of these groups was to supplement and update the Pre-school Framework Curriculum based on previous research and international pre-school education documents. The updated curriculum took effect in 2008.

Conclusion

After the restoration of independence of Estonia in 1991, democratic principles were revalued in the field of education. Openness to educational renewal was present in Estonian society in the early 1990s. Educationalists and practitioners were interested in alternative pedagogical trends, such as Waldorf and Montessori pedagogy. The organisation of pre-school institutions was based on children's development, unlike during the Soviet period when educational institutions were characterised predominantly by teacher-led and controlled learning processes. Emphasis was placed on child-friendliness instead of the authoritarian style, which ignored the needs and interests of the child.[33] Yet, principles of child-centred approach were not unknown in Estonia in the earlier periods. In the 1930s under the leadership of Johannes Käis, many Estonian schools implemented integrated teaching and individualisation, and after reestablishment of independence, many kindergartens began to redefine Käis' principles.

The main topics of discussion on the development of the pre-school education programme since 1991 have been related to the consideration and assessment of a child's development, integration of teaching, and flexibility of the curriculum. The implementation of the Good Start programme in Estonian kindergartens since 1994 has made a significant impact on the development of the national curriculum and the activities of educational and educational childcare institutions: more attention is paid to the child's individuality, group work, design of child-centred group space, provision of options, and implementation of democratic teaching methods.

In 1999, the Frame Curriculum for Pre-school Education (as in the curricula of the ESSR) promoted the development of the child and paid attention to strengthening the child's health. The curriculum emphasised the child's individuality and integration of learning activities more than before. It also created the opportunity for childcare institutions to draw up their own curricula, which supported the specificity of each individual childcare institution and inclusion of pedagogical staff in the development of the curriculum. Teaching and upbringing was not narrowly oriented to academic knowledge and preparation for school, but to a broader scope of daily life.

Research on the implementation of curriculum completed in 2002 revealed that, according to the teachers, there were no clear learning and teaching concepts defined in the pre-school education curriculum. Also, play was not

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[33] E. S. Sarv, 'Political and Social Transformations – Analysis in the Estonian Context,' in H. Niemi (ed.), *Moving Horizons in Education. International Transformations and Challenges of Democracy*, Helsinki, University of Helsinki, 1999, pp. 39-67.

sufficiently emphasised and planning of the learning process was subject-oriented and hindered the use of integrated teaching methods. Studies indicate that a rigid programming system limited teacher activities and application of various methodologies. Due to the results of the research, curriculum development was launched, which resulted in completion of the curriculum for Estonian pre-school institutions in 2008.

To conclude, the development of a curriculum for pre-school childcare institutions in Estonia in the years 1990–2004 was a democratic process, supported by research, group leaders, and teachers. The Primary Education Framework Programme, implemented in 1999, supported democratisation of education and implementation of a child-centred approach in pre-school childcare institutions in Estonia.

Changes in the Teaching of Native Literature: the Case of Latvia

Elita Stikute

Abstract. The purpose of this study was to discover what challenges and innovations were significant in the literature curriculum after 1990. The article describes changes and updates in the methodology of literature teaching. The teaching of Latvian literature underwent major changes during the transition from an authoritarian regime to a democratic society: it was necessary to revise an old, obsessively socialised, Soviet-ideologised curriculum and develop a new curriculum focused on literature as an art of words, with special emphasis on Latvian identity. Literature and Latvian language had to be taught by recognising them as a national value, expression, and stimulus of a nation's intellectual life, guardian of historical experience, and an artistic and emotionally imaginative description of a nation's destiny. In order to actualise the new curriculum, standards in literature for primary and secondary school and curriculum exemplars were adapted and various new, modern, and methodologically diverse teaching aids and resources were developed. The literature teacher received a wide range of choices; the teacher was able to design his or her own curriculum, appropriate to the age and interests of students. The educational principles defined in the curriculum of primary and secondary education (self-expression and creativity, collaboration, and practical activities) shifted the emphasis from teacher-knowledge-provider to teacher-assistant, companion, and counselor in the teaching/learning process.

Keywords: literature as an art of words, teaching/learning standards, curriculum, teaching aids, methodology

Introduction

Literature as a subject of study has great importance in voicing universal intellectual and national values, value orientation, ethical and aesthetic up-bringing, development of the emotional and mental world of the personality, and emotionally evaluating activity and attitude, self-realisation, and co-creation. After regaining independence, these aspects became especially important within the literature learning process in Latvia. I review changes in the educational system and organisation of the literature teaching/learning process and activities of Latvian language and literature teachers after 1990, as well as demonstrate the transition to new educational standards and provide curriculum development examples. The purpose of this study is to discover what challenges and innovations were significant in the literature curriculum after 1990. The article also describes changes and updates in the methodology of literature teaching.

Changes in the education system and organisation of the learning process after 1990

The Latvian educational system underwent significant transformation during the 1990s and at the beginning of the 21st century. It affected every school, student, and teacher. One of the main innovations of the educational system was the improvement of quality of education of native language and literature teaching: it strove to seek answers to the question – what kind of education did students really need to be best prepared for the rapidly changing and complicated world of the future? Students had to learn to find reference points in the world of values (as well as lack of values), take risks, make their own decisions, prove and stand by what they believed in, defend their viewpoint, and communicate in a world of diversity. The European Union's (EU) *White Paper on education and training* emphasises that the purpose of education is to prepare Europeans for gradual transition into a society in which everyone continues to study and teach others all their lives and, thus, be part of the learning society.[1] In his report 'Education for the 21st century', Jacques Delors names the ability to teach 'how to learn' as essential for being able to fit into a rapidly changing world. In the next, 21st century, problems included in the agenda will require revision of educational goals and reevaluation of human expectations regarding study results. Broad, comprehensive understanding about learning can allow every person to discover, reveal, and enrich his/her creative potential, opening the treasures hidden in every one of us. If up to now education was perceived as the process that allowed us to reach certain goals (skills, abilities, or economic potential), then currently the opinion dominates emphasising personality development, in short, learning to be.[2] Within this context, it is very important to offer education that can provide the possibility to acquire, select, arrange, manage and use information; the four most important pillars of future education are learning to know, learning to do, learning to be, and learning to live together.[3]

While orienting towards a return to Europe and joining the EU, Latvia also had to solve issues about its future society and its education. Achievements were described in the State Primary Education Standard goals and tasks in which the dominant role in the evaluation of learning efficiency was taken by

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[1] Eiropas Komisija [European Commission], *Mācīšana un mācīšanās – ceļš uz izglītotu sabiedrību* [Teaching and learning – towards a learning society], Riga, Akadēmisko programmu aģentūra, 1998, p. 45.

[2] Rīgas Pedagoģijas un izglītības vadības augstskola [Riga Teacher Training and Educational Management Academy], *Nākotnes izglītības meti UNESCO starptautiskās komisijas 'Izglītība divdesmit pirmajam gadsimtam' ziņojumā* [Future education perspectives in the UNESCO International committee report 'Education for the 21st century'], Riga, Vārti, 1998, p. 32.

[3] Ibid., p. 19.

the ability to cooperate, use acquired knowledge in new situations, and plan and implement work[4].

Rapid increase of information and general humanisation of education took place during this period. The White Paper set the precondition for everyone to learn to think more systematically and determine his/her place in society as a user, citizen, individual, and member of the community.[5] Comprehensive knowledge allows people to find their path in the acquisition of information, as well as critically evaluate information obtained from various sources.

New requirements for the teacher

Education policy decision-makers, teaching staff, and all educators were increasingly concerned with questions: What should we teach in school? What education should we offer that is suitable for the modern world? In addition, there were issues surrounding economics, cultural and technological union and diversity, and the transition to an information society. While acknowledging new accents in education, it was important to carefully evaluate past achievements of pedagogical practice and theory and determine what to maintain and develop and what to get rid of.

Society was increasingly debating about the type of knowledge needed for practical life, complaining that schools still paid a lot of attention to factual knowledge and its reproduction and that learning processes did not aid in creating a systemic worldview. Connections, links, and contexts between various subjects were seldom made. Teachers taught each subject separately without mutual consultations, ignoring the common and significant. Each teacher imposed maximum requirements and anticipated the same amount of feedback from the student, thus providing and requesting masses of information not needed for life outside the school walls and excessively burdening students. As a result, contradictions arose: education legislation documents – Latvian education concept[6] and State primary education standard[7] – required young people to be able to solve complex problems, evaluate various circumstances,

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[4] Latvijas Republikas Izglītības un zinātnes ministrija, Izglītības satura un eksaminācijas centrs [Ministry of Education and Science of the Republic of Latvia, Center for Curriculum and Examination], *Valsts pamatizglītības standarts* [State primary education standards], Lielvārde, Lielvārds, 1998, p. 7.

[5] Eiropas Komisija [European Commission], *Mācīšana un mācīšanās – ceļš uz izglītotu sabiedrību* [Teaching and learning – towards a learning society], Riga, Akadēmisko programmu aģentūra, 1998, p. 23.

[6] Latvijas Republikas Izglītības un zinātnes ministrija [Ministry of Education and Science of the Republic of Latvia], *Latvijas Izglītības koncepcija* [Latvian Education concept], Riga, 1997, p. 32.

[7] Latvijas Republikas Izglītības un zinātnes ministrija, Izglītības satura un eksaminācijas centrs [Ministry of Education and Science of the Republic of Latvia, Center for Curriculum and Examination], *Valsts pamatizglītības standarts* [State primary education standard], Lielvārde, Lielvārds, 1998, p. 32.

consider opinions, and make decisions, but the learning process did not promote these skills.

The necessity arose to develop thinking processes through educational content and methods – fostering, promoting, and creating a suitable study environment. Several modern humanist pedagogical practices were introduced through various projects such as 'Reading and writing for the development of critical thinking'[8] that altered existing stereotypes, especially emphasising the cognitive process and development of action.

The role of the teacher in the learning process changed gradually from a carrier and provider of knowledge to a consultant, assistant, ally, and cooperation partner. Student activities were the key to the learning process, but the teacher helped obtain individually significant academic achievements. It was important for every teacher to understand the need for change, be able to change with the times and adopt associated requirements, and work with new methods based on cooperation with students, creating comprehensively developed and original individuality as noted in the UNESCO report *Education for the 21st century*.[9] In turn, the Latvian Education concept anticipated creation of favorable circumstances for development of the individual according to his/her skills and interests.[10] To promote implementation of this goal, teachers had to review priorities in the learning process and alter organisation of work and learning tools to align the educational process with those requirements.

Every innovation enters society gradually and is not immediately accepted. There were teachers who were open to changes, accepted them, and introduced them in their pedagogical activities; they were not afraid of experimenting and were not perplexed by difficulties if something did not work out as planned. Teachers critically reviewed their teaching styles, wanted to change and upgrade their skills, and were motivated to change study methods to make the learning process more enjoyable. But some teachers still worked with old methods, afraid of the new and unknown because the old work style was tested, familiar, comfortable, and safe.

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[8] Izglītības attīstības centrs [Education Development Center], *Kritiskās domāšanas attīstīšanas pieejas izmantošana izglītības sistēmā – ietekme un efektivitāte Latvijā. Pētījuma rezultāti un ieteikumi* [Application of the critical thinking development approach in the educational system – influence and efficiency in Latvia. Study results and recommendations], Riga, Izglītības attīstības centrs, 2008. Available: http://www.iac.edu.lv/assets/Publications/Kritiska-domasana-web.pdf (accessed 11 July 2017).

[9] Rīgas Pedagoģijas un izglītības vadības augstskola [Riga Teacher Training and Educational Management Academy], *Nākotnes izglītības meti UNESCO starptautiskās komisijas 'Izglītība divdesmit pirmajam gadsimtam' ziņojumā* [Future education perspectives in the UNESCO International committee report 'Education for the 21st century'], Riga, Vārti, 1998, p. 32.

[10] Latvijas Republikas Izglītības un zinātnes ministrija [Ministry of Education and Science of the Republic of Latvia], *Latvijas Izglītības koncepcija* [Latvian Education concept], Riga, 1997, p. 4.

Latvian literature curriculum development: classic values and innovations

When Latvia regained independence, the ideology-laden curriculum of the Soviet period had to be reviewed. Latvian literature as a subject was a convenient tool in the hands of the Soviet ruling in order with which to teach young people "proletarian internationalism" and "socialistic patriotism principles" – endless loyalty towards communism ideals and love towards the socialistic Homeland and other Soviet-friendly countries. The task of the student was to make conclusions about advantages of Soviet life and feel pride and joy in the Soviet Homeland (as opposed to the capitalist world) and better understand the benefits of the Soviet ruling order and feel the joy of their life, eradicate past contradictions, and raise New Soviet People who were ready to work and fight for their Homeland.[11]

The curriculum in Soviet schools included only the works of authors expressing ideas consistent with Soviet ideology. However, in the late 1980s, the situation changed: under Gorbachev's perestroika, literature curricula began to include biographies and work of Latvian writers who were banned during the Soviet period, such as the patriotic work of Jānis Jaunsudrabiņš (1877–1962) *Piemini Latviju!* [Remember Latvia], a poem acclaiming the Latvian Riflemen by Aleksandrs Čaks (1901–1950) *Mūžības skartie* [Touched by Eternity], Aleksandrs Grīns (1895–1941) World War I novel *Dvēseļu putenis* [Blizzard of Souls],[12] a Latvian perspective of country life in Edvarts Virza's (1883–1940) *Straumēni*, and works by other writers who went into exile to the West after World War II.[13]

Up to 1992, literature curricula were determined by the Soviet Latvian People's Education Ministry under the supervision of Ērika Zimule, a Latvian Language and History Department methodologist at the Scientific Research Institute of Pedagogy. Specifics of literature as a subject were indicated in the curricula. Literature was considered a form of art and obtainable knowledge about literature was: literature history, theory, criticism, and the special significance of literature in development of the individual, teaching of general humane ethical principles, development of perception and understanding of art, and formation of the culture of feelings. Curricula issued during 1990s were created combining folklore, Latvian and foreign classic literature, and works of contemporary writers. From 5th to 8th grade, history was accentuated (literature was studied in historical sequence); in 9th grade, the principles of literature forms and genres – lyrical poetry, dramaturgy and lyrico-epics were taught; and from 10th to 12th grade – historical or chronological literature development

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[11] E. Stikute, *Latviešu literatūras didaktika* [Latvian literature didactics], Riga, RaKa, 2011, p. 119.

[12] Latvijas PSR Tautas izglītības ministrija [Ministry of Public Education of the Latvia SSR], *Latviešu literatūra. Eksperimentāla programma vispārizglītojošo skolu 5.–12. klasei* [Latvian literature. Experimental programme for general education schools from 5th to 12th grade], Rīga, Latvijas PSR Tautas izglītības ministrija, 1989, p. 9.

[13] Ibid., p. 14.

principles looked at both Latvian and foreign literature. Curricula indicate that teachers were given a choice to select specific authors and recommend literature for further reading. The approximate number of lessons needed to master a particular topic was indicated but could be changed by the teacher. Curriculum included studying literature on several levels: 1) analyze and learn; 2) analyze and learn by choice and abilities; 3) discover on the informative level. Curricula include literature theory because without the knowledge of theory it was not possible to fully understand the literary work: the level of ideas and recognition in elementary school and the level of concepts in secondary school. After the outline of content for secondary schools, an orienteering level of knowledge and skills was provided, including the ability to do, know, and recognise. Finally, curriculum planned, for each grade, the number of lessons for reading contemporary literature (5–6 lessons), independent work at the library or literary excursions (around 6 hours), and about 10 hours devoted to written works from the total amount.[14]

During the 1990s, Latvia began the transition to new educational documents. For each subject, this meant a change from one single mandatory curriculum and a single textbook that complied with subject standards and a mandatory level of knowledge and skills to a system that allowed teachers the freedom to choose from various curricula or develop his/her own curriculum as well as freely select textbooks and other learning aids. In 1992/1993, the primary education standard[15] was adopted and the secondary education standard in 1993/1994. In 1998, the State primary education standard was re-issued, but plans to complete development of the specialised standard in all subjects was projected for 2004.

During the transition period, the introduction of new standards for Latvian language and literature were published in small brochures by the Ministry of Education.[16] They indicated the aim and tasks: develop understanding of fiction as an art form and the value of literature through teaching Latvian and foreign folklore, literature classics and contemporary works; create understanding about general humane, ethical and aesthetic values, traditional lifestyle and foster these values in perception and actions; teach national cultural perception

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[14] Latvijas Republikas Tautas izglītības ministrija [Ministry of Education and Science of the Republic of Latvia], *Literatūras programma 5.–12. klasei* [Literature curriculum from 5th to 12th grade], Rīga, Zvaigzne, 1990; Latvijas Republikas Tautas izglītības ministrija [Ministry of Education and Science of the Republic of Latvia], *Literatūras programma 5.-12. klasei* [Literature curriculum from 5th to 12th grade], Rīga, Zvaigzne, 1991.

[15] Officially approved and publicly available document that determines the optimum level of requirements about the processes and results to be achieved, anticipating definite necessary and sufficient qualitative and quantitative results indicators. See A. Blinkena (ed.), *Pedagoģijas terminu skaidrojošā vārdnīca* [Interpretative dictionary of pedagogy terms], Riga, Zvaigzne ABC, 2000, p. 163.

[16] Latvijas Republikas izglītības ministrija [Ministry of Education of the Republic of Latvia], *Vidējās izglītības standarti latviešu valodā un literatūrā* [Secondary education standards in the Latvian language and literature], Rīga, Latvijas Republikas izglītības ministrija, 1993, pp. 9-16.

and Latvian identity; promote the willingness to read and ability to experience and evaluate literary works; and create perception about the forms and genres of fiction and artistic expression possibilities. Standards included authors and their works that students should master during primary school, as well as forms of tests.[17]

The chronological (historical) principle was applied to the development of the secondary education standard in literature, emphasising literature as the artistic education of students while combining an introduction to the values of the world of art through mastery of knowledge and skills.[18] Standards also indicated global historical eras and those of Latvian literature, indicating the most notable writers and poets of each era (mandatory minimum). As teachers created their curricula, they could choose to include personalities and literary works of other writers in addition to officially mandated authors.

Upon completion of secondary school, pupils had to pass a written exam that included an essay about a literary work, or the literary process of a writer or problematic or social processes featured in a work, as well as an oral exam in literature (according to Ministry of Education guidelines[19]). Pupils were required to know the content of main literary works and how to analyze the most important problems, and characters, including literary specifics. Analysis and assumptions had to be justified with facts and quotes from literature. The narrative had to be planned, logically coherent, expressed in smooth, correct language, and be desirably creative.[20] Essays were corrected and oral exams evaluated during this period by each school's Methodological Committee of Latvian Language and Literature.[21]

During the early 1990s, learning specific subjects on an advanced level was introduced.[22] Students could study advanced Latvian literature; the programme consisted of a basic course and an extended, in-depth version. It differed from

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[17] Latvijas Republikas izglītības ministrija [Ministry of Education of the Republic of Latvia], *Pamatizglītības standarti latviešu valodā un literatūrā (projekts)* [Primary education standards in the Latvian language and literature (draft)], Rīga, Latvijas Republikas izglītības ministrija, 1992, pp. 8-10.

[18] Latvijas Republikas izglītības ministrija [Ministry of Education of the Republic of Latvia], *Vidējās izglītības standarti latviešu valodā un literatūrā* [Secondary education standards in the Latvian language and literature], Rīga, Latvijas Republikas izglītības ministrija, 1993, p. 9.

[19] *Latviešu literatūras eksāmena biļetes. Vidusskolas izlaiduma eksāmena biļetes 1994./95. mācību gadam* [Latvian literature exam sheets. Secondary school graduation exam sheets for the 1994/95 study year], Rīga, Mācību grāmata, 1995, pp. 26-29.

[20] *Vidusskolas izlaiduma eksāmena biļetes 1994./95. mācību gadam* [Secondary school graduation exam sheets for the 1994/95 study year], Rīga, Mācību grāmata, 1995, p. 6.

[21] Groups of authorised methodology specialists that discussed and solved various methodology problems, developed subject learning methodology recommendations, and helped teachers in case of methodology issues. See A. Blinkena (ed.), *Pedagoģijas terminu skaidrojošā vārdnīca* [Interpretative dictionary of pedagogy terms], Rīga, Zvaigzne ABC, 2000, p. 102.

[22] Subject in compliance with the main direction of the secondary education establishment offered in frame of in-depth learning of the educational programme. See A. Blinkena (ed.), *Pedagoģijas terminu skaidrojošā vārdnīca* [Interpretative dictionary of pedagogy terms], Rīga, Zvaigzne ABC, 2000, p. 139.

the basic course in that six instead of four Latvian literature classes were planned per week. Thus, literature development processes were mastered in detail. There was one literature teacher for the class majoring in literature and another for the basic course. In the advanced oral exam, basic course tests were used by adding no more than one to two questions developed by the teacher based on the content of the advanced course or by replacing existing questions. Gradually, the guidelines of the advanced course were developed, defining the aims, content structure, examination forms, and methodology.[23] Advanced course guidelines were introduced in the 1997/98 academic year, but the requirements only came into force in 1999/2000. Various advanced literature programmes for secondary schools were developed on the basis of these guidelines, such as curricula developed by Riga French Lyceum teachers Anita Vanaga and Gita Blaua;[24] they differed with the fact that curriculum content for the 10th grade included Latvian literature development during the 1990s, with the justification that it provided insight into literary works that were closer to the thinking process of young people and reveal interests appropriate to their age, psychological perception, and experiences. They also indicate that "all works and authors included in the programme were selected by using knowledge and skills acquired during primary school so that one can create the necessity to understand literary works more deeply, bringing closer the life experience of the student with the writer's viewpoint about various phenomenon."[25]

Writers were initiators of this new literature standard project. Teachers, in cooperation with specialists from the Union of Writers, developed the basic education standard project. Also, renowned poets, literary researchers, critics, and translators took part in selection of educational content, highlighting the artistic qualities of literary works and their suitability to the age group of students.[26] Before the basic education standard in literature was issued, Latvian language and literature specialists at the General Education Department at the Ministry of Education and Science (MoES) carefully assessed the latest projects, comparing them with existing documents and seriously considering the new content and actively discussing and negotiating: "Maybe it is still better to express one's attitude during the document development phase while it can be still corrected? Still, I am forced to remind you that people may have differing opinions; therefore, it is impossible to implement all the recommendations. … It seems we have to learn democracy together with our students – both expressing

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[23] I. Spolīte (ed.), *Literatūra. Profilkursa vadlīnijas. Projekts* [Literature. Advanced course guidelines. Draft], Rīga, Latvijas Republikas Izglītības un zinātnes ministrijas Izglītības satura eksaminācijas centrs, 1996, p. 16.

[24] G. Blaua, A. Vanaga, *Literatūras programma vidusskolai. Profilkurss. Skolotāja grāmata* [Literature programme for the secondary school. Advanced course. Teacher's book], Rīga, Zvaigzne ABC, 1999, p. 24.

[25] Ibid., p. 2.

[26] 'Sākumizglītības vadlīnijas latviešu valodā' [Guidelines for primary education in Latvian], *Izglītība un Kultūra, pielikums 'Vispārējā izglītība'* [Education and Culture, annex General education], 29 September 1994, p. 10.

our opinion, learning to listen to others, and accepting their viewpoint, even if my opinion is not always the one that wins during this battle of opinions."[27]

In 2002, National Centre for Education (NCE) specialists issued the result of the work of MoES and NCE specialists, university teaching staff, and teachers: the material to be discussed was the basic education standard project in literature (approved by NCE on 15 November 2001), a document determining subject aims and tasks, contents of the mandatory subject, and requirements for the mastering of contents and evaluation forms and procedures.[28] Contrary to the standards issued in 1992, literature was added to the field of arts. The standard project was based on humanitarian pedagogy ideas about individuality as a value, thus emphasising the guiding of individuals towards values during the study process and cooperation processes between teachers and students, as well as joint responsibility between students and teacher for results. It should be noted that for the first time, this aspect was mentioned in legislative documents for literature as a subject. It should be recognised that during literature lessons, not only the activity of the mind, understanding, and thinking processes were emphasised but also "visual perception, emotions, feelings, and self-expression in this versatile, artistic form, thus ensuring development of the harmonious individual within an ever-changing modern world, as well as mastering the specific knowledge and skills of the subject."[29]

The standards project determined a specific succession of knowledge, skills, and attitudes and a planned structure in the curriculum of local and foreign folklore, mythology, and literature. Literature learning included the following experiences: emotional, creative activity, evaluation, and cultural heritage mastery. The requirements regarding mandatory levels of knowledge upon completion of the 3rd, 6th and 9th grades provided detailed outcomes in relation to each content component.

One of the innovations of the general education curriculum reform was development of a new evaluation system of the academic achievements of students. As mentioned before, changes in study content also changed the role of the teacher (how s/he teaches) and the student (how s/he learns). Therefore, the evaluation process of the student's academic achievements was transformed. Transition to a 10-point evaluation scale took place, as well as "pass" and "fail." Evaluation became more versatile, purposeful, and student-friendly. If previously the teacher was the main source of knowledge and pupil answers were evaluated according to "How many facts that I taught you have learned?", then now the task of teacher was to teach students to study and develop their skills according to the content of the subject. Students became co-responsible

[27] 'Sākumizglītības vadlīnijas latviešu valodā' [Guidelines for primary education in Latvian], *Izglītība un Kultūra, pielikums 'Vispārējā izglītība'* [Education and Culture, annex General education], 29 September 1994, p. 3.

[28] *Literatūra. Pamatizglītības standarta projekts. Materiāli apspriešanai* [Literature. Project of primary education standard. Materials for discussion], Rīga, Latvijas Republikas Izglītības un zinātnes ministrija, Izglītības satura un eksaminācijas centrs, 2002, pp. 5-12.

[29] Ibid., p. 6.

and also partners of the teacher during the study process.[30] This aspect was depicted in the draft of the elementary education standard in literature where, for the first time, explicit academic achievement evaluation forms and procedures were provided. Contrary to previous evaluation procedures in which the teacher was the main evaluator, this standard project emphasised mutual evaluation of students, self-evaluation, and various evaluation forms in literature, apart from evaluation by the teacher, as well as the state examination upon completion of 9th grade.

The next step was development of the literature programme template, planned by NCE. It formulated the purposes and tasks of learning and the study content, as well as the logical succession of learning and planning, indications about the learning tools to be used, optimum methodological provisions, and evaluation forms, methods, criteria, and procedures to determine the students' academic achievements. Curricula templates were developed as a recommendation; they could vary, meaning that teaching could take place according to the didactic target, and specifics of the student age group and perception abilities could change the sequence of literary works by replacing the authors and works indicated in the programme with something else. NCE planned to develop this literature learning programme template but not attach it to a specific learning tool. The teacher could also develop the curriculum of her/his subject in line with the standard planning structure regarding local and foreign folklore, mythology, and literature; determine the proportion of prose, poetry, and drama; choose literary works in line with the interests and needs of students; and develop versatile study methods and work organisation forms.[31] It should be added that over time, there were various searches, experiments, and attempts to develop literature curricula. For example, the literature curricula for 5th to 9th grades, developed in 1993, were adopted by the Ministry of Education and were based on new knowledge about a specific type, genre, figurative approach, measure, etc. of the work of fiction or in-depth and expanded previously-acquired knowledge.[32]

On the background of other curricula, especially emphasising the interdependency of literature with other art forms involving artistic expression (periodicals, television, cinema, theatre), indication of mastery of literary works could take place not only in the classroom but also in the library, museum, writer's commemoration place, and during literary excursions. The fact that curricula took into consideration local regional literature, anniversaries of writers, and other literary festivals, thus expanding the perspective of students

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[30] *Vērtēšanas mērķi. Atbalsta materiāli skolotājiem* [Evaluation targets. Support materials for teachers]*,* Rīga, Latvijas Republikas Izglītības un zinātnes ministrija, Izglītības satura un eksaminācijas centrs, 2004, p. 4.

[31] *Literatūra. Pamatizglītības standarta projekts. Materiāli apspriešanai* [Literature. Project of primary education standard. Materials for discussion], Rīga, Latvijas Republikas Izglītības un zinātnes ministrija, Izglītības satura un eksaminācijas centrs, 2002, p. 12.

[32] S. Urževica, *Literatūras programma 5.–9. klasei* [Literature programme for 5th to 9th grade], Rīga, 1993, p. 47.

and connection of the curricula acquired at school with the local community, is of great value.

Conclusion

Changes in literature learning from 1990 to 2004 indicate that after regaining independence, significant changes took place in the teaching/learning of literature: old curricula were revised, reviewed and altered for all age groups; literature learning standards, curricula templates, cooperation forms and methods for students and teachers, and academic achievement evaluation principles were developed. This period brought forward special meaning of literature as a subject of art for the development of harmonious individuals by accentuating aesthetic enjoyment and emotionally evaluating attitudes of literature, the meaning of co-creation and self-actualisation, and inclusion of the humanist, national, and local component into the content.

The Challenges of Teaching History in a Democracy: the Case of Latvia

Aija Abens

Abstract. The occupation of Latvia by the Soviet Union after World War II resulted in the creation of curriculum and methodology that required embracing of a Russo-centric, totalitarian communist system that was formalist in nature and denigrated previously accepted national values and ideals. In 1991, after Latvia regained its independence, democratic education once again came to the forefront, grounded theoretically in the significance and development of democratic and civic and national educational ideals. However, embracing democratic teaching principles that encourage critical thinking and alternative theoretical approaches has been difficult for a cohort of educators and administrators trained to be transmitters of information, rather than facilitators of participatory educational practices. The practice of history teaching, as a transmitter of social integration and builder of a civic-minded society, also came under scrutiny. My theoretical basis reflects the interconnectedness of sociology, politics, and pedagogy that acknowledge the ties between history teaching, democratic education and identity, their effects on individual and societal development of historic understanding, and the resulting development and assessment of society by the individual, society, and the state. Sources include not only literature and primary sources, but also survey results and reflections. Results show that current history education practice includes democratic principles; however, the rigid nature of indoctrination characteristic of totalitarian regimes has had a lasting effect on methodology, resulting in continuation of many of the formalist practices and values internalised during Soviet occupation.

Keywords: democratic teaching, post-Soviet Latvia, history teaching

Introduction

Key elements for education for democracy include promotion of moral values generally accepted by a democratic society, acknowledgment of role models exhibiting good character within the school and general community, guided peer discussion of moral issues and participation in school and classroom governance, learning about character through curriculum, inclusion of the family, particularly parents in moral education, and finally, practical experience in democratic behavior. Nevertheless, there is some disagreement about what encompasses the basis of democratic education, particularly in the realm of instilling desirable, i.e. moral habits – for some it is reduced to a form of attitude change, but for others it means a more liberal cognitive orientation.[1]

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[1] M. W. Berkowitz, 'Civics and Moral Education', in B. Moon, M. Ben-Peretz (eds.), *Routledge International Companion to Education*, London, Routledge, 2000, p. 897.

This paper will address the main issues associated with the effects on the teaching of history, resulting from a drastic paradigm shift – the change from a Soviet centralised authoritarian education system to an independent Latvian liberal democratic one. Has a shift in attitude occurred as a result, or is a more liberal cognitive orientation necessary to affect true change? What are the main hurdles in the way of achieving democratic history teaching practices in Latvia?

The theoretical basis of my research is based on the significance of history teaching in the development of democratic and civic educational ideals and modern critical theorists' work on power, language, memory, and other related issues, as well as how critical pedagogy in history teaching relates to the individual, society, and the nation. This paper addresses some of the difficulties associated with teaching history after a radical paradigm shift.

Under totalitarian regimes, there is no leeway for free and open examination and discussion of alternative forms of evidence that may contradict state ideology.[2] Wild notes that the young and their physical weakness and mental confusion are manipulated through fear and force, and in higher levels of education, authoritarianism encourages imitation and discourages questions and discussion. This method often succeeds in the intact transmission from one generation to the next of a rigid social order, wiping out spontaneity and originality and offering little chance of correcting previous mistakes.[3] Fromm notes that aspects of authoritarian ethics are apparent in the unreflective value judgments made by the average adult.[4] Ironically, this must inevitably lead to inherent distrust and skepticism of any concepts or thought not sanctioned by the ruling order, even though the sanctioned is itself looked upon as lies.

Modern pluralistic democracies tend to be aware of using various teaching methods, including a variety of sources, but can still come under political ideological pressure. Pluralistic democracies suppose to educate for democracy, which includes participation in the democratic process, and also involves general moral education[5] as part of an un-admitted socio-centric tendency to see things through a middle-class lens.[6] Dewey argues that experience lies at the core of education and that educating for democracy requires participation in the democratic process.[7] Friere takes this further by stressing the revolutionary

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[2] T. Taylor, 'The Past, Present and Future of History Teaching in Schools,' in B. Moon, M. Ben-Peretz (eds.), *Routledge International Companion to Education*, London, Routledge, 2000, pp. 850-852.

[3] J. Wild, 'Education and Human Society: A Realistic View,' in N. B. Henry (ed.), *Modern Philosophies and Education*, Chicago, University of Chicago Press, 1955, pp. 17-56. Available: http://www.questia. com/PM.qst?a=o&d=11822419 (accessed 6 May 2007).

[4] E. Fromm, *Man for Himself: an Inquiry into the Psychology of Ethics*, London, Routledge, 1947/1999, pp. 9-10.

[5] M. W. Berkowitz, 'Civics and Moral Education,' in B. Moon, M. Ben-Peretz (eds.), *Routledge International Companion to Education*, London, Routledge, 2000, pp. 897-908.

[6] R. Preiswerk, D. Perrot, *Ethnocentrism and History: Africa, Asia and Indian America in Western Textbooks*, New York, NOK Publishers International, 1978, p. 27.

[7] J. Dewey, *Democracy and Education*, New York, McMillan, 1916.

nature of truly democratic education and the need for awareness of civic and political responsibilities and the acquisition of an analytical attitude towards authority.[8]

My sources include articles from the pedagogical press, government websites, conference proceedings, and published methodological materials as well as published survey results and interviews.

Teaching under renewed independence

Liberalism and decentralisation (1991–1995). With the collapse of the Soviet Union and the regaining of independence in 1991, Latvia was once again faced with the daunting task of drastically restructuring its education. The rejection of the anti-humanist nature of Marxist/Leninist doctrine of a centralised authoritarian Soviet system was clear, but its replacement was not. Educationalists were required to "retool" an educational system that was highly centralised, politicised in its Russo-centric communist rhetoric, and formalist in its didactic approach. In addition to changes in political rhetoric and teaching methods, the education system faced challenges with regard to creation of a curriculum that reflected democratic ideals of inclusivity, but was also a unifier of Latvian society.

In 1991, mirroring the situation in 1940 when Latvia was occupied by Soviets, the new government of Latvia was charged with the task of introducing education policies that would turn previous doctrine on its head. Many Soviet era textbooks, particularly history textbooks, were no longer acceptable, and dissemination of information took place using the press. Articles in pedagogical and general press discussed in great detail theories of democratic education, proposed policies, and the future of education in general. Many articles about historical events also appeared, offering a Latvian interpretation of previously silenced events or those that been presented through the lens of Soviet Communist historiography.

During the first heady years of renewed independence, Latvian educators and policy makers were plunged into a maelstrom of discussion on how to implement democratic education. The West and its values had been demonised under Soviet rule, resulting in idealisation of all things Western by many Soviet citizens. Thus, Western practices became a role model for the new educational system of Latvia. A realisation of the inferior nature of the system under which they had been operating led to the initial attitude that everything foreign (i.e. Western) must be better, which was apparent as the government pursued policies and created agencies mirroring Western practice. This often resulted in a very superficial and idealised view of democratic teaching: Practical applications and suggestions were few and usually based on discussions held with visiting Western-trained educators or observations made on short visits to foreign countries.

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[8] P. Freire, *Pedagogy of the Oppressed*, 3rd ed., London, Bloomsbury Academic, 2000.

Former history teacher and current head of the Latvian National Centre for Education Guntars Catlaks published a study in 2001 that reviewed the educational reforms of the first ten years of Latvia's renewed statehood.[9] He reflected that education is a tool for reform, one that indicates the kind of society one wishes to have and which should instill in people desired characteristics, knowledge, and behaviour models. However, he also noted that education reacts slowly to changes in society.

Catlaks described the changes in education during the first approximately ten years of independence as consisting of two phases. The first phase, from 1989 to 1995, he characterised as a wave of liberalism and decentralisation and the belief that freedom itself would resolve various issues. A democratic model of education was already available – the only thing left to do was to implement it. However, he pointed out that the majority of educators in schools and institutes of higher education in the 1990s were products of the 1970s, revealing an underlying problem in the transference of skills required for democratic teaching to teachers who had no theoretical knowledge or practical experience teaching in such a manner. Not only were teachers not prepared methodologically for democratic teaching, but they also lacked a new curriculum for subjects that had been highly politicised under Soviet rule, most notably history.

With the introduction of glasnost and perestroika by Gorbachev in the late 1980s in the Soviet Union, Latvian educators finally had the opportunity to travel to democratic countries to witness democratic education in action. They were in awe of the various teaching and administration methods, school activities, and equipment available to teachers and students. The majority of the descriptions of these visits focused on resources available to teachers and administrators and, to a limited degree, the methods teachers used in their classrooms.

A director of a secondary school travelled to Finland for two weeks in 1990, and he reflected on his visit in the pedagogic newspaper *Izglītība* [Education].[10] He noted that democratic education included creation of parent councils and integration of schools into local communities, a trend that had already begun to appear in Latvia in the late 1980s. But his experience made him believe that students need more say in curriculum development and that curriculum should be geared to a changing society. He also highlighted the various teaching methods used by teachers and the use of technology in administration of Finnish schools. Teacher education was mentioned only in passing as an issue of preparedness for teaching in democratic schools, without any mention of actually changing the existing teacher education system in Latvia.

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[9] G. Catlaks, 'Demokrātiskās pārmaiņas izglītībā; valsts izglītības politikas pārskats 1991–2001' [Democratic changes in education; state educational policy review 1991–2001], *Providus*, 20 November 2001. Available: http://providus.lv/article/demokratiskas-parmainas-izglitiba-valsts-izglitibas-politikas-parskats-1991-2001 (accessed 13 September 2016).

[10] E. Vilks, 'Kurš teiks gala vārdu?' [Who has the final word?], *Izglītība* [Education], 3 January 1990, p. 6.

The possible difficulties of "re-educating" those in charge was also alluded to in 1990 by Aldonis Builis, the then Latvian SSR Minister of Education, who accurately noted that the "hardest nut to crack" would be the thought processes of those who worked in the "state machinery."[11] His statement is quite telling – as an instrument of that same state machinery, it was his job to ensure that all members of the education system followed the strict policies handed down from above. Perhaps his administrative experience in a highly centralised system gave him insight into the inevitable bureaucratic difficulties caused by a radical paradigm shift. But, it was not just the thinking of the school system's bureaucrats that would be difficult to change, but also that of the teachers.

Discussions on professional development were often dominated by administrative practice. Teacher education models were the main topic at a discussion session led by the head of the University of Latvia Faculty of Pedagogy held in 1994; however, press coverage indicates that proceedings focused on administrative issues regarding which type of higher education institution would be responsible for teacher preparation, questions of financing models for newly forming institutes of higher education, an upper age limit for mandatory schooling, and other administrative issues.[12] There was no mention of actual teacher preparation practice or models that could be attributed to democratic education, clearly indicating that bureaucratic restructuring of higher education institutions was paramount.

Yet, the importance of substantive teacher education was not totally absent. One of the rare articles to comment on teacher preparation stressed the role of the teacher as the centre of the democratic classroom in that s/he should allow children to express their opinions and that s/he should teach children to respect the opinions of others.[13] The author noted that the rector of the newly formed Riga Teacher Training and Educational Management Academy stressed the need to train teacher candidates for teaching in a democratic classroom and not to focus on their teaching subject, because they should already be sufficiently knowledgeable in their chosen teaching field. This may have been clear for subjects such as math and science, but politicised subjects, such as history, needed to be addressed directly. How this would take place was not discussed.

Zeiberte's[14] overview of the history of structural changes in organisation and management of teacher professional development since regaining

[11] A. Builis, 'Domu krustugunīs' [In the crossfire of opinions], *Izglītība* [Education], 7 February 1990, p. 4.

[12] D. Siliņa, 'Kā izglītosim skolotājus?' [How shall we educate teachers?], *Izglītība un Kultūra* [Education and Culture], 24 February 1994, p. 6.

[13] J. Stabiņš, 'Skolotājs – demokrātijas centrā?' [The teacher – in the centre of democracy?], *Izglītība un Kultūra* [Education and Culture], 30 May 1996, p. 8.

[14] L. Zeiberte, 'Reformu gaita Latvijas pedagogu tālākizglītības sistēmā pēc 1991.gada' [The course of reform in the Latvian teacher higher education system after 1991], *Daugavpils Universitātes 53. starptautiskās zinātniskās konferences materiāli* [Proceedings of the 53rd International Scientific Conference of Daugavpils University], Daugavpils, Daugavpils Universitātes Akadēmiskais apgāds Saule, 2011. Available: http://www.dukonference.lv/files/proceedings_of_conf/53konf/pedagogija/Zeiberte.pdf (accessed 20 September 2017).

independence indicated that the centralised top-down system was slowly turning to autonomy, resulting in a lack of systematic coordination of the continuing professional development of teachers. Most offerings were short-term theoretical seminars, which did not include practical applications: these projects did not guarantee quality and were not a substitute for long-term management of further education. All teachers were expected to participate in forms of continuing education, as were school administrators, but Zeiberte noted that a lack of strategic planning, succession, coherence, and continuity plagued teacher professional development.

In 1995, Armands Kalniņš, the then secretary of the Ministry of Education and Science (MoES), wrote about education leadership and characterised the period 1989–1995 as one of "restructuring" as opposed to reforms, stressing the need for sharing theories and being able to pick and choose the elements that most suited the situation.[15] His main criticisms of education reforms of this period centred on difficulties in systematizing the organisation of primary, secondary, and tertiary education, difficulties in the co-existence of new ideas with old traditions, lack of financing for administration and teaching resources, and finally, the lack of a conceptual vision. Most reforms dealt with decentralisation of the state education system, giving municipalities and townships control over local school administration. Decentralisation also focused on changes in curriculum, developing new student assessment and final exam criteria, creating and distributing new educational literature, and developing control systems to assess teaching efficacy, as well as the development of a private education system and associated accreditation criteria. This was particularly evident in tertiary education with the appearance of many private higher education institutions that competed with state schools, accompanied by the restructuring of education programmes and reclassifying of degrees issued during the Soviet era to adhere to a more European-looking education system. Yet, Kalniņš noted that there were those who were opposed to these changes, most frequently citing the supposed arbitrariness of the democratic system and the need for strong central control to ensure financing for the education system.

Regaining control (1995–1999). The second series of changes took place from 1995 to 1999 and are described by Catlaks[16] as a reaction to this wave of liberalism and decentralisation – attempts were made to regain state control and create standards for the education system. Many initiatives had taken place, but they were haphazard and were not balanced and coordinated throughout the education system. Progress was evaluated primarily by how well initiatives, initiated from above, had been implemented and not how these changes

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[15] A. Kalniņš, 'Izglītības vadības un reformu demokratizācija Latvijā' [Democratisation of education leadership and reforms in Latvia], *Latvijas Vēstnesis* [Latvian Herald], 18 May 1995. Available: https://www.vestnesis.lv/ta/id/27208, (accessed 20 September 2017).

[16] G. Catlaks, 'Demokrātiskās pārmaiņas izglītībā; valsts izglītības politikas pārskats 1991–2001' [Democratic changes in education; state educational policy review 1991–2001], *Providus*, 20 November 2001. Available: http://providus.lv/article/demokratiskas-parmainas-izglitiba-valsts-izglitibas-politikas-parskats-1991-2001 (accessed 13 October 2016).

affected teachers and students at all levels of the education system. The reforms did not consider the existing Soviet culture of education that had been in place throughout occupation, and it often appeared that the political elite were also not invested in the programme. Much like the overall reforms for education, the initiative for history teachers were fragmented and few and far-between.

The 2000 OECD report, which analysed higher education policies for teacher education, expressed concern that there was no mechanism or policies in place guaranteeing investment in solutions to reaching goals of national priority. Although higher education institutes played the main role in teacher preparation and continuing education, the existing well-meaning initiatives were primarily 'pilot projects' initiated from external sources and did not have the support of the main university-level educators or the government. The many colleges that had sprung up needed qualified instructors, but the traditional methods for preparation of university level lecturers and general education teachers were not appropriate for this level of instructors. In other words, all levels of education, including tertiary education, needed to be included in education reform.[17] This period was characterised by much public criticism of a system that had lost control of the education system and lost sight of the purpose of reforms. The OECD expert committee suggested that some of the decentralisation of education, which led to loss of control by the Ministry of Education over some education sectors, be abandoned, and a more equitable system be devised. The initial euphoria of democratic education practices had ended and calls for a return to familiar teaching practices became more vocal.

Finding a balance (1999–2004). The period from 1999 on focused on the positive realisation that adoption of new ideas could be combined with positive aspects from the existing culture of education. Lack of funding for many of the previously initiated reforms resulted in frustration, and many teachers called for returned focus on the student. There was a call for drawing on existing positive elements in the education system, and not just for initiatives from outside.[18] As regards the Ministry of Education, the report noted that many gradual changes had taken place, but there had been minimal strategic reforms.[19] The OECD viewed this as a critical point for Latvia, as it needed to create an education system based on a sense of ownership and belonging in order to achieve equity and harmony among the citizens of Latvia and the realities of life, the economy, and culture.[20] This included not only democratic teaching practices, but also creation of curriculum to unite the country.

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[17] Ekonomiskās sadarbības un attīstības organizācija (OECD), *Valsts izglītības politikas analīze – Latvija* [National Education Policy Analysis – Latvia], Ekonomiskās sadarbības un attīstības organizācija (OECD), 2000, p. 71. Available: http://viaa.gov.lv/files/news/521/oecdaug8.pdf (accessed 13 October 2016).

[18] Ibid., pp. 29, 75.

[19] Ibid., p. 20.

[20] Ibid., p. 75.

Challenges to teaching history

In addition to reforms in teaching practices and education administration, one of the most pressing problems after the renewal of independence was the creation of a national education programme that supported and encouraged the 'Latvianisation' of all educational processes for the purpose of creating a society in which non-ethnic Latvians would be fully integrated and able to function in Latvia. Fifty years of intense Russification and Sovietisation had left its mark, and renewed Latvian independence presented challenges to the creation of an inclusive society, which identified with the Latvian state. One of the most pressing issues was the recreation of a history curriculum that presented the Latvian version of Latvian history.

Under Soviet rule, the goal of history teaching was to create a Soviet interpretation of Latvia's history as a means to instill Soviet patriotism, create a worldview based on a unified system grounded in one correct version of history, and legitimise and glorify the existing regime. During Soviet occupation, history as a subject was uniform, and teachers had virtually no access to materials created during the interwar period or foreign sources. Inspired teachers who taught general history strove to find materials and methods that would make lessons more interesting for the pupils, but teaching 20th century history or Latvian history was often avoided because of its contentious content: existing teachers had been thoroughly indoctrinated in the Russo-centric version of history, which consistently denigrated the historic achievements of Latvia, particularly those of independent Latvia during the interwar period. This situation resulted in teachers, who were well trained in a unified Soviet historiography and formalist teaching approaches, having to suddenly adopt unfamiliar methodology as well as an unfamiliar curriculum.

Language issues also played a role. Many teachers were part of the Russian-speaking mass of migrants brought from other parts of the Soviet Union after World War II, most of whom had no knowledge of Latvian history and could not speak Latvian. However, being an ethnic Latvian was no guarantor of knowledge of a Latvian interpretation of history. Interviews with history teachers and students who taught and/or studied during Soviet occupation reveal that many parents and grandparents did not discuss life in independent Latvia or events they had witnessed during the war with their children and grandchildren as they feared that the child would inadvertently repeat this information at school, which could result in serious repercussions for the entire family.[21]

Thus, history teachers in Latvian schools in the 1990s were charged with implementing an untested, unknown, and, for some, a highly contentious history curriculum. The most pressing issue after the renewal of independence was acceptable history textbooks, admittedly the most widely used resource in

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[21] For an in-depth discussion of the memories of students and teachers of history in Soviet-occupied Latvia, see: A. Abens, 'The Effects of Authoritarianism on the Teaching of Latvian History', PhD diss., University of Latvia, 2011.

history classes. Removal of old textbooks in the early 1990s resulted in teachers, once again, creating new teaching materials to replace the ones that were no longer politically acceptable. Even textbooks about ancient history were pulled from the shelves because the focus was on class struggle, no longer an acceptable basis for the interpretation of history. Long-hidden interwar period history books were unearthed, but these too no longer reflected the needs and views of modern democratic education principles. New, more modern history textbooks were quickly created based on a Latvian historiography.

In general, since 1991, history teachers in Latvia have adopted the accepted notion of history as being a multi-faceted subject by using a neutral, factual approach to historic periods in attempts to be non-judgmental and present various perspectives on contentious historic issues. History textbook authors followed the traditional method of presenting information chronologically, focusing on names, dates, and places. Simplified Latvian history textbooks were created for elementary school pupils, which were translated into Russian, indicating the need to present the Latvian interpretation of history to a large Russian-speaking minority.

Most notably, they have moved away from the blatant nationalism characteristic of the Soviet totalitarian regime. As a point of comparison in the discussion of the 12th–13th century Teutonic invasions, a modern Latvian history textbook for secondary schools[22] is much more accurate in its description of locations and tribes using historic names, not modern national identifiers. The maps used to describe events of the time are localised, but they also include others maps that show Latvian territory within the framework of Europe to help students understand why the local map looks as it does. Language in the book is not sanitised to make Latvians look more positive in historic context, nor does it glorify historic successes. However, it is laden with text, illustrations, and tables, and although it offers differing views of historic events in Latvian history, it does not pose questions for thought or reflection, nor does it attempt to explain differences of interpretations of facts. Such descriptions might help to build student awareness of different interpretations of history and develop historical thinking. History teaching has often been touted as an exemplary forum for utilizing various teaching methods for developing critical thinking skills. These methods encourage moving away from old-fashioned history lesson with teacher-driven acquisition of 'acts and facts'[23] towards a more democratic classroom in which student-centred activities encourage discussion of citizenship and multiple historic narratives. That this had not occurred in terms of history textbook writing is apparent in the 2000 OECD report comment that Latvian textbooks in general reflected adherence to

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[22] G. Kurlovičs, A. Tomašūns, *Latvijas vēsture vidusskolai*, 1.sēj. [Latvian History for Secondary school, vol.1], Rīga, Zvaigzne ABC, 1999.

[23] M. Depaepe, 'Dealing with the Historic Paradoxes of a Globalised Educationalisation – A Way to Write the "New" Cultural History of Education?,' in M. Cijntje-Van Enckevort, M. George (eds.), *Re-thinking Education in the Caribbean: Yesterday, Today and Tomorrow – A Local Imperative in a Global Context*, Philipsburg (N.A.), University of St. Martin, 2006, p. 37.

antiquated teaching standards: in order to support teachers' efforts in applying new teaching methods, new books were needed.[24]

Some historians and academics addressed this problem by creating some methodological resources, which openly discussed the problems of various interpretations of historic facts and even offered lesson plans with guidelines for democratic approaches to teaching contentious issues.

Gundare introduced a handbook on history teaching in which she stressed that times have changed and there is no longer a 'correct' history, and that as long as Latvia is a democratic nation and society, differing views and opinions will be tolerated, if not respected.[25] This handbook was designed for teachers to review the most contentious aspects of Latvian history and to help overcome the divisions in modern Latvian society.

In this same handbook, Ķīlis offered a social anthropological view of history as a point of reference for teachers,[26] which differed greatly from the one in which they were educated during the Soviet era. The handbook presented concrete lesson plans and suggestions on how to teach what can be considered the most debated historic periods in Latvian history, including the incorporation of Latvian territories into the Russian empire during the reign of Peter I, the Ulmanis regime, activities of Latvian soldiers in the German and Soviet armies during World War II, the resistance and partisan activities following World War II, and the collectivisation of the Latvian countryside. The handbook, published by the Latvian History Teacher Association, was also translated into Russian indicating that Latvian history continued to be taught by Russian-speaking teachers to Russian-speaking pupils.

A collection of papers presented at conferences of Lithuanian and Latvian history teachers at Daugavpils University from 1998 to 2001[27] gives several examples of history lessons and methods being used at the time. Of the five papers published in Latvian, all discussed methods of teaching but had no reflections on actual lessons. One lesson on patriotic up-bringing during history lessons in Grade 5 discussed the necessity of teaching history at a local level for instilling patriotism. This could be achieved through trips to locally significant places and revisited later outside of class on weekends or holidays in cooperation with the homeroom teacher and the prescribed advisory curriculum. Use of competitions to test student knowledge, enjoyed by all students regardless of

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[24] Ekonomiskās sadarbības un attīstības organizācija (OECD), *Valsts izglītības politikas analīze – Latvija* [National Education Policy Analysis – Latvia], Ekonomiskās sadarbības un attīstības organizācija (OECD), 2000, p. 28. Available: http://viaa.gov.lv/files/news/521/oecdaug8.pdf (accessed 13 October 2016).

[25] I. Gundare (ed.), *Pretrunīga vēsture* [Contradictory history], Rīga, Latvijas Vēstures skolotāju asociācija, 2000, p. 5.

[26] R. Ķīlis, 'Vēstures pretrunīgums: interpretācijas, fakti, notikumi' [Historic contradictions: Interpretations, facts, events], in I. Gundare (ed.), *Pretrunīga vēsture* [Contradictory history], Rīga, Latvijas Vēstures skolotāju asociācija, 2000, pp. 8-12.

[27] I. Saleniece, I. Šēnberga (eds.), *Vēstures mācību aktualitātes skolā – DU vēstures katedras II-IV metodiskās konferences rakstu krājums* [Developments in history teaching in schools – DU history department II-IV methodology conference papers], Daugavpils, Saule, 2001.

level of knowledge, was also a suggested method. Students could also be placed in the role of tour guide who would explain facts to fellow students.[28] However, the methods suggested are not much different than previously used Soviet methods and differ mainly in that the terms 'democratic nation' and 'European citizen' replaced 'socialism' or 'communism' and 'Soviet citizen'. They are replicative in nature, and do not offer students opportunities to critically assess, analyse, or offer deeper explanations for events. Suggestions on implementation were not given, and reflections on actual lessons or more modern methods of developing critical thinking skills were lacking. Perhaps this can be explained by the lack of experience Latvian history teachers had with the democratic teaching process in their teacher education, which was exacerbated by a lack of didactic texts and examples of good practice in the Latvian context. This also supports the 2000 OECD assessment that teachers do not understand how to differentiate between skills and knowledge, indicating that more intensive teacher training is needed.[29]

The use of local history, as mentioned above, to introduce historical thinking and develop a sense of national identity among younger students is a common feature in history curricula in democracies. Yet in Latvia, this has not had the desired effect, as noted in the 2004/2005 joint United Nations Development Programme and Advanced Social and Political Research Institute (ASPRI) of the University of Latvia report.[30] The report analysed surveys and interviews with educators throughout Latvia. It noted that national identity and a sense of belonging that turns separate individuals into a civic and responsible society are high in Latvia, yet conflicting,[31] with the greatest differences in the sense of belonging based on ethnic affiliation.[32] On a national level, the vast majority of citizens (92%) felt an affiliation with Latvia,[33] but as regards regional identity, non-ethnic Latvians (i.e. Russian-speakers) tended to look east to Russia while ethnic Latvians identified with Europe.[34] These identifiers clearly have roots in history, as most Russian-speakers were relatively recent migrants or their descendants from Soviet republics (most notably Russia, Ukraine, and Belarus), but Latvia's cultural history is firmly tied to Europe. While Russian-speakers have

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[28] L. Brokāne, 'Patriotiska audzināšana' [Patriotic upbringing], *Vēstures mācību aktualitātes skolā – DU vēstures katedras II-IV metodiskās konferences rakstu krājums* [Developments in history teaching in schools – DU history department II-IV methodology conference papers], Daugavpils, Saule, 2001, pp. 40-43.

[29] Ekonomiskās sadarbības un attīstības organizācija (OECD), *Valsts izglītības politikas analīze – Latvija* [National Education Policy Analysis – Latvia], Ekonomiskās sadarbības un attīstības organizācija (OECD), 2000, pp. 28-29. Available: http://viaa.gov.lv/files/news/521/oecdaug8.pdf (accessed 13 October 2016).

[30] A. Zobena (ed.), *Latvian Human Development Report*, Riga, UNDP Latvija, 2005, p. xx. Available: http://www.szf.lu.lv/fileadmin/user_upload/szf_faili/Petnieciba/sppi/tautas/Demokratijas_atskaite_9.pdf (accessed 13 October 2016).

[31] Ibid., p. 44.

[32] Ibid., p. 28.

[33] Ibid., p. 109.

[34] Ibid., p. 28.

been integrated into economic processes, they have not discovered common values in the cultural space, as demonstrated by the considerable number of that segment of the population that does not speak Latvian and has little knowledge of Latvian history and Latvian cultural values, cultural peculiarities, and cultural codes. At the time of writing, the report's authors noted that a comparatively narrow circle of specialists were aware of the importance of cultural historical legacy – local, national, and regional – for the development of identity.[35] In addition, the suggested list of tasks and recommendations to help develop a sense of identity did not include school or history teaching as a way to promote positive identity affiliations.[36]

Thus, it is no surprise that a debate ensued about whether to teach Latvian history as a separate subject or incorporate it into the general course of world history. After regaining independence, Latvian history was included within the framework of European and world history. During Soviet occupation, USSR history, and later the history of the Latvian SSR, had been taught as a separate subject apart from general world history. In 1999, the Humanities and Social Sciences department at the Academy of Sciences called for the introduction of the teaching of Latvian history as a separate subject in Latvian schools.[37] The difficulties of introducing this proposal were highlighted by discussion of the costs incurred in the creation of methodological materials necessary for a separate Latvian history course. These difficulties were attributed to teachers who were not qualified to teach history or who were not trained historians. It was also noted that this could particularly affect Russian and other minority language schools in which students may have had experience with alternative interpretations of particularly contentious events in Latvian history. However, as noted, a sufficient number of Latvian history books were already available to teachers and the quality of the lessons would depend highly on the interest of the teachers in the subject matter and an "honest" approach by the teacher to interpretations of documents and facts available. Teachers who were able to utilise creative teaching methods would also have no problem teaching this additional subject. Yet, the debate did not focus on teaching methods, but rather on acquisition of additional facts, resulting in an added burden on teachers, as well as students, due to insufficient time to acquire an already dense curriculum.

A separate course for Latvian history took over ten years to develop and was only implemented in the 2011/2012 school year. Although much of the debate focused on financial and methodological issues, this lengthy preparation period clearly indicates the highly politicised and conflicting views on teaching Latvian history, resulting from the not-so-distant Soviet occupation during which Latvian history teaching had been highly politicised in the public sphere and

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[35] A. Zobena (ed.), *Latvian Human Development Report*, Riga, UNDP Latvija, 2005, pp. 44-45.

[36] Ibid., pp. 109-112.

[37] A. Cālīte, 'Latvijas vēsture sakņojas katrā dzimtā' [Latvian history originates in every family], *LV Portāls*, 28 June 2011. Available: http://m.lvportals.lv/visi/likumi-prakse?id=232196 (accessed 13 October 2016).

which often conflicted with the version of history discussed in private.[38] Yet, the additional material needed to be covered for testing purposes, resulting in continued focus on fact acquisition.

Continued adherence to teacher-centred methodology is often self-inflicted by teachers trying to reach state-mandated curriculum standards to guarantee student performance in comprehensive tests.[39] This body of knowledge is almost always too vast, and testing requires students to acquire information to prove their knowledge. Students then quickly forget it in preparation for the next test, resulting in superficial understanding and a sense that knowledge is created by authorities from above, neglecting the students as stakeholders in the educational process. In fact, the majority of Latvian educators and teachers across the board admitted that teaching in Latvia was firmly grounded in the acquisition of facts and not in the development of critical thinking skills and application of knowledge to real life situations.[40] In tune with the growing trend for a return to a more controlled system, a standardised centralised exam in history was piloted in 1996/1997.

A 2002 report on the introduction of centralised exams[41] analysed the process and policies. The report concluded that the secondary school system, as it had been developed during Soviet occupation, remained intact, but that entry to higher education had lost its elite status and was now available to the masses. To facilitate this process, centralised exams would eliminate the need for separate secondary school finals and higher education entrance exams by combining them into one, which reflected practice generally accepted in Europe. Yet, the report also noted that this centralised exam encouraged studying for the test, with no opportunity for feedback; however, the main function was not to assess individual performance, but rather determine how well a school was teaching its students,[42] a commonly noted purpose for centralised examinations.

The centralised exam in history was created in three parts: the first tested factual knowledge (worth 40% of the total mark); the second tested ability to work with primary sources (also worth 40%); and the final section required the students to analyse material (worth 20%). The second and third exam sections were created to see how well a student could analyse the material presented. Analysis of results showed that students did not do very well overall, with weak results in the second section and even poorer results in the third.

[38] For an in-depth discussion on the 'folklorisation' of Latvian history, see: A. Abens, 'The Effects of Authoritarianism on the Teaching of Latvian History', PhD diss., University of Latvia, 2011.

[39] L. Cuban, 'Hugging the Middle Teaching in an Era of Testing and Accountability, 1980–2005,' *Education Policy Analysis Archives,* vol. 15, 2007, pp. 1-27.

[40] Ekonomiskās sadarbības un attīstības organizācija (OECD), *Valsts izglītības politikas analīze – Latvija* [National Education Policy Analysis – Latvia], Ekonomiskās sadarbības un attīstības organizācija (OECD), 2000, p. 28. Available: http://viaa.gov.lv/files/news/521/oecdaug8.pdf (accessed 13 October 2016).

[41] *Centralizēto eksāmenu ieviešana* [Introduction of centralised examinations], Rīga, Baltijas Sociālo zinātņu institūts, 2002. Available: http://www.biss.soc.lv/downloads/resources/centrEks/centrEks.pdf (accessed 13 October 2016).

[42] Ibid., p. 5.

It was noted, that the low weight given to the most difficult part of the test – analysis – encouraged some students to ignore this section altogether or write something nonsensical. While deficiencies in the centralised exam system were identified and improvements suggested, most notably by increasing the value of the analysis part of the test, the report noted that it was still a more equitable system for university entrance.[43] The acknowledged benefits of centralised exams notwithstanding, the report clearly indicated that history teaching and learning had yet to adopt more democratic teaching principles.

Democratic teaching principles can only be achieved through development of critical thinking skills, a subject that was briefly touched upon, but true reflection on this as practice appeared to be lacking in discussion on democratic education practice in general and the teaching of history specifically in Latvia. Rubene[44] noted that educational institutions as social structures have traditionally been conservative, but the nature of the Soviet school system, where schools were specifically subjected to totalitarian ideological norms and standards, has resulted in the continuation of a closed social model, even after political transformations have taken place. She continued that educational institutions are not only catalysts for social change through reforms in the system but through particular emphasis on participation in emancipatory and self-determination processes.[45] This appeared to be lacking, as demonstrated by comments made by a parent whose children attended school in the early 2000s and who testified to a lack of this process in history lessons. She noted the similarity between the Soviet era and the current era:

> It upsets me more that supposedly correct history teaching today is entrusted to 'strange' teachers – my youngest son can't stand history. I went to [his] school – the history teacher there is a formalist, pedantic, and completely stiff. History has to be recited like a verse, and when opinions are requested, they have to concur with the teacher's. This was clear 30 years ago when that was required by a foreign power, but now? I have no supporting arguments to say that this type of history teaching is important.[46]

This reflection on the state of the teaching of history indicates that the shift from the authoritarian style of teaching to one characteristic of democracies is not a simple process. This discussion of the post-Soviet era of history teaching indicates a progression and growth of Latvian awareness in history teaching that conflicts with the internalised motivation and purpose as experienced during the Soviet regime. The current ruling order professes to view history from

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[43] Ibid., pp. 61-63.
[44] Z. Rubene, 'Jauniešu kritiskās domāšanas izpēte studiju procesā universitātē' [Research on critical thinking in youth in the study process in university], PhD diss., University of Latvia, 2003, p. 244.
[45] Ibid., p. 156.
[46] A. Abens, 'The Effects of Authoritarianism on the Teaching of Latvian History,' PhD diss., University of Latvia, 2011, p. 171.

a democratic perspective in which a unified history creating a unified identity is no longer considered to be positive trait. The purpose of history teaching continues to emphasise gaining knowledge, although modern democratic principles would encourage a stress on critical-thinking.

History taught in schools is required to obey political demands and must respond to the pressures of the socio-cultural context in which it is taught. In some contemporary societies, it is demanded that the memories of particular groups or communities, sometimes considered the 'Other' are taken account of in the history curriculum. UNESCO suggests that by providing reliable texts and sources that help students to see the perspective of the 'Other', we can hope to move students from an adherence to a mythologised past to a meaningful historical understanding.[47] This can be achieved by creating enquiry questions to engage students, rather than recitation of facts and figures, in which there are sometimes omissions and distortions and that offer a superficial view. UNESCO's document notes that such distortions and omissions do not always represent a conscious attempt to present a narrow and one-sided view of history on the part of textbook authors; rather, they are the product of the wider political and cultural context in which history textbooks are written.[48] The overt Russo-centric nationalism apparent in Soviet history textbooks may have resulted in an internalised aversion to creation of Latvian history books that 'glorify' Latvian history, as well as the teaching of Latvian history that does the same. Yet, the presence of a significant number of inhabitants who do not have a lengthy historical connection to Latvia may require such an approach so that they understand local cultural codes and values and become more integrated into Latvian society.

Many history teachers in Latvia have also declared that teaching Latvian history separately results in confusion among students about the interconnectedness of events in Latvia, Europe, and the world as a whole. The Latvian History Teacher Society has also publicly come out against teaching Latvian history as a separate subject, supporting the overall principles of EUROCLIO (European Association of History Educators), of which it is a member, that encourages supranational history education to support and strengthen democratic principles. The stress on supranational history may be a backlash against war on European soil, notably World War II and other conflicts, in which specific ethnic and religious groups have been objectified and targeted. Some Latvian historians still associated national history teaching with hero glorification and stress on accomplishments and struggle, possibly indicating negative associations with the way history was once taught. Historian Juris Celmiņš questioned whether the actual issue was history content or

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[47] Islamic Educational, Scientific and Cultural Organisation, et al., *Guidebook for History Textbook Authors*, UNESCO, 2012, p. 15. Available: https://unesdoc.unesco.org/ark:/48223/pf0000227041?posInSet=1&queryId=0377d35d-3ce5-4508-8ce8-9766da557428 (accessed 13 October 2016).

[48] Ibid., p. 19.

rather teacher inability to use appropriate, modern teaching practices,[49] clearly indicating that by 2004, society, historians, and teachers had yet to overcome certain stereotypes, including those associated with national history teaching and patriotism. The glorified patriotism endemic in the Soviet system may have been and may continue to be a bad memory, resulting in a practice of avoidance of national history teaching.

The discussion of the realities of history teaching in renewed independence reveal problems of an ageing teaching staff, educated under the Soviet system, who have not embraced democratic teaching practices, indicating that many formalist practices have become internalised. Younger teachers, educated after 1991, continued to propagate these teaching practices indicating that a shift towards a more open and creative methodology does not occur naturally and must be not only be taught, but also practiced.

Conclusion

There is an old adage in the field of education – we teach as we were taught. If this is true, it is no wonder that democratic teaching practices are yet to be accepted and used widely in Latvia. This discussion of democratic teaching practice in post-Soviet Latvia indicates that progress and growth of Latvian awareness of democratic teaching processes conflicts with internalised motivation and purpose and has, indeed, resulted only in a restructuring of the education system, as noted in 1995 by MoES secretary Kalniņš, including the weakening of the role of the Ministry overall. The purpose of history teaching and education in general continues to stress knowledge acquisition, rather than critical thinking processes. Research in curriculum continues to be the domain of professional historians, although research on methods and materials is often taken on by teachers pursuing higher education. History books generally reflect the study of Latvian history through a European-centric lens. The discussion of the realities of teaching indicates that a shift away from internalised methodology towards more open and creative practices does not occur naturally.

History teaching in the post-Soviet period of Latvian independence reflects various views of history that include internalised Soviet axioms, historic interpretations adopted from the interwar period, and modern views. Research in general education practices, as well as the content of history textbooks, are quite liberal and focus on the most modern educational perspectives. Access to funding for teacher training has increased. But, adopting democratic teaching practices, as we understand them today, has proven to be a difficult challenge for those societies that have experienced a sudden break in political systems, transferring from authoritarianism to democracy. This sudden break

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49 J. Celmiņš, 'Latvijas vēstures mācīšana stereotipu gūstā' [Latvian history teaching as a captive of stereotypes], *Providus*, 29 November 2005. Available: http://providus.lv/article/latvijas-vestures-macisana-stereotipu-gusta (accessed 24 February 2017).

is also a challenge for teachers, who must now teach a history curriculum that contradicts the Soviet historiography they had once accepted and may still accept to be fact. It is clear that simply adopting the practices used in countries with lengthy democratic experience does not consider the baggage that newly democratic societies bring with them. Sometimes the pendulum swings wildly from one side to the other, and finding a practical balance that addresses all issues is certainly not without its pitfalls.

Latvia joined the EU in 2004 and in rhetoric, at least, has adopted the democratic values supported by the EU. However, recent political events in Europe have caused these values to come into question. The concepts of integration and tolerance upon which European society are based have recently come under attack and are often considered to be indications of loose morality and the 'cosmopolitan' nature of Western European society. Even in what are considered established Western European democracies, the discussion about history curriculum revolves around nationalism in the face of multiculturalism, which appears to threaten a sense of national identity.[50] Shifts in these views have also occurred in Latvia on a national level with the introduction of legislation that supposes to define moral and patriotic values.[51]

The question remains whether methods adopted through a teacher's lived experience are changeable through education alone. Perhaps more radical changes in the teacher preparation system and an entire generational change need to take place before the education system can be considered reflective of the democratic ideals proposed by the various bodies involved in the teaching and learning process.

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[50] 'Notes on a Small Island', *The Economist*, 20 August 2005, p. 24; D. Bilefsky, 'Modern Belgians Return to 'Glorious' Middles Ages', *International Herald Tribune*, 4 April 2007, pp. 1-8.

[51] G. Valdmanis, 'Pēc garām diskusijām Saeima tomēr apstiprina skolotāju "lojalitātes grozījumus"' [After lengthy discussion, Parliament adopts teacher 'loyalty changes'], *Latvijas Sabiedriskie Mediji* [Public broadcasting of Latvia], 23 November 2016. Available: http://www.lsm.lv/lv/raksts/latvija/zinas/pec-garam-diskusijam-saeima-tomer-apstiprina-skolotaju-lojalitates-grozijumus.a211388/ (accessed 20 September 2017).

History Education: The Case of Estonia

Mare Oja

Abstract. This paper presents an overview of changes in history teaching/learning in the general education system during the transition period from Soviet dictatorship to democracy in the renewed state of Estonia. The main dimensions revealed in this study are conception and content of Estonian history education, curriculum and syllabi development, new understanding of teaching and learning processes, and methods and assessment. Research is based on review of documents and media, content analysis of textbooks and other teaching aids as well as interviews with teachers and experts. The change in the curriculum and methodology of history education had some critical points due to a gap in the content of Soviet era textbooks and new programmes as well as due to a gap between teacher attitudes and levels of knowledge between Russian and Estonian schools. The central task of history education was to formulate the focus and objectives of teaching the subject and balance the historical knowledge, skills, values, and attitudes in the learning process. New values and methodical requirements were included in the general curriculum as well as in the syllabus of history education and in teacher professional development.

Keywords: history education, history curriculum, methodology

Introduction

Changes in history teaching began with the Teachers' Congress in 1987 when Estonia was still under Soviet rule. The movement towards democratic education emphasised national culture and Estonian ethnicity and increased freedom of choice for schools. In history studies, curriculum with alternative content and a special course of Estonian history was developed. In the Soviet school, Estonian history was taught fragmentarily and from an imperial position. Due to rapid political changes, textbooks were largely outdated, and teachers created study materials based mainly on printed media. In history, the 'blank pages,' i.e. events and phenomena that were not dealt with in Soviet society or lacked adequate information, were filled. Not everyone was prepared to abandon Soviet-style traditions, fearing Moscow's power or the return of the former regime.[1]

On 20 August 1991, the Supreme Council of the Republic of Estonia passed 'On National Independence of Estonia' restoring the independent state.

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[1] For example, the compiler of the first materials published in 1989, Silvia Õispuu, had difficulty finding historians who would agree to write about the period of the first independence (1918–1940). Silvia Õispuu, interview by Mare Oja, 11 October 2015, Personal archives of Mare Oja.

A democratic understanding of education put student skills development at the centre of teaching/learning and supported diversification of choice. From 1991 to 2004, laws were adopted including the first national curriculum (1996) and the amended and revised version (2002), which set out the demands and content of history studies. Over the years, the content, perceptions of teaching and learning and methodology, assessment, and teacher roles were transformed.

This study presents overview of changes in history teaching/learning in the general education system during transition period from Soviet dictatorship to democracy in Estonia. The main topics are concept and content of Estonian history education, curriculum and syllabi development, new understanding of teaching/learning processes, methods, and assessment.

Updating subject content and syllabus development

History teaching in the Soviet Union until 1987 was characterised by a more prominent position of the history of Soviet Union compared to national histories. The changes consisted of increasing or decreasing the number of history lessons as well as emphasis on Soviet ideological education (e.g., the appreciation of atheistic education, etc.). Substantive changes in history studies remained minimal.[2] This was also reflected in the programmes[3] and methodological aids issued by the Ministry of Education of Soviet Estonia.

The Teachers' Congress in 1987 was followed by brainstorming sessions from which a group of volunteers emerged who began to update the subject content of history. Work began at the Institute for Research in Pedagogy,[4] which coordinated the development of history studies under the guidance of the Ministry of Education at the end of the 1980s and early 1990s. In 1993, curriculum development was moved to the Estonian State Board of Education[5] and from 1996, after the liquidation of the institution, the Ministry of Education took over.

In October 2000, when the University of Tartu won the competition for the development of national curricula for the Ministry of Education and Research, the Centre for Educational Studies and Curriculum Development

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2   A. Raudsepp, 'Ajaloo õpetamise korraldus Eesti NSV eesti õppekeelega üldhariduskoolides 1944–1985' [The organisation of history teaching in Estonian-speaking Schools in Estonian SSR in 1944–1985], PhD diss., University of Tartu, 2005, pp. 66, 67, 74.

3   During the Soviet era, the Ministry of Education issued detailed descriptions of the learning process – programmes for all subjects: how many hours to focus on different topics, most important knowledge, methodological suggestions, etc. Very little freedom for teachers was left.

4   Silvia Õispuu, interview by Mare Oja, 11 October 2015, Personal archives of Mare Oja.

5   'Kultuuri – ja haridusministri määrused. Riigi Kooliameti põhimääruse kinnitamine. RT 1993, 12.0' [Regulations of the Minister of Culture and Education. Approval of the Statutes of the State Board of Education. The Parliament Acts 1993, Act no. 12.0], *Ministry of Education and Culture*, no. 5, 20 May 1993. Available: https://www.riigiteataja.ee/akt/24461 (accessed 02.05.2020).

(Curriculum Development Centre)[6] was established at the University of Tartu and coordinated the development of primary, basic, and secondary education curricula, especially the general introduction of the curriculum. The subject syllabi of the National Curriculum 2002 were still prepared by national subject councils[7] under the coordination of the Ministry of Education. The subject council played a significant role in decisions on history education. Subject councils assessed textbooks and workbooks and discussed issues of subject matter such as content of student competitions ('Olympiads'), final examinations after graduation from basic school,[8] national examinations after secondary level,[9] and recommendations for improving subject teaching. In 2002, an information day was organised for history teachers in vocational education institutions.[10] In September 2003, general education history teachers were provided with information.[11] Subject councils were the focal point for delivering educational policy decisions to teachers.

Transition period for new study programs 1988–1992

The primary aim was to dismantle the unified Soviet syllabus and teach more Estonian history. In 1988, experimental programs were developed to present less-politicised prehistory, ancient, and Middle Ages history. Estonian history was still taught from the point of view of the Soviet Union. General guidelines were still Soviet: bureaucratic vocabulary was still used, referring to quotes by Lenin and decisions made by the 27th Congress of the Communist Party. Simultaneously, it was acknowledged that the past should be discussed publicly and honestly to overcome falsification of history prevalent during the Soviet era. Gorbachev's *perestroika* and *glasnost* made public discussion

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[6] 'Keskusest' [About the Center]. Available: http://www.curriculum.ut.ee/et/keskusest (accessed 23.02.2015).

[7] The subject councils were advisory councils of the Ministry of Education, which were already discussing issues of teaching subject matter during the Soviet era. In Estonia in 1996, the Minister of Education decreed formation of subject councils as advisory bodies on subject studies: See 'Üleriigiliste ainenõukogude moodustamine. Ministri käskkiri nr. 51, 12.03.1996 [Foundation of nationwide subject councils. Decree of the Minister no. 51, 12.03.1996.], Archive of the Ministry of Education and Science, file 2-1-6 (1). Available: https://www.riigiteataja.ee/akt/73189 (accessed 2.05.2020); 'Üleriigiliste ainenõukogude moodustamine, ülesanded ja töökord. Haridus- ja teadusministri käskkiri nr. 367, 26.03.2008. [Foundation, tasks and rules of procedure of nationwide subject councils. Decree of the Minister of Education and Science no. 367, 26.03.2008.], Archive of the Ministry of Education and Science, sari [series] 1.1-2/2008.

[8] Basic school (grades 1-9, pupils aged 7-15/16) is compulsory education in Estonia.

[9] The first national examinations were introduced 1997. Estonian language, mathematics, and one foreign language were compulsory. Examination in history was optional. Universities accepted results of national examinations as entrance exams for university. Optional state exams could be taken until 2013.

[10] 'Ajaloo ainenõukogu koosoleku protokoll, 20.09.2002 Ainenõukogude protokollid 2001–2003' [The report of the meeting of the Council of History, 20.09.2002. Reports of subject councils 2001–2003], in *Riiklik Eksami- ja Kvalifikatsioonikeskus* [State Center for Examination and Qualification series], vol. 3-12, 2003.

[11] Ibid.

possible. Humans became the center of history teaching, but the justifying concept was sought in Marxism classics. The need to stimulate the skills of formulating and justifying personal opinion was also highlighted,[12] unlike Soviet fact-based history teaching. Educational literature was recognised as obsolete. History teachers were asked to follow the press and use the latest viewpoints found in media, published documentary collections, Estonian Radio and Television programmes as well as Soviet press, Mikhail Gorbachev and Alexander Jakovlev's statements,[13] and articles by outstanding historians. Lenin's books, recommended for discussion of several historical topics, were also considered valuable in teaching.[14] Although state control began to decline in 1988/89, the 'old' and the 'new' remained side by side for some time in history materials and ways of thinking. This was illustrated by Lenin's statue and the Estonian national flag (banned during the Soviet era) adjacent to the main road. However, abandonment of the old concepts may have been difficult in light of new discoveries in history as one teacher recognised: "I really believed that Lenin was good."[15]

Soviet textbooks were no longer relevant as they had marginalized Estonian history and taught it only from the point of view of the empire, so teachers prepared for lessons by using university materials and lecture notes. One teacher recalled: "I had to start teaching the history of Estonia in secondary school in 1989. I went to Tartu University library to compile a summary based on a university textbook *Estonian history* volumes I-III, and I also looked for materials about the [first] Republic of Estonia." Teachers explained history to students in a lecture and students took notes. Teachers sought information from several sources so lectures were a legitimate learning/teaching method. Student interest in history was very high during the transition period. They brought grandparents' diaries to school, pre-Soviet history books, and other sources that were studied with the teacher and classmates.[16]

A teacher recalled watching documentaries about Estonian history, which was commented on by historian Lauri Vahtre.[17] "We went with our students to

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[12] *Ajalugu IV–XI klassile.* Üldhariduskooli programmid [History for 4-9 grades. Syllabi for compulsory school], Tallinn, Eesti NSV Haridusministeerium, 1988, pp. 3-4.

[13] Alexander Nikolaevich Yakovlev was a Soviet politician and historian. During the 1980s, he was a member of the Politburo and Secretariat of the USSR Communist Party. Known as the "godfather of *glasnost*", he is considered to be the intellectual force behind Mikhail Gorbachev's reform *glasnost* and *perestroika* programmes. Yakovlev was the first Soviet politician to acknowledge the existence of the secret protocols of the 1939 Molotov-Ribbentrop Pact between Nazi Germany and the USSR.

[14] J. Nurmik (ed.), *Uutest programmidest ja õppemeetodilisest kirjandusest 1988/89.* õppeaastal [On new programmes and methodological literature in 1988/89 academic year], Tallinn, Eesti NSV Haridusministeerium, 1988, p. 7.

[15] M. Oja, 'Muutused üldhariduskooli ajalooõpetuses alates 1987.aastast – nõukogulikust täna-päevaseks' [Changes in compulsory school history education since 1987 – from Soviet to present], PhD diss., Tallinn University, 2016, p. 306.

[16] Ibid., pp. 307-308.

[17] Lauri Vahtre is an Estonian politician, historian, writer, screenwriter, translator, and author of several history textbooks.

Rakvere ... to watch this program; the hall was full of students and teachers. In the early 1990s, there was a television show 'Stories from past times,' which contained summaries of Estonian history. We watched those lessons, it was good illustrative material."[18]

In 1989, there were two variations of the history curriculum: 1) the All-Union in which it was recommended to combine Estonian history with the corresponding topics of the history of the Soviet Union and 2) the new projected programme drawn up by the program work groups.[19] Teachers could choose which of the programmes to work with.

The first new study plan was approved by the Estonian SSR National Education Committee in the spring of 1989. History was taught from 5th to 9th grade for two lessons per week. In tenth grade, history teaching was divided into compulsory two lessons per week for everyone and an optional additional three lessons per week for humanities-based studies. Sciences-based studies also had only two lessons per week. Grades 11 and 12 had three history classes per week.[20] In-depth history was an optional elective course.

The topics of the programs were presented class-by-class and lesson-by-lesson in the teacher guide, including exercises and examples of integration between different subjects, key concepts, and historical figures and events. Outcomes for the end of each grade were summarised. This detailed description helped teachers plan subject teaching as well the textbook authors to follow the guidelines, but left teachers little opportunity to plan independently.

In 1989/90, Estonian general education schools adopted a new curriculum.[21] The history syllabus was developed as a linear course of world history with main topics of Estonian history[22] instead of the former curriculum of USSR and foreign country history. In the 11th grade, a systematic course of Estonian history was added (three classes per week), the most significant update to

[18] M. Oja, 'Muutused üldhariduskooli ajalooõpetuses alates 1987. aastast – nõukogulikust täna-päevaseks' [Changes in compulsory school history education since 1987 – from Soviet to present], PhD diss., Tallinn University, 2016, p. 307.

[19] S. Õispuu (ed.), Täiendused 1988. *aastal ilmunud ajalooprogrammide juurde* [Supplements on history programmes published in 1988], Tallinn, Eesti NSV Riiklik Hariduskomitee, Tallinn, 1989, p. 3.

[20] 'Muudatustest haridustöötajate töö normeerimisel ja tasustamisel ning õpilaste materiaalsel kindlustamisel. Eesti NSV Riikliku Hariduskomitee käskkiri nr 118, 14.11.1988.' [Changes in the standardization and remuneration of the work of educators and in the material provision of students. Decree of the ESSR State Committee of Education no. 118, 14.11.1988.], *Infobülletään* [Info Bulletin], no. 1, 1989.

[21] 'Üldhariduskooli õppeplaan 1989/90. Õppeaastaks. Eesti NSV Riikliku Hariduskomitee 11. aprilli 1989. a käskkiri nr 177' [Curriculum for compulsory school for 1989/90 academic year. Decree of ESSR State Committee of Education no. 177, 11 April 1989.], *Infobülletään* [Info Bulletin], no. 1, 1989.

[22] J. Nurmik (ed.), 'Programmidest ja õppemetoodilisest kirjandusest 1989/90. Õppeaastal' [On programmes and methodological literature in 1989/90 academic year], EPAM [Archival Museum of Estonian Pedagogics at the University of Tallinn], R29296, p. 35; S Õispuu (ed.), *Täiendused 1988. aastal ilmunud ajalooprogrammide juurde* [Supplements on history programmes published in 1988], Tallinn, Eesti NSV Riiklik Hariduskomitee, 1989.

the study plan. The purpose of teaching Estonian history[23] was to shape learners' understanding of the development of the history of Estonian people in the context of world history.

Russian-language schools continued to follow the Soviet curriculum, the history of the USSR and general history. Estonian history was not systematically addressed: a few topics based on the history of the USSR were taught simultaneously.[24] The concept and syllabi of history teaching adopted in 1989/90 were translated into Russian, and teachers were invited to implement it,[25] but there were no direct requirements to do so. Emphasis was place on the fact that everyone living in Estonia should, in addition to general history, know the history of the local people. Teaching of Estonia history was recommended for 35 lessons in 9th grade and 35 lessons in 10th grade. Estonian history was assessed with a special mark on the secondary school graduation certificate,[26] so it could not be ignored. Changes in 1989/90 included an increase in the number of lessons in for Estonian language learning in non-Estonian language schools. In 1990/91, 'Estonica' – Estonian history, culture, language, geography, and nature – began to be taught. In 1992/93, civic education was introduced. [27]

The mentality that dominated in Russian-language schools was generally empire-centric, based on the collective memory of the Soviet era that refused to acknowledge different interpretations of history. Russian-language school teachers' knowledge of Estonian history was virtually non-existent since they were educated in the universities of Soviet Russia (mainly St. Petersburg and Pskov Pedagogical Institute) where Estonian history was not taught. Those who did not know the Estonian language (the poor level of Estonian language skills in teachers in schools with Russian as the langue of instruction is still a problem) could not use literature and the press. Russian-language press remained Soviet-ideology oriented.

Russian-language school teachers were concerned about the decline in content of Russian and Soviet history in books and classes.[28] They relied on Russian instructions rather than searching for their own methods to teach Russian. They hoped a working group would be set up by Estonian and Russian

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[23] S. Õispuu (ed.), *Täiendused 1988. aastal ilmunud ajalooprogrammide juurde* [Supplements on history programmes published in 1988], Tallinn, Eesti NSV Riiklik Hariduskomitee, 1989, p. 27.

[24] S. Õispuu (ed.), Üldhariduskooli programmid. Ajalugu V–XII klassile [Programmes for compulsory school. History 5th-12th grades], Tallinn, 1990, p. 10.

[25] *Programmy obchceobrazovatelnyh shkol. Istoria. Project* [Programmes for compulsory school. History. Project/Draft], Tallinn, 1990, pp. 3-56.

[26] *Istoria Estonii, grazhdanovedenie, chelovek i obchcestvo. Programma dlya obchcobrazovatelnyh shkol s russkim yazykom obucheniya, proftehuchilictch i tehnikumov* [History, civics, person and society. Programmes for compulsory schools, vocational and technical schools working in Russian language], Tallinn, 1990, p. 3.

[27] N. Lapikova, 'Venekeelsest haridusest Eestis' [On education in the Russian-language in Estonia], *Haridus* [Education], no. 2, 1998, pp. 9-10.

[28] Ü. Tikk, 'Ajaloo õpetamisest riigieksami künnisel' [Teaching history at the dawn of state exam], Õpetajate Leht [Teachers' Newspaper], 15 May 1998.

historians who would debate the events of the 20th century in particular and write a common history textbook.[29]

Conflict in historical memory of Soviet-era knowledge had to be reassessed. One teacher recalled: "And then there were a lot of people who remembered how it really was, but we taught the way the state needed it. Of course, I spoke about how in the village in 1948 people went to a collective farm, they joined themselves, and how bad the kulaks were and that it was the right decision to send them off ... One parent … asked [the teacher] after a lesson – do you really know what you are talking about? I began to suspect – the book is not the source of the truth..." Many teachers recognised that they believed the official history, or at least were under its influence, but now current knowledge was reversed. For some, the reappraisal of history was a shock, and there where cases when reverted ideas were not believed. Some teachers were not ashamed of their lack of knowledge: "So I learned with the students, no shame."[30]

The goals of history studies were formulated in the curriculum through knowledge, skills, and attitudes.[31] The goal was to move from the fact teaching to application of knowledge – to be able to make a personal judgment and to justify it and to be ready for independent assessment. Many of the principles formulated remain relevant and are included in the current state curriculum.

In 1991/92, transition to the new curriculum was completed and the underlying concept of history education was an improved and revised version of the previous concept.[32] Periods of history taught in different grades remained unchanged. An introductory course was added to the 5th grade for 70 classes per year.[33] There were three different program versions proposed for 5th grade from which the teacher could choose. Two versions were based on world history, and the third focused on Estonian history.[34] In the 6th grade, students learned about ancient history,[35] and the 7th grade learned about the Middle Ages.[36] In 8th grade, pupils learned the history of late medieval period up to

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[29] Ü. Tikk, 'Ajaloo õpetamisest riigieksami künnisel' [Teaching history at the dawn of state exam], Õpetajate Leht [Teachers' Newspaper], 15 May 1998.

[30] M. Oja, 'Muutused üldhariduskooli ajalooõpetuses alates 1987. aastast – nõukogulikust tänapäevaseks' [Changes in compulsory school history education since 1987 – from Soviet to present], PhD diss., Tallinn University, 2016, p. 312.

[31] J. Nurmik (ed.), 'Programmidest ja õppemetoodilisest kirjandusest 1989/90. Õppeaastal' [On programmes and methodological literature in 1989/90 academic year], EPAM [Archival Museum of Estonian Pedagogics at the University of Tallinn], R29296, p. 34; S. Õispuu (ed.), *Täiendused 1988. aastal ilmunud ajalooprogrammide juurde* [Supplements on history programmes published in 1988], Tallinn, Eesti NSV Riiklik Hariduskomitee, 1989, pp. 4-5; S. Õispuu (ed.), Üldhariduskooli programmid. Ajalugu V–XII klassile [Programmes for compulsory school. History 5th-12th grades], Tallinn, 1990, pp. 8-9.

[32] S. Õispuu (ed.), *Üldhariduskooli programmid. Ajalugu V–XII klass* [Programmes for compulsory school. History in 5th-12th grade], Tallinn, 1992, p. 2.

[33] Ibid., p. 11.

[34] Ibid., p. 19.

[35] Ibid., pp. 40-44.

[36] Ibid., pp. 44-49.

modern history.[37] The 9th grade studied the French Revolution and the period to the end of the 19th century.[38] In 10th grade, the period from the beginning of the 20th century until 1938 was taught.[39] In grade 11, the history of Estonia from the ancient times until 1991 was to be taught. A separate topic was emigration and life in exile.[40] Integration of Estonian history into large-scale blocks as part of global history was considered.[41] The 12th grade covered the period from the Second World War to the last quarter of the 20th century.[42]

The concept of history education focused on the question of why we need to learn history. The answer was the need to highlight identity formation, explain the present and possibilities of the future, develop thinking and communication skills,[43] present various interpretations of historical events, develop critical thinking skills, and, in particular, deepen the interest in history.[44] Teachers received explanations that instead of fixed assets (key facts), learning outcomes should look at the overall picture of the main stages of world history and develop the ability to discuss differing opinions and not just compile a list of events, dates, and names.[45] Teachers were encouraged to develop goals and themes based on general objectives.[46] Key concepts – democracy, imperialism, and human rights – were at the centre of history teaching/learning. Learning outcomes required an understanding of history, including knowledge of facts to support an opinion. It was suggested that studies should be associated with students' personal life experiences, familiar places, creative tasks, class trips and museum studies, making a family tree, writing memoirs, and discussing historical books and films. It was emphasised that the teacher should give fewer lectures and encourage students to express their own opinions.[47] The problem with renewal of the syllabus was that the periodisation used in teaching was still Soviet and also the fact that there was no justification for the choice of facts taught in history lessons. The process of renewal of history education indicated that we were still at the very beginning of a long and difficult road.

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[37] S. Õispuu (ed.)*, Üldhariduskooli programmid. Ajalugu V–XII klass* [Programmes for compulsory school. History in 5th-12th grade], Tallinn, 1992, pp. 50-55.

[38] Ibid., pp. 55-62.

[39] Ibid., pp. 62-66.

[40] Ibid., pp. 66-75.

[41] S. Õispuu (ed.), *Üldhariduskooli programmid. Ajalugu V–XII klassile* [Programmes for compulsory school. History in 5th-12th grade], Tallinn, 1990, pp. 96-97.

[42] S. Õispuu (ed.), Üldhariduskooli *programmid. Ajalugu V–XII klass* [Programmes for compulsory school. History in 5th-12th grade], Tallinn, 1992, pp. 75-80.

[43] Ibid., p. 5.

[44] Ibid., pp. 6-7.

[45] Õppeprogrammidest *ja õppe-metoodilisest kirjandusest 1992/93.* õ-a [On programmes and methodological literature in 1992/93], Tallinn, 1992, p. 56.

[46] Ibid., p. 57.

[47] S. Õispuu (ed.), *Üldhariduskooli programmid. Ajalugu V–XII klass* [Programmes for compulsory school. History in 5th-12th grade],Tallinn, 1992, pp. 19-22.

To be aware of the wider picture of history studies, teachers and programme developers studied the experience of other countries.[48] They discovered that a functioning structure and methodology could not be taken directly from elsewhere. Analysis revealed that history was being taught insufficiently and knowledge was poor. Estonia's advantage in the late 1980s and early 1990s was society's great interest in history.[49] The Swedish model appeared to embrace the concept of concentric teaching and higher generalisation levels, rather than continuing factual instruction about individual countries. For a society with a Soviet past in which the collective and not the individual was important, the issue of identity was essential, without becoming nationalistic:[50] studies should be centred on Estonian history, but the history of national minorities living in the country should also be considered.[51]

Personal experiences were also used in the development of the history curriculum. Silvia Õispuu, who was responsible of curriculum development in history at the Institute of Scientific Research of Pedagogy, recalled that she witnessed Western history lessons for the first time in Canada in 1989 while visiting relatives. Relatives and friends sent her textbooks and study programmes from Australia. Horizons opened through interaction with the International Society for History Didactics in 1991 and studies at the Danish Royal College as part of teacher in-service training, which introduced different programmes, literature, school culture, and study environments.[52] Thus, when designing innovations, foreign experience was assessed based on suitability for Estonian schools.

Development of the first history syllabi was a collective effort.[53] Transition to new study programmes that began in 1989 marked the dissolution of the Soviet

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[48] 'Tallinna Pedagoogilise Instituudi Pedagoogikauuringute Instituut. Ajaloo- ja kodanikuõpetuse kontseptsiooni lähtekohad. 1991. aasta teadusaruanne' [Pedagogical Research Institute of Tallinn Pedagogical Institute. Origins of the concept of history and civics. Scientific report of 1991], manuscript, EPAM [Tallinn University Estonian Pedagogical Archives and Museum], K44268, pp. 1-3.

[49] H. Piirimäe. 'Ajalooõpetus ja ühiskond I. Diskussioone ja arutlusi (eriti Põhjamaades)' [History teaching and Society I. Debates and discussions (especially in the Nordic countries)], *Haridus* [Education], no. 2, 1992, p. 6; H. Piirimäe, 'Ajalooõpetus ja ühiskond II. Diskussioone ja arutlusi (eriti Põhjamaades) [History teaching and Society II. Debates and discussions (especially in the Nordic countries)], *Haridus* [Education], no. 3, 1992, pp. 10, 13.

[50] 'Tallinna Pedagoogilise Instituudi Pedagoogikauuringute Instituut. Ajaloo- ja kodanikuõpetuse kontseptsiooni lähtekohad. 1991. aasta teadusaruanne [Pedagogical Research Institute of Tallinn Pedagogical Institute. Origins of the concept of history and civics. 1991, scientific report], manuscript, EPAM [Archival Museum of Estonian Pedagogics at the University of Tallinn], K44268, pp. 44-49, 81-97.

[51] S. Õispuu. 'Veel ajalooõpetuse kontseptsioonist' [More about the history teaching concept], *Haridus* [Education], no. 4, 1992, pp. 14-17.

[52] Silvia Õispuu, interview by Mare Oja, 11 October 2015, Personal archives of Mare Oja.

[53] 'Tallinna Pedagoogilise Instituudi Pedagoogikauuringute Instituut. Ajaloo – ja kodanikuõpetuse kontseptsiooni lähtekohad. 1991. aasta teadusaruanne' [Pedagogical Research Institute of Tallinn Pedagogical Institute. Origins of the concept of history and civics. Scientific report, 1991], manuscript, EPAM [Archival Museum of Estonian Pedagogics at the University of Tallinn], K44268, pp. 5-6; S. Õispuu (ed.), *Üldhariduskooli programmid. Ajalugu V–XII klass* [Programmes for compulsory school. History in 5th-12th grade], Tallinn, 1990, p. 3.

era and attempts to overcome the Soviet "approach." By 1992, a new program had been implemented in all grades. The history of Estonia took a leading position, reversing the position of the history of the Soviet Union. Attention was focused on political history, although cultural history was also studied. The main concept and principles clearly stated that understanding cause and consequences, development of the "big picture," and learning acquisition of skills was more important. However, the subject syllabus continued to be a rather detailed description of study topics, as it was in the Soviet era. This was needed at that time because teachers worked without books and other teaching aids. However, these changes covered only schools with Estonian as the language of instruction. Russian-language schools continued to teach history teaching/learning on the basis of Soviet textbooks. The Estonian education system was finally united with its first national curriculum in 1996.

National curriculums of 1996 and 2002

The first national curriculum was adopted in September 1996.[54] The curriculum was prepared by working groups at the State Education Board's General Education Department. Both academic historians and history teachers took part in history curriculum design. This ended the great freedom of the transition period, which a number of teachers appreciated, but others considered disorder. According the national curriculum, teachers had to achieve the learning outcomes set out in the curriculum, but they had the freedom to decide which topics to study in depth and in which topics to overview in general. A solid step towards harmonizing history studies was taken, but changing teaching practice was a long-term process.

Three years of work preceded the adoption of the curriculum. Fundamental principles were developed by researchers of the Institute of Scientific Research in Pedagogy: general principles in 1986 and development of the history curriculum in 1991, approved by the Ministry of Culture and Education in January 1994. Based on this, a working version of the curriculum was prepared and published in six booklets. Discussion of the working version resulted in a curriculum option, a project that was published in 1995 for feedback from schools.[55]

The structure of the history syllabus was concentric. This meant that elementary school pupils studied the history of the world, especially Europe and Estonia, from ancient history to the present day; in secondary schools

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[54] 'Eesti põhi- ja keskhariduse riikliku õppekava kinnitamine. Eesti põhi- ja keskhariduse riiklik õppekava. Vabariigi Valitsuse määrus nr. 228, 06.09.1996.' [Approval of the national curriculum for basic and secondary education in Estonia. National Curriculum for Basic and Secondary Education in Estonia. Regulation of Government of the Republic Regulation no. 228, 06.09.1996.], *RT I, 1996, 65* [The Parliament Acts I, 1996, no. 65], p. 1201. Available: https://www.riigiteataja.ee/akt/162998 (accessed 02.05.2020).

[55] *Pöördumine lugeja poole. Põhikooli ja gümnaasiumi õppekava. Projekt* [Refer to the reader. Basic and high school curriculum. The project/draft], Tallinn, 1995.

there was a second round of history studies, but with a different emphasis. An independent Estonian history course included the history of the Baltic Sea countries from ancient times to the end of the 19th century. Estonian 20th century history was part of the modern history course. World history from ancient times to the beginning of the 20th century was built on individuals, society, and culture. The concept was developed by University of Tartu professor Helmut Piirimäe, who had already proposed the idea of a world history course in 1992 that would consist of cultural history, including the history of ideas and daily life, describing how people lived, dressed, and behaved.

Chronological events and political, economic, social, cultural ideas were presented in history education, none of which were given preferential treatment. One of the main requirements of the curriculum, pupil development, was followed by problem-oriented teaching in which pupils should draw conclusions on the basis of sources[56] and express and justify their opinions. In order to shape the concept of historical time, it was suggested that chronological events be introduced thematically by giving characteristic examples from various regions of the world.[57] Focusing on development of skills took time; therefore, it was not possible to cover all the topics in depth. The use of exemplars was first introduced in 1990/1991.

The task of history teaching was to develop the understanding that without knowledge of the past, it is difficult to understand the course of modern events as well as many issues in Estonian history. The purpose of working with historical sources was to learn about cause and effect, notice similarities and differences, and recognise change and continuity. The development of empathy, the ability to see the world from a different point of view, was important as was being able to introduce various concepts of history without imposition of personal views. In order to understand that the writing of history depended on context and historians' interpretations of sources, comparison of the interpretation of historical events and phenomena was suggested for textbooks and other publications. It was hoped that learning history would help shape the learner's understanding of past experiences.[58] The principles, including the requirement for multiple perspectives in history studies, clearly indicated that history education did not seek to formulate a firm, official national position, but develop critical thinking skills in the learner.

The primary goals in basic education history studies[59] were to give the pupil the opportunity to become interested in history. The key objectives were "to learn, to interpret, to understand". The word 'understand' has been used as a requirement for the relationship between causation and contemporary

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[56] 'Eesti põhi- ja keskhariduse riiklik õppekava' [National Curriculum for Basic and Secondary Education in Estonia], *RT I 27.09.1996, no. 6–69, 1960* [The Parliament Acts I, no. 6–69, 1960, 27.09.1996], p. 2087. Available: https://www.riigiteataja.ee/akt/162998 (accessed 02.05.2020).

[57] Ibid., p. 2088.

[58] Ibid.

[59] Ibid.

events. Goals for gymnasiums[60] were more ambitious: pupils should be able to interpret, analyse, find evidence, and understand problems. Basic school learning outcomes presupposed that students "knew the major periods of world history and the developmental stages of Estonian society, worked with maps and historical sources, elaborated in brief essays, analysed causal relationships, and justified their positions."[61] The syllabus did not describe how to evaluate learning outcomes or which criteria to use. The study-process section included descriptions of appropriate teaching methods. Assessment guidelines highlighted objectives to be addressed, examples of forms of control, and explanations of how to support learning through evaluation of the development of the learner's self-esteem. Assessment was to be based on learning outcomes.

The history syllabus of the 1996 National Curriculum summarised the development of history teaching to date. The changes were significant compared to Soviet teaching traditions – the open curriculum was implemented. Many teachers were not ready for a learner-centred approach and making decisions on which topics to study in depth. Some support was provided at meetings where teachers were guided on how to interpret the syllabus. A teachers' guidebook was also published, which included methodological advice and examples on how to follow the syllabus.[62] Freedom in teaching history during the transitional period was used in various ways by teachers. Some teachers created their own teaching material and enjoyed the freedom to focus on topics that were of interest to them. After adoption of the national curriculum, they had to follow the guidelines and were rather disturbed by this. Most people, however, were delighted that the frame of history teaching was restored.[63]

The 2002 national curriculum was implemented on 1 September.[64] The 1996 Curriculum was supplemented with changes based on feedback from teachers. The work group, subject council, and groups of experts prepared an updated version of the history syllabus, which was not substantial: they included changes and improvements that were proved necessary on the basis of three years of teaching experience.

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[60] Eesti põhi- ja keskhariduse riiklik õppekava' [National Curriculum for Basic and Secondary Education in Estonia], *RT I 27.09.1996, no. 6–69, 1960* [The Parliament Acts I, no. 6–69, 1960, 27.09.1996], p. 2091.

[61] Ibid.

[62] *Ajaloo aineraamat* [History guidebook], Tallinn, 1997; M. Oja, 'Muutused üldhariduskooli ajalooõpetuses alates 1987. aastast – nõukogulikust tänapäevaseks' [Changes in compulsory school history education since 1987 – from Soviet to present], PhD diss., Tallinn University, 2016, p. 208.

[63] M. Oja, 'Muutused üldhariduskooli ajalooõpetuses alates 1987. aastast – nõukogulikust täna-päevaseks' [Changes in compulsory school history education since 1987 – from Soviet to present], PhD diss., Tallinn University, 2016, p. 320.

[64] 'Põhikooli ja gümnaasiumi riiklik õppekava. Vabariigi Valituse määrus nr. 56' [National Curriculum for basic and high school. Government of the Republic Regulation no. 56], *RT I, no. 20, 25.01.2002* [The Parliament Acts I, no. 20, 01.09.2002], p. 116. Available: https://www.riigiteataja.ee/akt/174787 (accessed 02.05.2020).

There were no major changes in the 2002 Curriculum. The number of classes in elementary school level subjects remained the same. The 1996 Curriculum allowed schools to decide how many lessons per week a particular subject was taught, e.g. in 5th grade, history could be taught 1-2 times a week. The 2002 Curriculum fixed the number of lessons in each grade.[65] The 1996 secondary school curriculum included eight compulsory courses, but the 2002 Curriculum had seven courses.[66] Teachers could decide in which order they taught courses.[67] This led to the need to reduce the amount of mandatory topics. For example, Estonian history gave up the history of Baltic Sea countries and focused solely on Estonian history. Modern history decreased from three to two courses. This change allowed gymnasium-level grades to decide which subjects or courses to add to the school curriculum. The total number of compulsory courses in gymnasium did not change. Thus, schools could also decide to teach more than the seven compulsory courses of history.

Assessment guidance was added to the syllabus. It assumed that "methods to control learning outcomes were varied, including verbal and written interviews; work with maps, source material, and pictures; long-term projects; research papers; and writing essays. Additionally, skills development was also assessed."[68] In project and independent research evaluation, it was considered important to monitor the process, not just the final result. Aspects of evaluation of discussion were described. In total, "the summary grade should be formed from the assessment of various skills" (self-expression and analysis, reproduction of material, essay writing, work with source material, etc.).[69] Such a requirement emphasised the design of skills in learning.

In the 5th grade, it was advised to understand that "history is really about everyone's story" or one's own biography.[70] The main aim was to develop interest towards history. In 6th grade, suggested teaching methods included asking questions, planning, storytelling, problem-solving, and simple analysis.[71] In grades 7 through 9, class trips to museums or archives to encourage student research interests were encouraged.[72] At the gymnasium level, concentration on the creation of connections and conclusions, formation and justification personal opinions and attitudes, and seeking and critical assessment of information was recommended.[73]

In comparison to the 1996 curriculum, the 2002 version aggregated and generalised learning outcomes, reducing the demand for learning outcomes

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[65] Põhikooli ja gümnaasiumi riiklik õppekava. Vabariigi Valituse määrus nr. 56' [National Curriculum for basic and high school. Government of the Republic Regulation no. 56], *RT I, no. 20, 25.01.2002* [The Parliament Acts I, no. 20, 01.09.2002], p. 878.

[66] Ibid., p. 881.

[67] Ibid., p. 1016.

[68] Ibid., pp. 1011-1012.

[69] Ibid.

[70] Ibid., p. 1012.

[71] Ibid., p. 1013.

[72] Ibid., p. 1014.

[73] Ibid., p. 1017.

at the basic school level. The 2002 Curriculum added secondary school study objectives: pupils should "learn to participate in discussion, argue in a reasoned way, and use and analyse various sources purposefully and critically."[74]

In conclusion, the changes in the 2002 Curriculum were neither fundamental nor great. History teachers liked stability. Teachers were encouraged to follow the changed curriculum by using a methodological study guide.[75]

Coordination between the Center for Educational Studies and the University of Tartu Curriculum Development[76] from 2000 to 2005 in the subject group 'Human and Society' sought to find the significance of history as a subject in the overall field of general education. More attention was turned to the development of student skills and creation of connections between topics. The main goal of history teaching was to develop critical thinking skills in learners.[77]

Forms of education and methodology in history studies

Changes in teaching practice occurred more slowly than changes in curriculum. Soviet history teaching was knowledge-centred and laden with ideology, but even then, progressive teachers tried to support development of understanding of history, in particular through research of pupils' neighborhoods that began in the latter half of the 1950s. In the 1980s, the movement involved half of the schools in Estonia. At the end of the 1980s, the Heritage Society initiated a research movement to gathered memories on forbidden topics in Estonian history. This kind of research enabled students to recognise the nature and traditions of their ancestors through time. This would make them think about the kind of traces they would like to leave behind. The tradition of student research continued with the international history research competition, which continues to this day.[78] Since 2001, the contest is part of the EUSTORY informal network for the study of European students' historical research in which 24 European countries participate. The aim of the competition is to deepen young people's historical interest and develop their independent research skills.

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[74] Põhikooli ja gümnaasiumi riiklik õppekava. Vabariigi Valituse määrus nr. 56' [National Curriculum for basic and high school. Government of the Republic Regulation no. 56], *RT I, no. 20, 25.01.2002* [The Parliament Acts I, no. 20, 01.09.2002], p. 1016.

[75] M. Oja, 'Ajalugu uuendatud õppekavas' [History in the updated curriculum], in *Ajaloo õpetamisest. Abiks õpetajale* [Teaching history. Support for the teacher], Tallinn, 2002, pp. 5-22.

[76] About the Centre, see: 'Center for Educational Studies.' Available: http://www.curriculum.ut.ee/ et/keskusest (accessed 23.02.2015).

[77] K. Kello, Ü. Luisk, 'Vähe levinud vaateviisist ajalooõpetusele – riikliku õppekava perspektiivist' [A less common view of history studies – from a national curriculum perspective], Õpetajate Lehe lisaleht [Teachers' Newspaper's Appendix], 18 February 2005, p. 4.

[78] T. Ojala, V. Rohtla, '14 aastat õpilaste ajalooalaste uurimistööde võistlusi' [14 years student historical research competitions], in *Kakskümmend aastat Eesti Ajaloo- ja Ühiskonnaõpetajate Seltsi* [Twenty years of the Estonian Society of History and Civic teachers], Tallinn, 2014, p. 9.

Students compete with the research completed during the year.[79] The tradition of the contest strongly supports the principles of the curriculum, and Estonian students have participated in the competition since 1999.

Through the History Olympiad, students were motivated to study history and read history books. The development of subject Olympiads was influenced by general changes in education in the context of political transitions. The 1990 Olympiad was postponed, and the 1991 Olympiad differed from previous competitions. The topic was 'Republic of Estonia, 1918–1940.'[80] The competition was in three parts: students' own creations, library work on literature about a specific topic, and testing foreign language skills.[81] The goal was not to compete but rather to offer opportunities for action and self-expression.[82] However, it returned to the former Olympiad format in which student knowledge was mainly tested, because no better solution was found. Organization of the Olympiad showed what was valued and considered important. In 2000, the obligation to organise the Olympiad transferred to the Estonian History Teachers' Society under an agreement with the Ministry of Education.[83]

Schools have often called on experts to share their knowledge. In schools, archaeology, ethnography, Estonian cultural history, archival studies, history of the Nordics and Baltic German, and other in-depth topics were taught as optional courses. In 1987, when intensive teaching of Estonian history began at Tallinn Secondary School No. 32 in a special class, cooperation with researchers from the Institute of History, the Estonian History Museum, the Estonian State Archives, and the Tallinn City Archives began, and special courses for schools were developed. Students in specialised history-classes had more solid views, compared to their peers, about the global processes taking place in society, politics, and economics.[84]

Class trips were also evaluated as methods for better understanding the past. Students researched local history and created presentations, which they also presented outside the classroom. The most famous were trips were to museums and archives.

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[79] T. Ojala, V. Rohtla, '14 aastat õpilaste ajalooalaste uurimistööde võistlusi' [14 years student historical research competitions], in *Kakskümmend aastat Eesti Ajaloo- ja Ühiskonnaõpetajate Seltsi* [Twenty years of the Estonian Society of History and Civic teachers], Tallinn, 2014, p. 9.

[80] S. Valdmaa, 'Ajaloo-olümpiaad uut moodi' [History Olympiad in a new way], Õpetajate *Leht* [Teachers' Newspaper], 24 October 1990, p. 7; A. Liim, 'Ajaloo olümpiaadidest ajaloopäevadeni' [From History Olympiads to History Days], *Kleio,* no. 7, 1993, pp. 58-59.

[81] F. Kupp, 'Ikka pole veel uusi õpikuid' [Not yet new textbooks], Õpetajate Leht [Teachers' Newspaper], 3 November 1990, p. 6.

[82] S. Valdmaa, 'Ajaloo-olümpiaad uut moodi' [History Olympiad in a new way], Õpetajate *Leht* [Teachers' Newspaper], 24 October 1990, p. 7.

[83] 'Haridusministeeriumi ja Eesti Ajalooõpetajate Seltsi koostööleping. HTM 10-10/940' [Co-operation agreement between the Ministry of Education and the Estonian History Teachers' Association. Ministry of Education and Science act no. 10-10/940], Tartu 20.09.2001, Archives of the History and Civic Teachers´ Association.

[84] N. Klitsner, 'Kümme aastat ajalooklassi' [Ten years of specialised history classes], *Haridus* [Education], no. 3, 1996, pp. 52-53.

Computer technology was used increasingly in history teaching. The first school computerization project was implemented in 1987–1992. From 1992–1996, IT resources were distributed to schools, and search and publication of suitable software for Estonian study programmes began as well as creation of original software. The *Tiger Leap* Program (1997–2000) was created in order to modernise the ICT infrastructure of schools.[85] In 2002/2003, the online platform, *Miksike*, for tests was created. Teaching changed as a result: the teacher could choose course materials and, if necessary, process them.[86] Learning became more and more creation of information, not just consumption of information. Students formulated their findings as a workbook or portfolio. However, a large part of the teaching staff needed samples and instructions to change the teaching-learning process.[87]

There was no general national study on the situation of history education. Conclusions could be drawn from the implementation of the syllabus, the use of study materials, and study activities obtained from history teacher questionnaires sent to schools in 2004. Teachers said there was not enough time for history and civics. More time was needed to develop thinking, analysis, and argumentation skills. Secondary school outcomes were achieved, especially analysis of mass media. Critical analysis of historical sources from various points of view and the development of empathy were mentioned as more difficult to achieve. Estonian history was easier for students to learn than general history. Teachers complained about the lack of access to the Internet to find additional learning materials. Not all history classrooms had the necessary computers and data-projectors. Use of computer classes took a long time to register. Among the respondents, the most popular method of teaching was the lecture, which the teachers considered effective. Independent work and discussion followed. Less use was made of project work, class trips, and research. In the survey section on goals of learning history, teachers considered critical thinking, analysis, and reflection to be the most important skills. The most influential factors for teaching was the interest of students, the history syllabus, and the national examination; to a lesser extent, textbooks were mentioned.[88] Students mentioned the importance of learning history facts more often than

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[85] *Riiklike hariduspoliitikate ülevaated, Eesti* [Review of national policies for education, Estonia], OECD, 2001, pp. 17, 24, 97-100.

[86] S. Tohver, '*Online* kontrolltöö teeb õpetaja elu lihtsamaks' [*Online* test makes life easier for a teacher], Õpetajate Leht [Teachers' Newspaper], 31 May 2002, p. 5.

[87] From August to November 1987, teachers from general education schools, including history teachers, were surveyed to get an overview of the extra-curricular forms or additional material they had used. See S. Reinpalu, A. Ruubel, 'Õpetaja valmisolek avatud õppeks' [Teacher's readiness for open learning], *Nõukogude Kool* [Soviet School], no. 10, 1988, pp. 30-32.

[88] M. Oja, 'Mõnda ajalooõpetajate küsitlusest' [Some thoughts on history teachers survey], Õpetajate Lehe lisaleht [Teachers' Newspaper's Appendix], 18 February 2005, p. 9; 'Ajalooõpetajate küsitlus' [History teachers survey]. Available: http://www.ekk.edu.ee/vvfiles/0/ajalooopetajate_kysimustik.pdf (accessed 23.02.2015).

teachers.[89] A second survey in 2004 showed that history was considered to be the seventh most popular subject among more than 15 subjects.[90] Surveys showed that in ten years, the content of history teaching had changed more than teaching practices.

The Estonian History Teachers' Association, founded in 1993, had a great influence on history teaching. The same year, membership in the European History Teachers' Association EUROCLIO was also obtained. Independent initiatives were organised and the Society has been partnering with the Ministry of Education on various issues, including discussion about assessment, curriculum development, and textbooks analysis. The presence of Society members as experts in the Attestation Committee, subject councils, discussions of education policy gave teachers confidence that their opinions on the actual situation and their position were taken into account. Society membership provided teachers with a wider range of contacts with colleagues at home and abroad. Association activities supported the development of teachers and broadened their general and professional horizons.

National Examination as an influence on history teaching

The adoption of the first national curriculum was followed by completion of an external evaluation system. The first state exam in history took place in 1997. This was preceded by a nationwide test.[91] The introduction of the exam accelerated the transition to study activities recommended in the 1996 National Curriculum – work with historical sources and maps and the development of discussion and analysis skills. State examinations in history took place annually until 2013.

The national examination in history was scored with 100 points – divided equally into 25 points each – for discussion, history of Estonia, general history, and the course 'Human-society-culture.' Tasks focused on curriculum learning outcomes and were skills-centred and of varying degrees of difficulty.

The examinations were prepared by a commission composed of recognised teachers (including from Russian-language schools) and university representatives. The tasks were discussed jointly and amended at various meetings, and test questions were answered by an independent expert (teacher and

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[89] E. Tannberg, 'Õpilase küsitlusest 2004. aasta ajaloo riigieksamil' [Students' survey on the history state exam in 2004], Õpetajate Lehe lisaleht [Teachers' Newspaper's Appendix], 18 February 2005, p. 9.

[90] L. Pallas, 'Kooli õpikeskkond ja õpilaste toimetulek. Ankeet õpilasele. Tabelid' [School as learning environment and students' coping. Student survey. Tables.], in E-S. Sarv, Õpetaja *ja kool õpilase arengu toetajana. Õpetaja enesest ja koolist. CD Statistilised lisad* [Teacher and school as supporters of student development. Teacher on her/himself and on school. CD Statistical appendix], Tallinn, Tallinna Ülikool, 2008, p. 49.

[91] M. Oja, 'Riigieksamid meil ja mujal' [State exams here and away], *Haridus* [Education], no. 11-12, 2006, p. 28.

academic historian), edited, printed, and delivered to schools. An assessment guide was also prepared. The examination was anonymously assessed by the Commission. Since 2001, different parts of the test have been evaluated by different assessment teams. The essay was marked by two evaluators; evaluators could not see each others' comments and marks. The student received the average mark of both evaluators. Upon completion of the evaluation, the Commission convened to summarise, analyse student mistakes and responses, and make other observations, including unsuccessful wording of exam questions. Each year, substantive and statistical analyses of the exam were compiled and published. Those who were not satisfied with their grade could appeal the results.[92] The Board of Appeal evaluated the work as a whole and changed the mark if warranted.

The results of the exams provided important information about student achievements. Every year, work with maps and sources and reflection skills improved. Yet, students displayed superficial knowledge of history, making mistakes because of superficial reading of the question, poor understanding of instructions, and struggles with the wording of the answers. Responses were generally superficial, emotional, and unsubstantiated. It was felt that the level of general literacy had declined.[93] Statistics were poorly understood, and propaganda was not distinguished from scientific facts. The past was better known than recent history, and there was a stereotypical attitude towards the Soviet era.[94]

State exams drew immediate public attention. The development of learning skills was positive, but the ranking of schools by the media was negative. Objective feedback from exam results provided information on achievement of learning outcomes and the quality of education. Teacher pedagogical skills have

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[92] L. Reimann, 'Riigieksami tulemusi võib apellatsiooni korras vaidlustada' [The results of a state exam can be challenged by appeal], Õpetajate Leht [Teachers' Newspaper], 6 June 1997, p. 1.

[93] A. Adamson, *Ajaloo riigieksami analüüs 2007* [Analysis of history state exam 2007], 2007. Available: http://vana.ekk.edu.ee/statistika/analyys/23_AjaluguG.pdf (accessed 19.03.2015); R. Tõnnis, *Ajaloo riigieksam 2012. Tulemuste analüüs* [History state exam 2012. Analysis of results], 2013. Available: http://www.innove.ee/UserFiles/Riigieksamid/2013/Ajaloo%20 re%20lyhianalyys%202012.pdf (accessed 10.03.2015); M. Oja, M. Räis, E. Tannberg, *Ajalugu. Riigieksam 2002. Riigieksam 2003* [History. State exam 2002. State exam 2003], Tallinn, 2002, p. 56; E. Tannberg, 'Ajaloo riigieksam mullu ja tänavu' [History state exam last year and this year], Õpetajate Lehe lisaleht [Teachers' Newspaper's Appendix], 13 February 2004, p. 1; A. Adamson, *Ajaloo riigieksami analüüs 2007* [Analysis of history state exam 2007], 2007. Available: http://vana.ekk.edu.ee/statistika/analyys/23_AjaluguG.pdf (accessed 19.03.2015).

[94] A. Adamson, Ü. Kõiv, M. Oja, M. Räis, E. Värä, *Eksaminandile ajaloo riigieksamist* [About history state exam to student], Tallinn, Argo, 2002, pp. 43-56; M. Oja, M. Räis, E. Tannberg, *Ajalugu. Riigieksam 2002. Riigieksam 2003* [History. State exam 2002. State exam 2003], Tallinn, 2002, p. 56; E. Tannberg, 'Ajaloo riigieksam mullu ja tänavu' [History state exam last year and this year], Õpetajate Lehe lisaleht [Teachers' Newspaper's Appendix], 13 February 2004, p. 1; A. Adamson, *Ajaloo riigieksami analüüs 2007* [Analysis of history state exam 2007], 2007. Available: http://vana.ekk.edu.ee/statistika/analyys/23_AjaluguG.pdf (accessed 19.03.2015).

been developed in the process of compilation and evaluation of examinations.[95] In spite of the complexity of designing and evaluating skills of discussion and of thinking, the teachers considered the state exam to be most effective for changing teaching from fact-based knowledge towards skills development.[96] Almost the same could be said about final exams in basic schools.

Students' achievements in history were tested at the end of grade 6 by a nationwide test first implemented in 2002. The suitability of the test itself was judged by members of the subject council,[97] and results were assessed by history teachers. Each form of external evaluation provided feedback to state officials on the quality of education and subject teaching.

Upgrading teaching literature

Teachers were often guided by textbooks when planning the course rather than curriculum guidelines, so the textbook was very important in changing the learning process. Content, research methodology, assessment, and methodology were taken from textbooks, which made it possible to change teaching quickly and all over the country through textbooks.

Until new textbooks arrived in schools, articles from newspapers and magazines were mainly used to teach history. Historical literature was non-existent or unavailable. The *Teacher Newspaper* had systematically published thematic articles that were not always up-to-date.[98] Laine Levald, employee of the Ministry of Education, put together thematic lists of articles on historical issues from the press, which were sent to schools as a guide for teachers to facilitate finding suitable material.

History books from 1989–1994. During this period, the first textbooks corresponding to renewed history teaching concepts appeared. The first were Estonian history teaching materials. In total, 12 textbooks appeared – six Estonian history and six general history textbooks. The main innovation was replacing Soviet history with the development of an independent course in Estonian history.

The first textbook *The History of Estonia* was published by 18 authors in 1989: its purpose was to present historical facts missing from Soviet era textbooks.[99]

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[95] M. Somelar, 'Riigieksamid – Eesti hariduse oluline väärtus' [State exams – important value of Estonian education], Õpetajate Leht [Teachers' Newspaper], 13 September 2013, p. 4.

[96] M. Oja, 'Muutused üldhariduskooli ajalooõpetuses alates 1987. aastast – nõukogulikust tänapäevaseks' [Changes in compulsory school history education since 1987 – from Soviet to present], PhD diss., Tallinn University, 2016, p. 326.

[97] 'Ajaloo ainenõukogu koosoleku protokoll 14.11.2003. Ainenõukogude protokollid 2001–2003' [The report of the meeting of the council of history 14.11.2003. Reports of subject councils 2001–2003], in *Riiklik Eksami- ja Kvalifikatsioonikeskus sari* [State Center for Examination and Qualification series], vol. 3-12, 2003.

[98] K. Siilivask, 'Lisamaterjale Eesti ajaloo õpetamiseks keskkoolis' [Additional material for teaching Estonian history in high school], *Õpetajate Leht* [Teachers' Newspaper], 14 January1989, p. 3.

[99] S. Õispuu, 'Eesti ajaloo õppevahend keskkoolile' [Estonian history teaching tool for high school students], Õpetajate Leht [Teachers' Newspaper], 30 September 1989, p. 4.

The book resembled a teacher's handbook and did not have a methodological component, maps, explanations of historical terms, or illustrations for students. It was the first textbook to include information about the Molotov-Ribbentrop Pact and call Red Army troops occupiers. However, World War II was still called the 'Great Patriotic War'[100] in the Soviet tradition.

History textbooks from 1995–2001. The new textbooks passed testing in schools; teacher feedback was taken into account in subsequent editions. Publisher experience increased and technical facilities improved.

Part I of the textbook *Humans, Society, Culture* was published in 1998, part II in 2000, and part III in 2001.[101] At the 15 September 1998 meeting of the National History Subject, the members of history decided to ask the Ministry of Education to temporarily suspend application of the curriculum in grade 11 until the textbook reached schools.[102] The course 'Humans, Society, Culture' was developed and included in the 1996 National Curriculum: teachers could not rely on previous teaching materials.

During this period, 11 books were published, two of which were in Estonian history, and seven in general history as well atlases for basic schools[103] and gymnasiums.[104] Each of the schools was given an atlas of historical maps.[105] The use of maps was essential as regional maps in textbooks could not replace world maps.

History books from 2002–2004. Six textbooks were published, two of which were on Estonian history and four on general history. There were also four different supplementary materials printed, such as collections of tests and exams, contour maps, and workbooks. Textbooks and their corresponding workbooks formed a set of learning materials.

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[100] S. Õispuu (ed), *Eesti ajalugu. II osa. 19. sajandi* lõpust kuni tänapäevani [Estonian history. Part II. From the end of the 19th century to the present], Tallinn, Valgus, 1989, pp. 3, 86-87, 89, 118, 141.

[101] M. Kõiv, A. Mäesalu, K. Piirimäe, M. Tänava, 'Inimene, ühiskond, kultuur. I. Vana-Idamaad, Vana-Kreeka ja Vana-Rooma' [Person, society, culture. I. Old East, Ancient Greece and Old Roman.], in H. Piirimäe (ed.), *XI klassi ajalooõpik* [9th grade history textbook], Tallinn, Koolibri, 1998; T. Aleksejev, et al., 'Inimene, ühiskond, kultuur. II. Keskaeg ja varauusaeg' [Person, society, culture. II. The Middle Ages and the early modern period], in H. Piirimäe (ed.), *XI klassi ajalooõpik* [11th grade history textbook], Tallinn, Koolibri, 2000; K. Hiiemaa, O.-M. Klaassen, H. Piirimäe, K. Piirimäe, T. Tannberg, 'Inimene, ühiskond, kultuur. III. Uusaeg' [Person, society, culture. III. The modern period], in H. Piirimäe (ed.), *XII klassi ajalooõpik* [12th grade history textbook], Tallinn, Koolibri, 2001.

[102] I. Piir, 'Eesti Ajalooõpetajate Selts pidas aastakoosoleku' [The Estonian History Teachers' Association held its annual meeting], Õpetajate *Leht* [Teachers' Newspaper], 2 October 1998, p. 12; I. Piir, 'Ajaloo ainenõukogus' [In the Estonian History Subject Council], Õpetajate Leht [Teachers' Newspaper], 30 October 1998, p. 13; 'Ajaloo ainenõukogu pöördumine, Ainenõukogude protokollid 1997–2001, 23.09.1998, 22.11.1999' [History Subject Council's appeal. Protocols of Subject Councils 1997–2001, 23.09.1998, 22.11.1999], National State Center for Examination and Qualification, vol. 3-12.

[103] *Ajaloo atlas põhikoolile* [History Atlas for Basic School], Tartu, Tallinn, Regio, 2000.

[104] *Ajaloo atlas gümnaasiumile* [History Atlas for Secondary School], Tartu, Tallinn, Regio, 2000.

[105] H. Kinder, W. Hilgemann, *Maailma ajalugu esiajast tänapäevani* [World history from early days to today], Tallinn, Avita, 2001.

A special edition of the journal *Past*[106] was published about Estonian-Russian relations, as well as other materials supporting Russian-language schools. Minutes of the Subject Council meeting indicate that assessment of new literature was the reason for frequent meetings from 2000–2004.[107] Publication of textbooks was delayed, because the publisher did not get the manuscripts on time. Teachers had to manage on their own or use previously published textbooks.

To sum up, teaching materials became more diverse. Methodologically, textbooks became more meaningful. Textbook language was more age appropriate, the number of facts was reduced, illustrations were critically selected and more consistent with the text, and questions at the end of the chapter were more focused on learning outcomes that supported development of thinking skills. The authors were mainly academic scholars, and teachers created workbooks and additional study materials.

History teaching materials in Russian-language schools

The publishers did not get Russian translations of Estonian textbooks quickly. Thus, after the implementation of the 1996 National Curriculum, Russian-language schools received permission to use textbooks published in Russia: they accounted for 35% of all textbooks used in the second half of the 1990s.[108] Most textbooks were compiled in Estonian and translated into Russian. The text was not changed, but the translators attempted to make it more neutral when describing some events. Two textbooks – Estonian David Vseviov's *History* (1999) and Russian Andrei Fyodorov's *20th century history Part I and Part II* (2001–2002) – were first published in Russian and then translated into Estonian.[109] Both were based on the Estonian National Curriculum. The authors competed and were selected by the publisher. Fjodorov's textbook was well received in Russian-language schools. The publisher believed that Russian-language school teachers and pupils had greater trust in a Russian author about information that previously had been banned.[110] Lauri Vahtre's textbook

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[106] The journal 'Tuna' [Past] has been published since 1998 by the National Archives with the support of Estonian Cultural Endowment and in co-operation with Tallinn City Archives and the Association of Estonian Archivists.

[107] I. Piir, 'Ajaloo ainenõukogus' [In the Estonian History Subject Council], Õpetajate Leht [Teachers' Newspaper], 12 May 2000, p. 10.

[108] N. Lapikova, 'Venekeelsest haridusest Eestis' [On the education in Russian-language in Estonia], *Haridus* [Education], no. 2, 1998, p. 8.

[109] D. Vseviov, *Vzgljad v prošloje. Učebnik istorii dlja 5. klassa* [View into past. History textbook for grade 5th], Tallinn, 1999; A. Fedorov, *Istorija XX veka. Učebnik dlja gimnazij* [20th century history. Textbook for high school], Tallinn, 2001–2002.

[110] 'Kirjastuse Avita toimetaja Arvis Kiristaja vastus Marko Mihkelsoni retsensioonile Andrei Fjodorovi õpiku käsikirjale *Lähiajalugu*' [Publisher House 'Avita' editor's Arvis Kiristaja's answer Marko Mihkelson's review of the textbook manuscript *Recent history* by Andrei Fyodorov], in *Ainenõukogude protokollid 2001–2003* [Records of subject councils 2001–2003], vol. 3-12, State Center for Examination and Qualification.

on Estonian history (2004)[111] was specially designed for Russian-language schools for teaching history in Estonian. At the request of the Integration Foundation, a collection of historical sources, *Turning Points in Estonian History* (2008), was compiled for free distribution with additional materials for teachers and focused on Russia and Russians in Estonia.[112] It supplemented the comprehensive textbook and provided opportunities for in-depth study of topics. Various, often conflicting, views in the textbook allowed students and teachers to analyse and understand the circumstances surrounding the creation of various sources and to reveal manipulation of history. Teachers in Russian schools criticised the fragmentary treatment of Russian history and the former communist republics in textbooks translated from Estonian into Russian: they claimed the books did not provide a comprehensive worldview and conveyed a Eurocentric perspective on the interpretation of history.[113] The opposition claimed that the history textbooks were intended for Estonia's schools, regardless of the language of instruction. The volume of the textbooks was justified by the situation – students needed knowledge and differing views of Estonian and world history and to compare Soviet textbooks in which ideology and falsifications dominated.[114] According to some, Estonian history needed to show Estonia's deep roots in Western culture and that the Russians who came to Estonia entered a completely different world.[115]

Conclusion

Changes in history and education as a whole began after the Teachers' Congress in 1987. The abandonment of Soviet-era traditions and ideology was revolutionary. Teachers had to refresh their knowledge and to rethink their perceptions about history. The central task was to formulate focus and objectives of history teaching and balance historical knowledge with skills, values, and attitudes in the learning process. First, the 'blank pages' of Estonian history were restored. The history of independent Estonia (1918–1940) had previously been taught from a deeply ideologised perspective and several topics were not discussed such as the treaty between Estonia and Soviet Russia, which was the first *de jure* recognition of the young, independent Estonian state. Tragic historical events – the deportations and occupations – could

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[111] L. Vahtre, *Eesti ajalugu gümnaasiumile* [Estonian history for high school], Tallinn, 2004.

[112] T. Karjahärm, A. Adamson (eds.), *Eesti ajaloo pöördepunktid. Dokumente ja materjale vene õppekeelega gümnaasiumile* [Turning points in Estonian history. Documents and materials for Russian-language upper secondary schools], Tallinn, 2008; *Eesti ajaloo pöördepunktid. Lisamaterjale õpetajale* [Turning points in Estonian history. Additional material for the teacher], Tallinn, 2008.

[113] R. Grigorjan, 'Ajalugu koolis ja Eesti hariduspoliitika' [History in school and Estonian educational policy], Õpetajate Leht [Teachers' Newspaper], 9 February 1996.

[114] P. Leppik, 'Võltsingut ja ajalugu ei sobi võrrelda' [Counterfeiting and history are not suitable for comparison], Õpetajate Leht [Teachers' Newspaper], 16 February 1996.

[115] S. Tohver, 'Kodanikuõpetuse kaudu multikultuurilisse ühiskonda' [*Via* Civic education to/into a multicultural society], Õpetajate Leht [Teachers' Newspaper], 14 May 1999.

not be discussed. Initially, primary attention was development of the content of the history. The syllabus achieved several principles that are still relevant today such as the development of critical thinking skills. The 1996 Curriculum gave teachers a high degree of decision-making power and, simultaneously, the responsibility to interpret the curriculum. Teachers were not prepared for their intended choices and increased responsibilities. The 2002 Curriculum did not bring about major changes but gave teachers stability.

The curriculum gave a frame and direction, but the key issue for educational change was the teaching staff. Educational practices needed to be transformed, educational materials developed, and innovative technology and new teaching approaches implemented. The activities of the History Teachers' Association were based on teachers' professional needs, which increased the confidence of teachers. Membership of EUROCLIO provided an opportunity to participate in international debates on history education.

In conclusion, from 1987 to 2004, history teaching in Estonian schools evolved from a Soviet ideological and biased subject into modern history teaching in terms of subject matter, student development, and methodology. The whole paradigm of history teaching changed.

Changes in the Content of Music Education in Primary Schools

Rasa Jautakytė

Abstract. After the restoration of Lithuania's independence and the declaration of the Lithuanian school reform idea, a goal was set to restructure the Soviet content of education and make universal human values the foundation of the process of education, with due regard to principles of national identity, integration, differentiation, and creativity. This article focuses on the changes in teaching music in primary schools during education reform in Lithuania when two weekly lessons of music were introduced, two alternate syllabi were developed, and new textbooks were published. This study analyses the changes in the content and methodology of music education, based on fostering pupils' creative abilities and skills of artistic expression as well as on education of the individual as a cultured user of artistic values.

Keywords: music education, primary school, Lithuania

Introduction

The national school traditions cherished in the Republic of Lithuania were seriously undermined by the genocide carried out by the Soviet administration in the post-World War II years. After the majority of the most significant national and global cultural values were replaced by Soviet culture substitutes, the cultural foundation of Lithuanian schools also changed. School almost ceased to be a fosterer of national culture continuity and educator of national awareness and failed to resist the negative trends of authoritarianism. A shortage of alternative ideas and different systems of education instilled indifference to cultural and spiritual values.

During the Soviet era, the role of academic subjects in the humanities and arts diminished greatly. At school, only one music lesson per week remained, religious music was removed, and ideology was imposed on music. Education acquired a purely academic character oriented towards providing children with knowledge. Therefore, music was no longer taught as a subject of art, but more like the natural sciences with attention focused on the most important things such as knowledge, abilities, and skills. Academic subjects were taught in isolation from each other, and their content was not related to Lithuanian ethnic culture or the sociocultural context of a specific era.[1]

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[1] Ž. Jackūnas, 'Lietuvos mokykla sovietizacijos pinklėse' [Lithuanian school in the Sovietisation trap], *Lietuvos kultūros būklė* [The situation of Lithuanian culture], Vilnius, Standartų leidybos Vilniaus spaustuvė, 1990, pp. 109-110.

In 1990, as the Lithuanian independence restoration movement began and fundamental changes occurred in political life and socio-economic conditions, the need emerged to carry out education reform, to reconstruct the education of the young generation. The theoretical foundation of Lithuanian education reform was based on ideas of preservation and enhancement of national identity, fostering national cultural traditions and forming moral values. The importance of creating national identity was accentuated with the 'Law on Education' that indicated that education shall be based on humanistic, national, and global cultural values.[2]

The principal aim of "new era" education was "independent and creative individuals, who reveal their abilities as early as at school".[3] In Lithuanian education, school was meant to educate according to each pupil's intellectual capabilities, general and artistic competences, and culture, so that each pupil saw the process of learning as a meaningful and motivated activity. Pupils had to be active in lessons and interpret analysed material in the context of their own experience, interests, and sociocultural lives. An objective emerged: restructure the content of education and change the style of relations at school on the basis of democracy and humanism, eliminate autocratic communication, and build the process of education on common human values with due regard to principles of integration, differentiation, and national identity.

This study focuses on changes in the content and methodology of music education in primary schools in the context of education reform implemented after regaining independence.

Restructuring musical education in primary schools as part of education reform

Following the declaration of the new Lithuanian school concept, restructuring of arts education began immediately. Before education reform, schools cared mainly about artistic expression, but new requirements orientated the teaching of art subjects towards fostering pupils' creative abilities and the education of the individual as a cultured user of artistic values.[4] In 1994, the draft of the General Curricula was made public, and in 1996, the main document that regulated the content of education in comprehensive schools, the General Curricula, was published. It stated that "the most important aim of arts education was to develop pupils' creative, spiritual, and physical powers; to provide them with artistic and aesthetical competences and the fundamentals

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[2] *Lietuvos Respublikos švietimo įstatymas* [Law on Education of the Republic of Lithuania], Vilnius, Leidybos centras, *1991,* pp. 1.

[3] *Lietuvos švietimo koncepcija* [Lithuanian Education Concept], Vilnius, Leidybos centras, 1992, pp. 1.

[4] Ž. Jackūnas, 'Meninio ugdymo vieta integruoto mokymo sistemoje' [The place of artistic education in the integrated teaching system], in V. Matonis (ed.), Šiuolaikinės meninio ugdymo koncepcijos [Contemporary conceptions of artistic education], Vilnius, Enciklopedija, 2000, pp. 183-191.

of moral, social, cultural, and civic maturity; and to educate a sensitive, thinking, creative, and insightful perceiver and active user of art."[5] In the general curricula, a musical education syllabus for national schools was created, a totally different structure based on the traditions of global cultural heritage. Soviet ideology was abandoned, education of ethnic values was enhanced, and the content of education and methods were improved. At primary school, two weekly music lessons were introduced, even if they continued to be taught by non-specialists. Previously-used textbooks were not acceptable, and teachers had to manage without teaching aids for several years. From 1995 to 2000, two textbooks of music for primary school were published – *Lakštutė* [Nightingale] by Vida Krakauskaitė and *Muzika* [Music] by Eirimas Velička.

The first Education Standards that appeared along with the General Curricula was a new education regulations document. Most teachers considered the document an attempt to create centralised directives on what to do and how to do it and questioned its implementation and the probable additional workload for teachers. However, teachers soon recognised the advantages of the education standards, which became one of the main documents for organising musical education at school. Many music textbooks and teaching manuals appeared, making it easier for teachers to develop individual syllabi for a specific school or class, integrate the content and methods of music and other subjects, and assess pupil abilities and achievements. After evaluating the changes in education at comprehensive schools and the comments and proposals of teachers in 2003, a new version of the General Curricula and Education Standards in Lithuanian Comprehensive Schools was approved. The document basically completed an important stage in restructuring the content of education in comprehensive schools.[6]

Restructuring musical education in Lithuanian schools was based on advanced concepts of musical education, developed and introduced by Eduardas Balčytis.[7] The principal characteristics were complex teaching ideas in which Balčytis argued that musical education based on a single specific musical activity did not allow the manifestation of a child's varied musical abilities. Therefore, he emphasised the significance of singing, listening to music, and playing a musical instrument. Activities were closely interrelated and accounted for a homogeneous system of musical education. A complex structure of the music teaching process complied with the specificity of primary and secondary schools and children's ages and also provided opportunities for

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[5] *Lietuvos bendrojo lavinimo mokyklos Bendrosios programos ir išsilavinimo standartai* [General Programs and Education Standards of Lithuanian comprehensive school], Vilnius, Leidybos centras, 1996.

[6] R. Girdzijauskienė, 'Muzikinio ugdymo standartų taikymo pradinėje mokykloje ypatumai' [The pecularities of realization of music education standarts in primary school], *Tiltai* [Bridges], vol. 33, 2006, p. 31.

[7] E. Balčytis, *Muzikinio ugdymo Lietuvos bendrojo lavinimo vidurinėje mokykloje sistema* [System of music education in Lithuanian comprehensive school], PhD diss., Lithuanian Academy of Music and Theatre, 1993.

unfolding their varied abilities and inclinations. It led to consistent and versatile musical education based on different forms of music making, comprehensive musical ear training, and performing and perception, allowing the teacher to independently and thoroughly differentiate and individualise work based on pupils' musical abilities and inclinations. Pupils were provided with conditions that enabled them to manifest themselves in their favorite fields. Balčytis enriched musical education by replacing one-sided theoretical teaching with teaching closely related to pupils' musical activities.[8]

Vida Krakauskaitė was one of the first authors of the reformed music syllabus and music textbooks for primary school. She had been developing music teaching methodology and improving it in her work with pupils since 1960. From 1995 to 2000, she published her authorial syllabus[9] and the textbooks *Lakštutė* [Nightingale],[10] still used by most primary school teachers. Krakauskaitė's music teaching/learning system was based on ethnicity and the complex character of music teaching activities – their varieties, techniques, and forms. The content of music education was based on Lithuanian folk songs whose structure, melodies, and rhythms were appropriate for primary school pupils. Much attention was paid to Lithuanian-composed songs and instrumental music. Krakauskaitė's methodology was closely related to relative solmisation and Carl Orff's rhythm education system. Her innovation was the interrelation of music teaching with moral education and other academic subjects – Lithuanian, reading, and art lessons. Even though Krakauskaitė considered refusal of theoretisation to be one of the principles of her methodological system, she sought to provide children with theoretical knowledge of music. Content of education included provision of different kinds of knowledge – teaching notation, explaining the characteristics of sound, and training the skills of music making and singing.[11] Even listening to music at school was intended to illustrate knowledge: "It was important to logically and clearly convey the knowledge of music."[12]

New untraditional qualities characterised the music syllabus for primary schools prepared by Eirimas Velička,[13] as did his textbooks *Muzika* [Music].[14]

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[8] V. Tarnauskaitė-Palubinskienė, 'Eduardas Balčytis. Kompleksinio muzikinio ugdymo koncepcija' [The conception of complex music education], in R. Vitkauskas (ed.), *Bendrasis muzikinis ugdymas Lietuvoje: raida ir kryptys* [The general music education in Lithuania: Development and trends], Vilnius, Edukologija, 2012, pp. 63-72.

[9] V. Krakauskaitė, *Pradinės mokyklos programos: Muzika* [Elementary School Programs: Music], Kaunas, Šviesa,1992, pp. 139-160.

[10] V. Krakauskaitė, *Lakštutė. Muzikos vadovėliai I-IV klasėms* [Nightingale. Music textbooks for the 1st to 4th grade], Kaunas, Šviesa, 1995, 1996, 2000.

[11] J. Abramauskienė, 'Vidos Krakauskaitės muzikos mokymo sistema' [Vida Krakauskaitė's musical upbringing system], in R. Vitkauskas (ed.), *Bendrasis muzikinis ugdymas Lietuvoje: raida ir kryptys* [The general music education in Lithuania: Development and trends], Vilnius, Edukologija, 2012, pp. 50-63.

[12] V. Krakauskaitė, *Muzika mažiesiems* [Music for kids], Kaunas, Šviesa, 1994.

[13] E. Velička, *Pradinės mokyklos programos: Muzika* [Elementary School Programs: Music], Kaunas, Šviesa, 1992, pp. 115-139.

[14] E. Velička, *Muzika: I-IV klasių vadovėliai* [Music: Textbooks for the 1st to 4th grade], Kaunas, Šviesa, 1995–1998.

Velička emphasised the opportunity and necessity of national education through music in particular. The idea was not totally new, but he investigated the issue in depth. The theoretical underpinning of Velička's methodology for primary school pupil music education was based on the characteristics of melodies and rhythms of Lithuanian folk songs. Therefore, teaching focused on singing. "The song is a form of Baltic meditation ... one can argue that the ancestral spirit spoke to us through folk art."[15]

Like Krakauskaitė, Velička devoted great attention to notation in the content of education. He argued "when one lived in the epoch of universal literacy, approaching computer literacy … total ignorance of notation looked paradoxical."[16] He criticised the practice of teaching notation based on teaching notes when solmising and playing musical instruments while ignoring the child's experience in intonation and rhythm and proposed distinguishing between teaching melody and rhythm when teaching children notation.

In Velička's music education system, instrumental music was especially important: musical instruments were an effective tool that evoked the interest of primary school children in music. A method used widely by Velička was body percussion. He successfully coped with the problem of musical instruments in schools by introducing a six-hole reed pipe, an instrument for every child. The introduction of the school reed pipe was a significant breakthrough in primary school music education methodology. The reed pipe became an especially favorite instrument used by most primary school teachers in their lessons.

The uniqueness of Velička's system of music education was its ethnic character. Based on ancient Lithuanian folk songs and their rhythms, conditions were created to form a deep sense of ethnic music, and through it, of the ethnic Baltic worldview. This direction in education was reinforced by singing and playing Lithuanian musical instruments and listening to music: all this could define Velička's system as a national music education system.[17]

Velička's music textbooks received positive evaluation from teachers.[18] Most of them found them appropriate, yet some teachers wanted more variety and proposed to make use of not only folk songs but also contemporary tunes: children at that age preferred joyful music with clear rhythm and dynamic

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[15] E. Velička. *Garsų ir tylos paslaptys: Muzika I-IV klasėje* [Secrets of sounds and silence. Music for 1st to 4th grade], Kaunas, Šviesa, 1995, p. 15.

[16] Ibid., p. 61.

[17] K. Barisas, 'Eirimo Veličkos tautinio muzikinio ugdymo sistema' [Eirimas Velička: System of national music education], in R. Vitkauskas (ed.), *Bendrasis muzikinis ugdymas Lietuvoje: raida ir kryptys* [The general music education in Lithuania: Development and trends], Vilnius, Edukologija, 2012, pp. 192-203.

[18] A. Šumskis, 'Bendrojo muzikinio ugdymo problemos švietimo reformos kontekste' [Issues of general music education in the education reform context], in *Muzikinis ugdymas: III respublikinės mokslinės praktinės konferencijos pranešimai* [Music education: Thesis of Third Republican Scientific Practical Conference], Vilnius, VPU leidykla, 1999, pp. 118-121; J. Abramauskienė, 'Vidos Krakauskaitės muzikos mokymo sistema' [Vida Krakauskaitė music education system], in R. Vitkauskas (ed.), *Bendrasis muzikinis ugdymas Lietuvoje: raida ir kryptys* [The general music education in Lithuania: Development and trends], Vilnius, Edukologija, 2012, pp. 50-63.

melodic development. Teachers agreed that folk songs were irreplaceable in education, but the exaggerated prevalence of folklore limited music education with its one-sided content and did not encourage pupils' contemporary socialization. Teachers also missed more contemporary teaching forms and methods.[19] The emergence of such forms was predetermined by the development of integration and creativity in the content and process of education.

Integration provided an opportunity to closely relate artistic education with social and cultural realities of life, provide a holistic understanding of the world, and create context for problem-based education in response to pupils' interests and needs. Education was based on real life and stopped being a field of activity detached from reality. That helped increase motivation for learning, fostered a personal system of values, educated a creative and responsible person with critical thinking skills, and expanded pupils' life experiences and competences.[20]

The initiators of education reform emphasised the special significance of integrated education for work with junior pupils. At that age, pupils were characterised by a holistic understanding of life that was split into specialised areas by differentiated teaching content. Therefore, teachers faced the task of organising the teaching process to comply with the child's homogeneous view of the world and to form a comprehensive picture of people and culture.

Ruta Girdzijauskienė was one of the first educators to develop the idea of integrated teaching in music lessons. In her academic and methodological publications, she revealed that integrated music education could be realised by finding the links between the music content and the traditions of an epoch or a more specific period by applying different methods of interdisciplinary integration, by using teaching materials and tools of other academic subjects in music lessons, and by finding interrelations between musical activities. Girdzijauskienė stressed that it was of primary importance to choose the content of activity that would comply with pupil age, experience, and interests and stimulate their desire to act.[21]

Girdzijauskienė was the first Lithuanian educologist who studied and promoted the development of creativity through musical activity.[22] Before

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[19] A. Šumskis, 'Bendrojo muzikinio ugdymo problemos švietimo reformos kontekste' [Problems of music education in the context of education reform], in *Muzikinis ugdymas: III respublikinės mokslinės praktinės konferencijos pranešimai* [Music Education: Thesis of Third Republican Scientific Practical Conference], Vilnius, VPU leidykla, 1999, pp. 118-121.

[20] Ž. Jackūnas, 'Meninio ugdymo vieta integruoto mokymo sistemoje' [The place of arts education in the system of integrated teaching], in V. Matonis (ed.), Šiuolaikinės meninio ugdymo koncepcijos [Contemporary concepts of arts education], Vilnius, Enciklopedija, 2000, pp. 183-191.

[21] R. Girdzijauskienė, 'Muzikos mokytojų požiūrio į integruotą muzikinį ugdymą pradžios mokykloje ypatumai' [Features of music teachers attitudes towards integrated music education in primary school], *Tiltai* [Bridges], vol. 11, 2002, pp. 39-45.

[22] R. Girdzijauskienė, 'Jaunesniųjų moksleivių kūrybiškumo ugdymas muzikos pamokose' [Development of junior school children's creativity in music lessons], *Lietuvos mokykla: praeitis, dabartis, ateitis* [Lithuanian school: Past, present, future], Klaipėda, Klaipėdos universitetas, 1997, pp. 221-223.

the late 20th century, there were no direct discussions of creativity in Lithuania, but the content of education in Soviet schools provided modest opportunities for development of children's creative powers. One of the priorities in the reformed Lithuanian school was formulated as "the development of an independent and creative personality, able to maximally unfold their abilities as early as at school."[23] When studying primary school pupils' creativity through musical activity, Girdzijauskienė noted that each child could creatively express themselves through performing and evaluating music. Even the youngest children were able to express their thoughts, ideas, and feelings with meaning through musical sounds and, thus, experience the joy of creative activity. Girdzijauskienė's research confirmed that education of creativity through music was important from an educational viewpoint: the child acquired the opportunity to act in a creative way, s/he actualised the world of her/his feelings, imagination, and life-based and artistic experience. Creative activity developed musical abilities and promoted musical intelligence and musical and artistic thinking. She identified major directions in creativity education – accumulation of pupils' musical experience, stimulation of independence in musical activities, and enhancement of the need for creative self-expression.[24] However, Girdzijauskienė emphasised that the greatest impact on pupil creativity was probably the teacher's personality and a creative style of work. A creative teacher understood the teaching process not merely as the transfer of knowledge, but as a process of education of an independently thinking individual. Pedagogical creativity implied the teacher's ability to organise lessons in an untraditional structure, choose relevant teaching materials and use them in an interesting way, apply various teaching methods, and involve pupils in an active education process.[25]

Even though much had been done during education reform to improve the condition of music teaching in primary schools, many scholars[26] agreed that primary school remained the weakest link in musical education in Lithuanian schools. Music was still perceived as rather insignificant, even by primary school teachers. This attitude was because of poor musical competence and preparation of primary school teachers: teachers lacked knowledge of music theory and played musical instruments poorly. That resulted in limited use of

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[23] *Lietuvos švietimo koncepcija* [Education concept in Lithuania], Vilnius, Leidybos centras, 1992.

[24] R. Girdzijauskienė, *Vaikas. Muzika. Kūryba* [Child. Music. Creation], Vilnius, Gimtasis žodis, 2003, pp. 58-62.

[25] R. Girdzijauskienė, *Jaunesniojo amžiaus vaikų kūrybiškumo ugdymas muzikine veikla* [Development of junior school children's creativity in music lessons], Klaipėda, Klaipėdos universiteto leidykla, 2004.

[26] R. Jautakytė, 'Muzikinis ugdymas pradinėje mokykloje' [Music education in primary school], *Lietuvos mokykla XXI amžiuje: konferencijos medžiaga* [Lithuanian school in 21st century: Conference thesis], Klaipėda, Klaipėdos universitetas, 1997, pp. 64-67; A. Šumskis, 'Bendrojo muzikinio ugdymo problemos švietimo reformos kontekste' [Issues of general music education in the education reform context], *Muzikinis ugdymas: III respublikinės mokslinės praktinės konferencijos pranešimai* [Music education: Thesis of Third Republican Scientific Practical Conference], Vilnius, VPU leidykla, 1999, pp. 118-121.

musical instruments and a negative attitude towards music classes. Moreover, at the time, most schools were poorly equipped with technological and musical aids. Researchers concluded that music classes in primary school should be taught by teachers with special music education. Teacher professionalism, personal qualities, and a positive attitude towards music were the best way to bring pupils closer to the values of music.[27]

Conclusion

From the very start, education reform in Lithuania was seen by the public as a key factor for progress and the basis for all social reforms. In the implementation of education reform, all its integral parts were restructured: goals and objectives, content, and methods. In 1993, the General Curricula were published, which regulated the content of education in comprehensive schools. It was a curriculum for national schools of a different structure based on traditions of democratic countries that replaced mandatory Soviet ideology. Lithuanian ethnic values were enhanced and education content and methods were further improved. Music education content responded to new understandings of the goals of arts education – fostering pupils' creative abilities and skills of artistic expression as well as the education of individuals as cultured users of artistic values. The content of musical education became broader, teaching methods more diverse and flexible, and teaching aids were prepared. In primary schools, two weekly music lessons were introduced and alternative music textbooks were published.

Balčytis, Krakauskaitė, and Velička contributed greatly to music education concepts and systems and expanded and enriched the content of music education by bringing music education closer to the needs of contemporary musical culture – the need to listen to and make music. In former Soviet Lithuanian schools, music teaching content was narrow: pupils mainly learnt notation, theory, and singing. After the school reforms, the main characteristic of music teaching in primary schools was complex teaching based on the diversity of musical activities: singing, listening to music, solmisation, rhythmic ear training, and playing musical instruments. The authors of new education concepts and systems emphasised national music education. They evaluated the fact that the unique character of ethnic culture and musicality was expressed through intonation. Therefore, early listening to ethnic music, singing, and introduction of ethnic culture were accentuated, focusing on the dissemination of Lithuanian folk and professional music.

The restructuring of education in the reformed school of Lithuania was also related to the development of integration elements in the content and process of education. Integrated musical education was actualised by establishing

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[27] R. Jautakytė, 'Muzikinis ugdymas pradinėje mokykloje' [Music education in primary school], *Lietuvos mokykla XXI amžiuje: konferencijos medžiaga* [Lithuanian school in 21st century: Conference thesis], Klaipėda, Klaipėdos universitetas, 1997, pp. 64-67.

links between the content of music and the realities of social and cultural life by applying various interdisciplinary education techniques, using teaching materials and aids from other academic subjects in music lessons, and finding interrelations between musical activities.

One of the most important goals of the reformed school was education of the creative individual. The development of primary school pupil creativity through musical activity was important from an educational viewpoint: upon acquiring the opportunity to act creatively, children actualised their world of feelings, imagination, and life-based and artistic experience. Creative activity developed their musical abilities, musical intelligence, and musical and artistic ways of thinking. Thus, the key directions of creativity development were identified: accumulation of pupils' musical experience, stimulation of independence in musical activity, and encouragement of the need for creative self-expression.

Despite education reforms, primary school remained the weakest link in musical education in Lithuanian schools. Successful implementation of the goals and the content of music education were prevented by poor musical competences of primary school teachers, which resulted in negative view of music lessons by pupils and music teachers. Researchers in the field discussed the need to improve the training of prospective primary school teachers.

Chapter III

Raising the New Personality: Changes in the Culture of Upbringing/Education

Child Rearing in the Family: Social Perspective in Latvia

Nora Jansone-Ratinika, Dace Medne and Ilze Dinka

Abstract. Transformations in the socio-political situation of Latvia after regaining independence in 1991 initiated a search for and presentation of a new emphasis on family pedagogy, which determined the dominant discourses in the topic of child rearing. The situation reveals a problem of research and substantiates our aim: to identify and analyse how the change in the discourse of child rearing reflects the dynamics of pedagogical thought in Latvia from 1990 to 2004. Our study was quantitative, applying content analysis and discourse analysis methods that allow analytical and descriptive comparisons of the narratives in *My Little One* and Yearbook with concepts in pedagogical literature and other sources. Ideological attitudes during the periods of post-independence and Europeanisation reveal dual tendencies: society is partially inclined to renew the patriarchal order of the interwar period, but advancement of democracy and emancipation determines reformation of the traditional order. Even though family is assigned an important role at the state level, proposed support and initiatives do not form a holistic framework of assuring resources. An obstacle for unified advancement is seen in polarisation – categorical denial of the ideological settings and practices of the Soviet period or glorification of the pedagogical ideas of the interwar period and uncritical euphoric acceptance of international tendencies.

Keywords: child rearing, social perspective in Latvia, media, pedagogical literature discourse

> *United Nations Universal Declaration of Human Rights has declared that childhood is entitled to special care and assistance, convinced that family, as the core group of society and the natural environment for the growth and well-being of all its members and particularly children, should be afforded the necessary protection and assistance so that it can fully assume its responsibilities within the community, recognizing that the child, for the full and harmonious development of his or her personality, should grow up in a family environment, in an atmosphere of happiness, love and understanding, considering that the child should be fully prepared to live an individual life in society, and brought up in the spirit of the ideals proclaimed in the Charter of the United Nations, and in particular in the spirit of peace, dignity, tolerance, freedom, equality and solidarity.*[1]

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[1] United Nations, 'Convention on the Rights of the Child. Signed 20 November 1989,' *Latvijas Vēstnesis* [Latvia's Herald], 28 November 2014. Available: https://www.vestnesis.lv/op/2014/237.16 (accessed 5 October 2019).

The correct path to a genuinely happy society is by helping children and the families in which they are raised. And so little is required to come closer to this goal – a small amount of civic courage, a heartfelt approach, and wisdom in everyday work and life.[2]

Introduction

Transformation in the socio-political situation of Latvia after regaining independence in 1991 initiated changes in society and raised the need for transformation of perceptions and processes related to society in general, as well as for social groups – families and individuals, children, fathers, and mothers. This situation initiated a search for a new focus and introduction of family pedagogy, which determined the discourse in child rearing. From 1990 to 2004, child rearing theories and practice were intertwined with the search for new reference points in time and space. Social processes related to economical and political instability in the state directly impacted the well-being of the family and the individual, both in daily practical issues and in the ideological dimension. This caused changes in perceptions and attitudes of people and initiated the need for radical social innovations.

Social rearrangements in Latvian society after regaining independence have not been fully researched, so the objective of this study is to identify and analyse how the transformation of the discourse of child rearing reflected the dynamics of pedagogical thought in Latvia from 1990 to 2004. How did changes in the discourse of child rearing take place?

Various perceptions and applications of child rearing in literature are outlined in this study: explanations of child rearing ideas in social practice[3] (changes in aims, approaches, and their relation and interactions in the frame of the family model) in the family from the dimension of the media narrative (thinking, viewpoints) and instruments (practices, actions). In turn, pedagogic thought is perceived as a conceptualised and scientifically justified totality of theory and practice typical for the society of Latvia during this period.

Source description and research methodology

Sources published from 1990 to 2004 were selected: the magazine *Mans Mazais*[4] [My Little One] (MLO), the yearbook *Mājai un* ģimenei[5] [For Home and Family] (Yearbook), pedagogical literature, academic studies, and documents were analysed to reconstruct family child rearing in the social perspective.

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[2] A. Jākobsone, 'Ievads' [Introduction], in *Bērni un ģimenes Latvijā 1994* [Children and families in Latvia], Rīga, AS Preses nams, 1995, p. 9.

[3] T. A. Van Dijk, *Discourse Studies: A Multidisciplinary Introduction. Discourse as Social Interaction*, UK, Sage Publications, 2011, p. 432.

[4] Analysis included 3642 articles published in the magazine *My Little One* from 1994 to 2004.

[5] Analysis included 30 articles published in the *Yearbook* from 1990 to 1996.

Pedagogical literature, expressing and analysing current trends, impacts the viewpoints of parents, educators, and society in general in regard to pedagogical attitudes, thus altering also the practice of child rearing. As several scholars note, mass media helps people to construct their cultural experiences,[6] influencing everyday behavior and forming and replicating ideas, opinions, judgments, standards, and values, thus determining public opinion both philosophically, didactically, and ethically.[7] MLO and Yearbook can be considered important agents in the discourse of child rearing, comparable in regards to the source type and target audience.

From 1990 to 1996, Yearbook had four compilers, who were leading Latvian journalists and public figures at the time. The price of the Yearbook made it accessible to families with average income. The Yearbook described its target audience – Latvian parents and families – as the community of readers of yearbooks and calendars to whom this Yearbook served as a guide not only for advice on farming, cattle-breeding, household management, and maintaining a healthy lifestyle, but also ethics for the family and upbringing of children.[8] The compilers expressed the situation of society in the second yearbook with the words of Hamlet, "when the time is out of joint", and characterised the publication as a signpost between the cultural heritage of the Latvian mentality and new trends in educating the population.[9]

From MLO, which is still published, 105 issues were analysed with 3642 articles. Initially, the magazine was published four to six times annualy, but since 1997 it has been published monthly. MLO can be considered a stable, illustrated popular science publication and a significant voice in the discourse of family pedagogy. The publication has had several journalists as editor-in-chief. MLO cannot be classified as a professional pedagogical periodical; it positioned itself as a parental lifestyle magazine, similar to men's and women's lifestyle magazines that gained popularity at the end of 1990s.[10] The mission of MLO, to "discover the world of the child, beginning with practical issues and concluding with psychological conversations", was achieved by passing

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6 Z. Rubene, '*Homo Medialis* kā izpētes fenomens pedagoģiskajā antropoloģijā' [*Homo Medialis* as a research phenomenon in pedagogical anthropology], in T. Koķe, B. Kaļķe (eds.), *LU Raksti. Pedagoģija un skolotāju izglītība* [Articles of the University of Latvia. Pedagogy and teacher education], vol. 781, Rīga, LU Akadēmiskais apgāds, 2012, pp. 10-17.

7 I. Ķestere, Z. Āķīte, 'Pedagoģijas mācību grāmata kā medijs jauna cilvēka audzināšanai: Latvijas pieredze 19. un 20. gadsimtā' [Pedagogy textbook as a medium for nurturing a young person: the experience of Latvia in the 19th and 20th century], in T. Koķe, B. Kaļķe (eds.), *LU Raksti. Pedagoģija un skolotāju izglītība* [Articles of the University of Latvia. Pedagogy and teacher education]*,* vol. 781*,* Rīga, LU Akadēmiskais apgāds, 2012, pp. 200-210.

8 O. Zanders, 'Ceļavārdi, gaitu sākot' [Good luck wishes on a new journey], in *Gadagrāmata'90 'Mājai un ģimenei'* [Yearbook'90 'For home and family'], Rīga, Avots, 1989, pp. 28-31.

9 A. Galandere, 'Cienījamo lasītāj!' [Dear reader!], in *Gadagrāmata'91 'Mājai un ģimenei'* [Yearbook'91 'For home and family'], Rīga, Avots, 1990, pp. 33-34.

10 S. Veinberga, *Mediju misija. Preses attīstības tendences Latvijā pēc valsts neatkarības atjaunošanas (1990–2010)* [Media mission: Press development trends in Latvia after the restoration of independence (1990–2010)]*,* Rīga, Zvaigzne ABC, 2010, p. 160.

the message on to "modern parents", their potential target audience. The key idea of the magazine was to "find the way to successfully combine individual desires and responsibilities of motherhood", as well as the call for action typical for the 1990s – define "the role of the loyal father in the family".[11] The conceptual framework of the magazine described every moment in the life of a child, who was an eternal source of joy and care to his/her parents at every moment of life: the quality of the child's life was the aim of the entire discourse.[12] The content of the information initially included in the magazine was about children from 0 to 12 years, but after 2000 it was reduced to 7 years. The magazine included articles about the development, health, and child rearing, as well as relations in the family and society, depicting life with children from the moment of conception to the start of school.[13]

Study was quantitative, applying content and discourse analysis methods that allowed to analytically and descriptively compare MLO and Yearbook narratives with concepts found in pedagogical literature and other sources.

To analyse linguistic content of MLO and Yearbook narratives, key factors raising primary associations were selected – family, child, father, and mother – representing the core of the family. Secondary selections identified adjectives of the actors and their activities with identical and close substantial meaning – forms of names in different cases, singular or plural (for example, baby, mother, newborn, grandparents, daughter, child rearing, family etc.), characterising key roles and functions fulfilled by the main actors.

The first linguistic content analysis of the titles of MLO articles was performed using the quantitative data processing program QSR NVivo 11, but Yearbook content, pedagogical literature, and other sources were analysed manually. A computer program was selected based on several functional benefits: (1) automising initial starting data mass and manually applying it to the ideological essence during later stages of analysis. This allowed convenient summarisation and systematisaton of qualitative data and performance of simple content analysis, identifying most frequently encountered names, contexts, and meanings of their use; (2) provided the possibility to filter large volumes of data in different correlations and contexts automatically, therefore methodologically precisely in a brief period of time, thus significantly accelerating analysis and making it more objective; and (3) software consecutively stores the historical commands allowing the researcher to manage the course of coding and analysis of the content in a meaningful way.[14]

Data was processed and analysed on several levels. Firstly, content units of press publication titles were imported in the NVivo file where they were

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[11] 'Redaktora sleja' [Editor's column], *Mans Mazais* [My little one], no. 1, 1994, pp. 1-2.

[12] R. Vasile, 'Kad jūs vai es (vai mēs) sakām – mans mazais' [When you or I (or we) say – my little one], *Mans Mazais* [My little one], no. 1, 1994, p. 2.

[13] 'Positioning of the magazine MLO in the Latvian press publications catalogue.' Available: https://abone.pasts.lv/lv/latvijas_preses_izdevumi/zurnali/2015/ (accessed 17 September 2017).

[14] A. Bryman, *Social Research Methods,* UK, Oxford University Press, 2016, pp. 604-617; P. Bazeley, K. Jackson, *Qualitative Data Analysis with NVivo*, London, SAGE Publications, 2013.

technically edited and openly coded in a consecutive manner; initially a 3000-word frequency was set and then weighted to the ratio of frequency: 184 words were identified and selected and from them, 50 basic key words (codes) that characterise the basic factors of the nuclear family in terms of content were determined. Secondly, we performed hierarchic coding-grouping to determine thematically related key words and groups, frequency of their use, and mutual contextual meanings that disclosed the essence of the focus 'child rearing in the family' in terms of content. The final level was the basis of the structure of codes developed in content analysis and in-depth study of the interpretation of content and mutual coherence in the publications to test the validity of the contextual meaning of titles and to identify trends.

Family and child in the crossfire of the socially political situation

Drastic changes in politics, economics, culture, and education after Latvia regained independence[15] initiated a quest for structure on the levels of the individual, family, community, and state. A situation without established and stable key values, a clearly-defined future direction, or determined and imposed priorities of action can be, on the one hand, a threat because the processes that take place are diffuse. But a different perspective might accentuate the constant, dynamic development of society, institutions, family, and the individual. A politically-charged new social situation created two directions: erosion of past approaches and anti-nostalgia concepts infiltrated society about the Soviet past[16] and new future-related quests in various areas. The times did not allow the ability to come to terms with what was achieved and created before but anticipated intense revision of the past and present, resulting in creativity in many areas. The quest of Latvian society is also depicted in the sources of this study. Questions were asked indirectly and directly – where are we going, what can we value now, to whom should we listen, in which direction should we look, is everything from the past worthless and everything from future desirable?

Family life cannot be separated from the social space, changes in the era, and society-initiated changes in socio-cultural components. The harsh survival mode many families were put into made it clear that independence and prosperity were not inseparable notions or even synonyms. The overall

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[15] I. Ķestere, A. Grāvīte, 'Daži Latvijas augstākās izglītības ekspansijas aspekti' [Several aspects of higher education expansion], in T. Koķe, A. Krūze, D. Markus (eds.), *Apvienotais pasaules latviešu zinātnieku 3. kongress un letonikas 4. kongress. Zinātnisko rakstu krājums CD formātā. Izglītības izaugsmei: pagātne, tagadne un nākotne* [Third world congress of Latvian scientists and fourth congress of Latvian studies. Scientific article collection in a CD format. For educational growth: Past, present and future], Rīga, 2011, pp. 1-9.

[16] J. Ekman, J. Linde, 'Communist Nostalgia and the Consolidation of Democracy in Central and Eastern Europe,' *Journal of Communist Studies and Transition Politics,* vol. 21, no. 3, 2005, pp. 359-361; M. Kaprāns, 'Padomju laika sociālās reprezentācijas latviešu pēcpadomju biogrāfiskajā diskursā' [Social representations of Soviet era in post-Soviet Latvian biographical discourse], PhD diss., University of Latvia, 2012.

socio-economic situation in Latvia worsened,[17] and it did not strengthen the trust of the population in a state that cared for their prosperity and security. It also did not support national awareness and understanding that people and especially families form the basis of this growth[18] and that they are entitled to rights, as well as responsibilities, to join forces in the construction of the new sustainable state. Tasks of national importance on several levels were to (1) develop civic consciousness,[19] (2) ideologically raise the self-identity and self-value of Latvian families' children and parent comparisons of the Baltic states and "successful" and "innovative" foreign countries,[20] and (3) practically provide a Western-style social support system to secure the needs of the family and raise the quality of life.[21]

The transition to the market economy, in which individuals are responsible for providing one's own means of existence, frequently became extreme denial of joint responsibility, the collapse of industry, a rapid increase of unemployment and inflation, denationalisation, and devaluation of currency that affected savings and equities (bonds). The economic crisis caused rapid decline in the welfare of families with children. This situation also caused concerns regarding security, stability, and further development of the state. Families found it difficult to survive as social welfare constituted a little less than half of the state budget.[22] An acute necessity to improve the social support system became more evident. Legislative changes demonstrated the necessity to audit the family issues within the legislative context and began to coordinate legislation with European laws and regulations concerning issues of family and children.[23]

We determined three evolutionary stages in social security (social security aid, labour protection, employment and health care) which ranged from chaotic and uncoordinated attempts to politically and strategically compliant but

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[17] A. Jākobsone (ed.), *Bērni un ģimenes Latvijā 1994* [Children and families in Latvia 1994], Rīga, AS Preses nams, 1995.

[18] P. Eglīte, 'Dzimstība un ģimenes politika Latvijā 1990.–2009. gadā' [Birth rate and family policy in Latvia 1990–2009], *Latvijas Zinātņu Akadēmijas Vēstis* [Latvian Academy of Science News], vol. 65, no. 3/4, 2011, pp. 17-33.

[19] M. Kaprāns, 'Padomju laika sociālās reprezentācijas latviešu pēcpadomju biogrāfiskajā diskursā' [Social representations of Soviet era in post-Soviet Latvian biographical discourse], PhD diss., University of Latvia, 2012.

[20] Publications of the *Yearbook* from 1990 to 1996.

[21] L. Āboliņa, 'Ģimene un tās atbalsta politikas attīstība Latvijā (1990–2015)' [Family support policy and its development during 1990–2015], PhD diss., University of Latvia, 2016.

[22] Centrālā statistikas pārvalde [Central statistical bureau of Latvia], *Latvija: Galvenie statistikas rādītāji 1993–1994* [Latvia: Main statistical indicators 1993–1994], Riga, State Statistical Commission, 1994, p. 5.

[23] L. Āboliņa, 'Ģimene un tās atbalsta politikas attīstība Latvijā (1990–2015)' [Family support policy and its development during 1990–2015], PhD diss., University of Latvia, 2016.

realistically unenforceable measures due to lack of resources[24] up to a targeted system of social welfare, support and services.

From 1990 to 1994, the social security and welfare system developed gradually, adopting laws and regulations that matched international human rights declarations Latvia had signed.[25] Maternity allowances increased gradually, and support for disadvantaged families and large families was reconsidered. At the end of this period, implemented legislation was based on a universal approach towards all children, disregarding the financial situation of the family, its structure, or number of children. Minimum wage and amount of child support were regularly revisited and increased, but the high divorce rate created families with one bread-winner (in the 1990s, 29.9% of all babies were born outside marriage, and civil marriage was not yet recognised[26]), resulting in a situation below the crisis minimum. Child support or alimony were not yet provided.[27]

In the beginning of 1990s, additionally to state support, families received significant assistance from NGOs such as the Children's Foundation of Latvia in existence since 1989.[28] MLO mentions the Foundation often. The Latvian branch of Save the Children – 'Glābiet bērnus' – provided not only practical support to Latvian families with children but also contributed greatly to raising awareness, with the help of mass media.[29] The Latvian National UNICEF Committee could be felt in many areas related to family life, and they were also promoted in MLO. One UNICEF project was the breast-feeding project implemented together with the Latvian National Perinatal Care Centre (founded in 1995) that resulted in the translation and publishing of educational literature for parents.[30]

Study of the MLO narrative and analysis of academic literature in the early 1990s[31] indicates a correlation between problems of social pedagogy in society

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[24] I. Pavlina, M. Brants, 'Valdības deklarētā demogrāfiskā politika un tās īstenojums Latvijā (1990–2002)' [Government declared state support and its implementation in Latvia (1990–2002)], in *Apcerējumi par Latvijas iedzīvotājiem, Nr. 9: Ģimeņu veidošanās un valsts atbalsts ģimenēm atjaunotajā Latvijas Republikā* [Review of Latvian residents, no. 9: Family development and state support for families in restored Republic of Latvia], Rīga, BO SIA LZA Ekonomikas institūts, 2002, pp. 31-47.

[25] Latvia is a member state of UN since 17 September 1991 and UNESCO since 14 October 1991.

[26] J. Vebers, 'Family Law in Latvia: From Establishment of the Independent State of Latvia in 1918 to Restoration of Independence in 1993,' in A. Bainham (ed.), *The International Survey of Family Law 1997*, Netherlands, Martinus Nijhoff Publishers, 1999, pp. 207-227.

[27] L. Āboliņa, 'Ģimene un tās atbalsta politikas attīstība Latvijā (1990–2015)' [Family support policy and its development during 1990–2015], PhD diss., University of Latvia, 2016.

[28] 'Children's Foundation of Latvia.' Available: http://www.lbf.lv/lv (accessed 13 December 2018).

[29] A. Jākobsone, *Bērni un ģimenes Latvijā 1994* [Children and families in Latvia 1994], Rīga, AS Preses nams, 1995, p. 112.

[30] H. Kovacs et al., *Kanādas vadošie medicīnas darbinieki. Bērna kopšanas mazā enciklopēdija* [Leading Canadian health professionals. Encyclopedia of child health and care], Rīga, Jumava, 1995; *10 soļi sekmīgai krūts barošanai* [Ten steps towards successful breastfeeding], Latvijas Nacionālā UNICEF Komisija, 1994.

[31] A. Baldiņš, A. Raževa, *Skolas un ģimenes sadarbība* [Cooperation between a family and school], Rīga, Pētergailis, 2002, p. 81.

(large, poor, and disadvantaged families as well as cooperation between school and home) and the increasingly important role it played in the academic field and professional practice.[32]

From 1995 to 2002, the law 'On Social Support'[33] was in force in Latvia. Demography was a priority during this period. To ensure an increase in population and improvement of the quality of life of the Latvian population in general (public health, education, culture, and public morality), the Cabinet of Ministers issued the regulation 'On Improvement of the Demographic Situation' directed towards development of laws and regulations and strategic long-term policy. Financial means were not provided for, but the Ministries of Welfare, Education and Science, Interior, Culture, and Environmental and Regional Development and municipalities were asked to develop and submit recommendations. The document was like a guideline: municipalities were recommended to provide free first aid kits to parents of newborns; differentiate utilities payments depending on the number of minor children (considering age and health conditions), anticipate funds in municipal budgets to subsidise public transport expenses for extra-curricular classes, compensate food and medical expenses for large and/or disadvantaged families, and subsidise public transport costs for low income and/or large families and organise summer leisure activities and employment for their children. These regulations supplemented legislation,[34] and amendments affected family allowance calculation principles, adjusting them to a coefficient system.

At this time, MLO took on a consultative role, becoming a guide for parents about legislation that was ever-changing and only partially provided equality at a time when families lacked trust in the law and sometimes even questioned its legitimacy because of the deficiency of resources.[35]

Correlation is also seen between the changes in the market system: children's goods became more expensive and the amount of allowances increased. Again, MLO fulfilled a significant role as consultant by comparing prices of local and imported goods that sometimes were greeted with euphoria in the maintaining of household and caring for the children and their development both in terms of qualitative functionality and price and value ratio.

Upon reaching the lowest birth rate ever in 1998,[36] the Cabinet of Ministers 'On the National Programs for Implementation of Economical Policy' approved

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[32] A. Raževa, A. Baldiņš (eds.), *Sociālpedagoģiskās inovācijas. Rakstu krājums* [Socio-pedagogical innovations. Article collection], vol. 1, Rīga, Latvijas Universitāte, Pedagoģijas un psiholoģijas fakultāte, Sociālo un pedagoģisko inovāciju fonds, SIA Elpa-2, 1999.

[33] Law 'On the Social Suppor' adopted 26 October 1995, in 2003 was replaced with the currently valid Law on the Social Support and Social Services.

[34] Legal Information Centre of the Ministry of Justice of the Republic of Latvia, *Legislation of the Republic of Latvia. Family Rights,* Madona, SIA Madonas poligrāfists, 1995, p. 199.

[35] A. Jākobsone (ed.), *Bērni un ģimenes Latvijā 1994* [Children and families in Latvia 1994], Rīga, AS Preses nams, 1995.

[36] P. Zvidriņš (ed.), *Depopulācija un tās novēršanas iespējas* [Depopulation and ways of averting it], Rīga, Zinātne, 2005.

the national program 'Population of Latvia'[37] with the Minister of Welfare as its head. The aim of this program was to summarise information about the social security system and outline a short- and long-term development strategy. Optimisation of state support for families with children was anticipated by introducing new forms of support and by increasing the amount of existing benefits. At the end of 1999, the Ministry of Welfare developed the concept 'On the Support of Families with Children' with the aim to come up with an action plan that would promote formation of strong families and improvements in the demographic situation over a 10-20-year period. Although the government declared support for families, it did not provide real help due to lack of a common system of resource assurance. The new plan anticipated various activities for improvement of the status of families by encouraging families to assume basic responsibilities themselves, but the state would help in emergency situations only.

The conceptual catalyst of the practical support system and its achievable result was the turning point in public opinion on the preservation of values: strengthening of the role of family, its significance, and the need to restore its prestige. Overcoming family crises includes complex measures – activities promoting both mental and material factors in the formation of social and economical environment[38] such as providing housing to families through a housing development loan program prioritising young families. Another activity anticipated payments in addition to the family allowance in August so children could better prepare for the start of school on 1 September. Paternity allowance was also considered, allowing parents to choose who would receive the allowance, as well as promoting more active involvement and responsibility of fathers in the rearing of their children. A ten-day paternity leave allowance was initiated and paid for starting from 2004.[39]

To promote expansion of families, social allowances for socially unprotected student families were initiated and school bus services were planned for children of families living in rural areas. An increase in social allowances was planned for low income families indirectly through increases in state subsidies for health and educational services used by families with children.

In total, this policy planning document reflected a progressive approach, but the state's attempts to improve the conditions of families could be measured only after several years. The measures did not satisfy the ambitions of political parties and the necessity for officials to prove the immediate efficacy of their decisions and actions. Therefore, policies usually included support for short-term

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[37] 'Nacionālā programma 'Latvijas iedzīvotāji. 1998" [National program 'Population of Latvia. 1998'], *POLSIS Politikas plānošanas dokumentu datubāze* [Policy planning document database]. Available: http://polsis.mk.gov.lv/documents/342 (accessed 22 January 2019).

[38] Ministry of Welfare, 'Concept for the Support to Families with Children,' *Latvijas Vēstnesis* [Latvia's Herald], 10 February 2000. Availabe: https://www.vestnesis.lv/ta/id/954 (accessed 18 March 2020).

[39] L. Āboliņa, Ģimene un tās atbalsta politikas attīstība Latvijā (1990–2015) [*Family and the development of its support policy in Latvia (1990–2015)*], PhD diss., University of Latvia, 2016.

activities.[40] In solving social problems, the state focused more on tactical and not strategic initiatives.[41] To a certain degree, this can be attributed to the specifics of a situation that demanded immediate solutions for escalated problems and growing negative public feelings that raised the level of frustration and requests for immediate changes in society. Specific solutions for some urgent problems partially neutralised the collision between people and political power.

Focusing on immediate short-term solutions, protection of the interests of children and families of future generations was left in the background. Nevertheless, development of the concept and its approval by the government outlined a new stage in the development of family state support policies since regaining independence.

From 2003 to 2008, family support was put on the policy agenda. Again, new progressive laws and regulations and policy planning documents directly or indirectly influenced the family; they institutionalised family support policies and introduced new functional family support tools.[42]

Until 2003, almost none of the system principles were implemented consistently or provided valuable input in the support of families and children rights. In 2004, discussions continued regarding the development of an optimal support system model. Discussions resulted with an action plan, 'State Family Policy from 2004 to 2013,' under the Ministry of Children and Family Affairs. Each year, its task was to submit informative reports regarding implementation of the action plan to the Cabinet of Ministers.[43] For the first time, this document merged activities related to children and family support policies, and many activities had multi or interdisciplinary approaches. However, a discussion of its results is outside the scope of this paper. As the fulfilment time of the Action Plan exceeds the scope of this study, we will not analyse results of this plan.

Conceptual imperative and instrumental performance of child rearing activities

When Latvia adopted the UN Convention on the Rights of the Child in 1991, the quality of life of children was set as a national priority, and parents and families were the priority target group. This affected not only legislation but also social processes. Messages were distributed through various communication channels that an emotionally healthy family environment and

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[40] L. Āboliņa, Ģimene un tās atbalsta politikas attīstība Latvijā (1990–2015) [*Family and the development of its support policy in Latvia (1990–2015)*], PhD diss., University of Latvia, 2016.

[41] A. Jākobsone, *Bērni un ģimenes Latvijā 1994* [Children and families in Latvia 1994], Rīga, AS Preses nams, 1995.

[42] L. Āboliņa, Ģimene un tās atbalsta politikas attīstība Latvijā (1990–2015) [Family and the development of its support policy in Latvia (1990–2015)], PhD diss., University of Latvia, 2016.

[43] Ministry of Children and Family Affairs, 'Informative Report on the Implementation of Action Plan Concept 'State Family Policy' from 2004 to 2013, results of 2005, 2006,' *POLSIS Politikas plānošanas dokumentu datubāze* [Policy Planning Document Database]. Available: http://polsis. mk.gov.lv/documents/1635 (accessed 22 January 2019).

effective parental functions are the preconditions for the health of the new generation.[44] A beneficial prerequisite for this concept was also studies of public values performed in the early 1990s that were frequently mentioned in MLO and Yearbook: they revealed that family was the first or second most important value for the nation. The hierarchy of values expressed in the results of the studies were a supportive precondition for revision of parent-child relations and relations between parents: the purpose was to strengthen parents as a significant, safe source of connection and support in personality development and the educational path of the child.[45] This concept was emphasised even further when the UN proclaimed 1994 as the International Year of the Family.

Evaluation of the existing situation and calls for more focus on child rearing in families can be read in almost all sources devoted to family issues.[46] Child rearing and learning was considered the source for the renaissance of the nation, initiating discussion about persperctive directions. The publishers of MLO restored the importance of child rearing tips, emphasising suitable and quality education as a necessity for broad development possibilities. Despite the swirl of pluralism and democracy in the social space, scholars and practitioners acknowledged that common reference points should be set for child rearing – traditions, ideals, approaches in defining goals, and desirable result and methods. In many ways, the already established consumer culture outside the borders of Latvia and protection of Latvian national ethical traditions were opposed to each other as a child rearing goal. Yearbook focused considerably more on the latter, but MLO's opinion of "correct" child rearing leaned towards support of consumerism culture. One might think that this was not a purposeful decision by the editors but more a natural result of content construction and specifics of topics. If child rearing issues in Yearbook were revealed in poetic and philosophical stories about ideal family relations and child rearing, emphasising the public moral imperative of Latvian folk songs, then MLO could be considered a practical parent's everyday guide with content having a more specific approach in daily child rearing.

New liberalisation and democracy slogans required sense, so stability and discipline in child rearing was discussed in almost every issue of MLO from various perspectives; for example, whether the discourse of rights and dialogue

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[44] A. Jākobsone, *Bērni un ģimenes Latvijā 1994* [Children and families in Latvia 1994], Rīga, AS Preses nams, 1995.

[45] Dž. Boulbijs, *Drošais pamats. Vecāku un bērnu savstarpējā pieķeršanās – cilvēka veselīgas attīstības priekšnoteikums* [A secure base: Parent-child attachment and healthy human development]*,* Rīga, Rasa ABC, 1998, p. 198.

[46] Publications of *MLO* and *Yearbook* analysed in the study; see also A. Jākobsone, *Bērni un ģimenes Latvijā 1994* [Children and families in Latvia 1994]*,* Rīga, AS Preses nams, 1995; Dž. Boulbijs, *Drošais pamats. Vecāku un bērnu savstarpējā pieķeršanās – cilvēka veselīgas attīstības priekšnoteikums* [A secure base: Parent-child attachment and healthy human development]*,* Rīga, Rasa ABC, 1998; European Economic and Social Committee Opinion 'The Role of Family Policies in the Context of Demographic Change to Promote the Exchange of Best Practices Between Member States,' 2001. Available: http://lietussargs.lv/wpcontent/uploads/2011/05/MB_ces804-2011_ac_lv.pdf (accessed 22 August 2017).

can be combined with borders, standards, procedures and how that alters power relations in the family. It should also be noted that not all members of society, just like today, were enthusiasts of democracy; democracy had many opponents because it was an unfamiliar reality for Latvian society.[47]

The 1990s marked a crisis period in pedagogy. History and the era at the time was directed by academia and the representatives of power who believed pedagogical thought and ideas should be recreated into a new[48] theory and practice – from authoritarianism to humanism – in which unique, free, independent and responsible personalities are the main purpose for child rearing and societal development.[49]

Attempts at democracy and autonomy of the personality can be seen in childrens' rights as determined in laws and regulations[50] and also in the child rearing trend, expressed in MLO and pedagogical literature, to listen to the needs of children and respect them as a value and individual.[51] A range of factors impacted the world view of the child – family, school, mass media, and other opinions expressed in the public space form a child's opinions about others as well as perceptions of him or herself.[52] A significant responsibility of parents was to observe the principle of objectivity and regularity:[53] avoiding sporadic, fragmented, and inconsistent behaviour and chaotic goals and promoting adequate but positive formation of the self-image of the child. Therefore, both MLO and pedagogical literature encouraged parents to help children to grow up brave, confident, and with a favourable attitude towards the environment.[54]

[47] A. Plakans, *Concise History of the Baltic States,* UK, Cambridge University Press, 2011.

[48] G. Korņetovs, 'Pedagoģijas vēstures pētījumu metodoloģijas pamatproblēmas' [Basic problems of pedagogy history research methodology], in A. Krūze (ed.), *Laikmets un personība. Rakstu krājums* [Era and personality. Collection of articles]*,* vol. 15, Rīga, RaKa, 2015, pp. 184-195.

[49] A. Špona, 'Pedagoģijas zinātnes daži metodoloģijas aspekti' [Methodological ascpects of pedagogical science], in *RPIVA Zinātniskie raksti* [RPIVA Collection of scientific articles], vol. 4, Rīga, SIA Petrovskis un Ko, 2004, pp. 10-18.

[50] A. Rektiņa, 'Apvienoto Nāciju konvencija par bērna tiesībām un Latvijas likumdošana' [UN Covention on Rights of the Child Law and Latvian Legislation], in A. Jākobsone, *Bērni un ģimenes Latvijā 1994* [Children and families in Latvia 1994], Rīga, AS Preses nams, 1995, pp. 83-90.

[51] Dž. Boulbijs, *Drošais pamats. Vecāku un bērnu savstarpējā pieķeršanās – cilvēka veselīgas attīstības priekšnoteikums* [A secure base: Parent-child attachment and healthy human development]*,* Rīga, Rasa ABC, 1998; L. Grigule, I. Silova, *Mācīsimies sadarbojoties* [Learning through cooperating], Rīga, Sorosa fonds – Latvija, 1998; A. Špona, *Audzināšanas teorija un prakse* [Education: Theory and practice], Rīga, RaKa, 2001.

[52] D. Lieģeniece, *Bērns – pasaulē, pasaule – bērnā* [A Child within the world, the world within a child], Rīga, Zvaigzne, 1992.

[53] A. Špona, 'Pedagoģijas zinātnes daži metodoloģijas aspekti' [Methodological aspects of pedagogical science], in *RPIVA Zinātniskie raksti* [RPIVA Collection of scientific articles], vol. 4, Rīga, SIA Petrovskis un Ko, 2004, p. 15.

[54] A. Vecgrāve, *Kā uzveikt bailes* [How to overcome fear], Rīga, Zvaigzne ABC, 1999. p. 24.; A. Vecgrāve, *Kā uzveikt dusmas* [How to overcome anger]*,* Rīga, Zvaigzne ABC, 1999. p. 23; A. Bakisa, *Mans bērns nebaidās un paļaujas uz sevi* [My child is not afraid and relies on himself]*,* Rīga, Alberts XII, 1999, p. 148.

The shift of the child rearing paradigm from a totalitarian one to democracy was gradually implemented with the help of epistemological, theoretical, and practical knowledge that gave parents theoretically justified and applicable tips for child rearing. These tips, recommendations already embedded in the European culture and conceptual dimension, analysed the worldview and pluralism. Academic pedagogy was more inclined to disassociate itself from Russian culture imposed on the nation by Soviet power and to glorify the cultural heritage of Latvia[55] as well as accept Western concepts without criticism.[56]

To rehabilitate and bring back national cultural virtues – Latvian public morals, endowments, importance of the family, home not as a living space but provider of the blessing of the life cycle of the child – Yearbook and occasionally MLO published the works of Latvian poets that were banned under Soviet dictatorship. It made people think about values, sacred and true things that should be emphasised in the spirit and heart of every Latvian. They also gave inspiration to parents in child rearing: it gave them power to be better caregivers. An invitation to humanise minds and care for the culture of the heart was also expressed in pedagogical literature.[57] Both Yearbook and MLO had abundant material about Latvian national festivities and traditions, officially banned during the Soviet era, making implementation of these traditions a precondition for national identity and rehabilitation of the sense of belonging to Latvia. The power of national and family traditions was the time spent together, strengthening the sense of belonging in the atmosphere of the national awakening. It should be noted that both sources supplemented each other: Yearbook focused on philosophical thought and MLO was oriented towards practical topics and various situations.

With the revision of pedagogy, there was concern that the instability of the socio-political and economic situation, as well as changes in the educational processes, should not influence formation of the personality. The long awaited large "truth" hidden behind the Iron Curtain became problematic as the truth was not clear or undisputable. Unlike reading Soviet pedagogic literature, the reader had to select and form an opinion after the criteria he/she only knew (did not know). Both pedagogical literature and MLO regularly argued about the issues of value. They reconsidered the civic responsibility of individuals and society and rethought learning and child rearing theories and practice cherished in Latvia during the inter-war period and Soviet dictatorship in comparison to the politically free world of new Europe[58] and the concepts that would provide optimal development of the personality in the family. A task was

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[55] J. Anspaks, *Pedagoģijas idejas Latvijā* [Pedagogical ideas in Latvia], Rīga, RaKa, 2003.

[56] Z. Rubene, 'Pedagoģijas zinātne pēc Latvijas neatkarības atjaunošanas' [Pedagogical science after restoration of independence of the Republic of Latvia], in A. Krūze (ed.), *Laikmets un personība. Rakstu krājums* [Era and personality. Collection of articles]*,* vol. 15, Rīga, RaKa, 2015, pp. 105-134.

[57] J. Anspaks, *Pedagoģijas idejas Latvijā* [Pedagogical ideas in Latvia], Rīga, RaKa, 2003.

[58] A. Plakans, *Concise History of the Baltic States,* Cambridge University Press, 2011, p. 490.

brought forth in the entire field of education – preservation of national heritage and transfer of values to future generations, simultaneously bringing Latvia closer to European identity.[59] MLO articles show ambivalent balancing between child rearing that should be conservative, trying to protect core values, but that should also be modern and even futuristic. Not only educational sciences,[60] but also mass media indicated conceptual cancelling of and then gradual regaining of Latvian artefacts of values from oblivion cultivated by the Soviet power. The introductory part of the Yearbook of the beginning of 1990s and later MLO editors continued this direction until 2004 – to restore balance between the nationally general and globally international.

Complexity of the child rearing task in this period of transformation was determined by the hybrid identity of the state and individual, merging the national idealism discourse typical of modernism with democratic multiculturalism propagated by post-modernism.[61] Post-socialism is characterised as open, versatile, and an inescapably indefinite phenomenon. On the one hand, this indefinite situation created almost dimensionless possibilities, but on the other hand, it was connected to the feeling of insecurity in society as the creation of a new social frame, sudden freedom, openness, and the uncertainty related to it was threatening. Society, including families, had acquired freedom from Soviet style socialism but it was placed before a choice to lose it gradually by adopting the thoughts and action models of the Western world uncritically and, again, politicising child rearing to a certain degree. A titanic task was to be done as future possibilities of post-socialism did not yet exist;[62] therefore, they needed to be created and developed by applying one's own capacities, cleverly using what was available and attracting new resources.

[59] J. Anspaks, *Pedagoģijas idejas Latvijā* [Pedagogical ideas in Latvia], Rīga, RaKa, 2003; V. Ūsiņš, 'Latviešu tautas pedagoģijas atziņu nozīme bērna personības veidošanā ģimenē' [Importance of Latvian folk pedagogical verities in development of a child's personality in a family], in S. Kramēna (ed.), *Personības attīstība ģimenē, skolā un augstskolā. Zinātnisku rakstu krājums* [Personality development in family, school and higher education institution. Collection of Scientific Articles], Rīga, SIA Mācību apgāds NT, 1999, p. 90.

[60] A. Krūze, 'Audzināšanas mērķis un ideāli pedagoģiskās domas attīstībā Latvijā' [The objective and models of education in development of pedagogical ideas in Latvia], in *Vispārīgā didaktika un audzināšana. Zinātnisku rakstu krājums* [General didactics and education. Collection of scientific articles], Rīga, SIA Izglītības soļi, 2001, pp. 47-50.

[61] E. Kļave, B. Zepa, 'Modernisma un postmodernisma nacionālisma diskursi nacionālās identitātes skaidrojumā' [Nationalism discourses of modernism and post-modernism in interpretation of national identity], in *Identitātes. Kopienas. Diskursi* [Identity. Community. Discourses], Rīga, Latvijas Universitāte, 2012, pp. 9-26.

[62] I. Silova, 'Globalizācija un postsociālisma pārmaiņas izglītības jomā' [Globalisation and post-Socialism changes in education], in T. Koķe, A. Krūze, D. Markus (eds.), *Apvienotais pasaules latviešu zinātnieku 3. kongress un letonikas 4. kongress. Zinātnisko rakstu krājums CD formātā. Izglītības izaugsmei: pagātne, tagadne un nākotne* [Third World congress of Latvian scientists and fourth congress of Latvian studies. Scientific article collection in a CD format. For educational growth: Past, present and future], Rīga, 2011, pp. 1-9.

The individuality of the child was increasingly highlighted and strengthened by attempts at decentralisation and differentiation.[63] Our study indicates a gradual increase in the necessity for psychological comfort in the family that promoted intellectual and emotional stability and development, mainly for children but also for parents.[64] Authors of pedagogical literature tried to create structural frameworks and family typology by discovering typical traits for each family model and mutual relations between family members.[65] MLO pages revealed those through experiences of celebrity and "ordinary" families that related to the organising principles of the family household and attitudes towards child rearing and formation of mutual relations.

Analysis of sources indicates that with the approach of the new millennium, the roles of families and functions changed. This highlighted the pedagogical cooperation model of a child, mother and father as equal actors. Asymmetry of the family reduced child rearing and support while family members participated in the domestic activities of the family. Decline of the stereotypical approach towards feminine and masculine is also seen in frequent messages about the merging of work and family life in MLO articles: the development of an inclusive environment would secure equivalent integration of both areas in household practice.[66] The message about inclusion of fathers, gradually transfering child rearing responsibilities to both parents,[67] encountered

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[63] J. Anspaks, *Pedagoǵijas idejas Latvijā* [Pedagogical ideas in Latvia], Rīga, RaKa, 2003; A. Vecgrāve, *Kā man saprast savu bērnu* [How to understand my own child], Rīga, Zvaigzne ABC, 1996; D. Lieǵeniece, *Kopveseluma pieeja bērna audzināšanā (5-7 gadu vecumā)* [Holistic approach in parenting (at the age of 5-7)], Rīga, RaKa, 1999; A. Špona, *Audzināšanas teorija un prakse* [Education: Theory and practice], Rīga, RaKa, 2001; A. Šteinberga, I. Tunne, *Jauniešu pašizjūta un vērtības* [Self-awareness and values of the youth], Rīga, RaKa, 1999; Ā. Karpova, *Personība un individuālais stils* [Personality and individual style], Rīga, Latvijas Universitāte, 1994.

[64] I. Kraukle, 'Ǵimenes kā pašregulējošas sistēmas varianti un to ietekme uz bērna personības veidošanos' [Types of a family as a self-regulatory system and its impact on development of a child personality], in S. Kramēna (ed.), *Personības attīstība ǵimenē skolā un augstskolā. Zinātnisku rakstu krājums* [Development of personality in school and higher education institution. Collection of scientific articles], Rīga, SIA Mācību apgāds NT, 1999, p. 90.

[65] Ā. Karpova, I. Kraukle, I. Žogla (eds.), *Ievads latviešu ǵimenes sociālpsiholoǵisko, psihofizioloǵisko un pedagoǵisko īpatnību pētījumā: rakstu krājums* [Introduction into a research of socio-psychological and pedagogical peculiarities of a Latvian family: collection of articles], Rīga, Latvijas Universitāte, 1992; V. Zelmenis, *Īss pedagoǵijas kurss* [Short course in pedagogy], Rīga, Zvaigzne, 1991, p. 213; A. Tabūna, 'Equality Between Men and Women in the Family,' in I. Koroļeva (ed.), *Invitation to Dialogue: Beyond Gender (In)equality*, Rīga, Institute of Philosophy and Sociology, 1997, pp. 287-298; P. Stēnsgorda, *Māte, bērni un tēvs. 16 intervijas ar netradicionālām ǵimenēm* [Mother, children and father. Sixteen interviews with non-traditional families], Rīga, Atēna, 2004.

[66] N. Jansone-Ratinika, *Tēva pedagoǵiskā kompetence mūsdienu ǵimenē* [Father's pedagogical competence in family nowadays], PhD diss., University of Latvia, 2013.

[67] A. Žvinklienė, 'Gender Equality in the Baltic States: Democratisation of Patriarchy,' in I. Novikova (ed.) *Gender Matters in the Baltics*, Rīga, LU Dzimtes studiju centrs, 2008, pp. 73-90; I. Pavlina, 'Vecāku viedokļi par iespējamiem pasākumiem tēvu dalības veicināšanai bērnu aprūpē' [Parents' ideas on possible measures to foster father participation in child care], in I. B. Zariņa (ed.) *Vīrieša loma ǵimenē: Starptautiskās konferences materiāli* [Man's Role in the Family: International Conference Materials], Rīga, LZA Ekonomikas institūts, 1999, pp. 176-181.

contradiction through the traditional family model of one bread-winner as proposed by laws and regulations. In this model, one parent, mostly the father, provided the material resources for maintaining the family, and the primary role of the mother was child care, child rearing, and household chores.[68]

Both MLO and Yearbook indicate a collision of paradigms from intuitive to externally censored "correct – incorrect" towards freedom of expression "corresponding – non-corresponding" balanced with critical arguments. Mass media texts were intertwined with search for balance, and local and foreign experts of various sectors published recommendations for determining or democratising parental behavior. Parents manoeuvered between democracy and authoritarianism in child rearing. Analysis of the MLO Questions and Answers column shows that in the perception of authors and readers, MLO's narrative approach increasingly strengthened the principles of democracy in the mind of readers and encouraged liberalisation. It is also important to note that the cultivated Soviet ideology and political exclusion behind the Iron Curtain limited the individual through centralised obedience enforced by an iron fist but also provided some comfort, which was favourable soil for the development of freedom of choice and critical thinking. Parents were now required to think independently, make decisions, and alter their opinions. Expansion of the information space and expression of freedom alongside confusion also created harsh competition and forced readers to focus more on the quality of media content.[69] Content creators and consumers developed a need for critical competences,[70] something that was being increasingly researched and described in pedagogical literature.

It should be noted that MLO was the first print media devoted to child rearing, and members of society who had previously received only propaganda were eager readers. One of Latvia's most important achievements in its quest for democracy was freeing mass media from government officials and control of news.[71] Content analysis shows that in the early 1990s, Yearbook texts were still didactic and simplistic, and MLO wrote cautiously, indicating that despite the collapse of official censorship, self-censorship – typical of the Soviet Union – still existed. To a certain extent, the articles replicated the pedagogical literature that flourished under Soviet power by discouraging revolution, yet

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[68] P. Eglīte, 'Dzimstība un ģimenes politika Latvijā 1990.–2009. gadā' [Birth rate and family policy in Latvia 1990–2009], *Latvijas Zinātņu Akadēmijas* Vēstis [Latvian Academy of Science News], vol. 65, no. 3/4, 2011, pp. 17-33.

[69] S. Veinberga, *Mediju misija. Preses attīstības tendences Latvijā pēc valsts neatkarības atjaunošanas (1990–2010)* [Media mission: Press development trends in Latvia after the restoration of independence (1990–2010)]*,* Rīga, Zvaigzne ABC, 2010, p. 160.

[70] Z. Rubene, 'Kritiski domājošas personības veidošanās: ieskats pedagoģijas un psiholoģijas teorijās' [Development of a critically thinking personality: Insight into theories of pedagogy and psychology], in I. Žogla (ed.) *Zinātniskie raksti pedagoģijā* [Scientific articles in pedagogy], vol. 641, Rīga, SIA Izglītības soļi, 2001, pp. 243-252.

[71] S. Veinberga, *Mediju misija. Preses attīstības tendences Latvijā pēc valsts neatkarības atjaunošanas (1990–2010)* [Media mission: Press development trends in Latvia after the restoration of independence (1990–2010)]*,* Rīga, Zvaigzne ABC, 2010.

urging evaluation of the existing situation and search for a new path – since regaining independence, the public responsibility of mass media doubled.[72] The change of media narrative and industry literature as well as acquiring pedagogical personnel and revising standard Soviet practice caused difficulties. Creators and developers of "new" educational concepts were also specialists of pedagogy under Soviet rule. They tried to change but were not able to accommodate rapidly.

As the purpose of media and pedagogical literature is to promote child rearing competences of parents, justification and consistency of the child rearing discourse should be especially analysed. Analysis shows that the content of MLO, especially in the 1990s, was still compiled chaotically and interpretation of pedagogical values did not show consistency with pedagogical literature. The purpose of consistency is not to develop a centralised, routine pedagogy but to help parents create systematic and targeted approaches in child rearing. Similarly, the public lacked a *leitmotif* and unified direction after regaining freedom, and the richness of MLO topics and initiatives created difficulties with orientation and systematisation, which did not foster conviction about the purpose of conceptualising pedagogical perceptions and understanding. Although MLO and Yearbook can generally be characterised as media sources with significant communication potential,[73] scrutiny of the articles devoted to child rearing topics lacked the connection of theory with practice and academic validity.

During the 1990s and the start of the 21st century, both Yearbook and later MLO tended to translate articles by foreign experts and consultants without providing information about the field the author represented or why the author was selected, which could have added deeper meaning and substance. Also, fragmented comments about topics sometimes created gaps of information that could develop into misunderstanding of cause and effect. This probably occurred because acquisition of expert opinions in journalism was done not by assessing competence but by ease of access. One cannot deny that editorial post-editing could also change thematic highlights. Similar messages expressed by MLO and Yearbook could occur due to the fact that they were the only sources and had no competition from other publications. Issues of groundlessness and discrepancies were observed in MLO articles until 1996: deficiency of data acquired in Latvia was replaced with translations and descriptions of foreign studies that were not always applicable to Latvian families and their problems.

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[72] A. Dimants, *Pašcenzūra pret paškontroli Latvijas presē. Mediju pētījuma atklājumi* [Self-censorship against self-control in the Latvian press: Discoveries of a media study], Valmiera, Vidzemes augstskola, 2004, p. 115. Available: http://providus.lv/article_files/2102/original/pascenzura_lv.pdf?1343208981 (accessed 17 November 2016).

[73] D. Medne, 'Pedagoģisko vērtību interpretācija žurnālā 'Mans Mazais'' [Interpretation of pedagogical values in magazine 'My Little One'], *LU Raksti. Pedagoģija un skolotāju izglītība* [University of Latvia articles. Pedagogy and teacher education], vol. 781, Rīga, LU Akadēmiskais apgāds, 2012, pp. 174-185.

Disregarding the thread of individualisation through the entire child rearing discourse, media content still showed pedagogical categorisation traits of children, parents, and families, putting specific labels of "right" and "wrong", which sometimes was reflected as an almost irreversible pedagogical "diagnosis".

Both pedagogical literature and MLO narratives identified two contextual contrasts – pedagogical activity canons of biased parents and denials of idealised recommendations, justified by the creation of inferiority complexes in parents as an inescapable side effect. Pedagogical literature and MLO polarised the biological and social impact on the development of children's personalities and their life trajectories. Especially during the 1990s, several articles proposed diametrically opposite notions about the main personality aspects as defined by genes or socialisation and child rearing as the determining factors. This can be explained by the Soviet viewpoint that debunked heredity but which gained increased interest during the post-Soviet era.

Both educational theoreticians and MLO and Yearbook authors increasingly argued that changes in child rearing and educational targets in the family and society made one reconsider new personality upbringing and educational paths. In the early 1990s, the aim of education was to "Create favourable conditions for the growth of a free, creative and cultural person, who is directed towards the continuation of education; promote the creation of a member of a democratic society; and develop a person who is able to independently see and expertly solve life problems and work skilfully in their area on behalf of the state, family, and self."[74] To a certain degree, this concept represents child rearing guidelines in the family as the aim of education should not be delegated only to schools but should be closely tied to family pedagogy.

Pedagogical messages reflected in various academic and popular science sources emphasised cooperation of families and schools in the development of humanity, individualisation, creative expression, democracy, and community principles.[75] In time, most MLO editions emphasised the role of family in the educational pursuits of the child. In addition, studies performed in 1990s identified a correlation between the family and educational achievements of the child, justifying the basic truth of pedagogy that family environment favourably impacts the grades of the child.[76]

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[74] A. Jākobsone (ed.), *Bērni un ģimenes Latvijā 1994* [Children and families in Latvia 1994], Rīga, AS Preses nams, 1995.

[75] A. Špona, *Audzināšanas teorija un prakse* [Education: Theory and practice], Rīga, RaKa, 2001; Ā. Karpova, I. Kraukle, I. Žogla (eds.), *Ievads latviešu ģimenes sociālpsiholoģisko, psihofizioloģisko un pedagoģisko īpatnību pētījumā: rakstu krājums* [Introduction into a research of social psychological and pedagogical peculiarities of a Latvian family: Collection of articles], Rīga, Latvijas Universitāte, 1992; V. Zelmenis, Īss pedagoģijas kurss [Short course in pedagogy], Rīga, Zvaigzne, 1991; Ā. Karpova, Ģimenes psiholoģija [Family psychology], Rīga, RaKa, 2000.

[76] L. Ezera, 'Jaunās paaudzes kvalitatīva attīstība dažāda tipa ģimenēs' [Qualitative development of new generation if various types of families], in *Latvijas sociāli demogrāfiskās attīstības problēmas* [Problems of Latvia's socio-demographic development], Rīga, Latvijas Universitāte,1992, pp. 136-142.

Content analysis show that MLO articles about the physical development and care of children appear more frequently than texts about their psycho-emotional and cognitive development; to a certain degree, these could reduce or encumber parents' options to try to solve all child development needs with the content provided in the magazine.

Most frequent MLO topics featured were about the health of the child and the mother (including pregnancy), family labour, physiological and psychological aspects of the family, challenges of children's behaviour, leisure time of children, extracurricular education and involvement of parents, and changes in extracurricular education because of technology and the increasing popularity of the Internet during the latter half of the 1990s. Various technological effects were viewed in regards to parental child rearing experiences and pedagogy theories, as well as a sub-sector of research of mass media pedagogy,[77] which reduced MLO's information-giving function but increased the role of information classification and analysis.

One of the dominant thematic groups that came up in content analysis of MLO was 'fashion' in a broader sense – pedagogy, toys, clothing, food, even children-parent and partner relations – that used specific canons to prove social belonging in certain social circles, including among progressive thinkers. Although MLO's thematic scope was usually socially practical, the viewpoint gradually expanded. MLO can be considered a valuable source as it was the only publication of its kind. As a significant agent in the discourse of child rearing and the family support system, it can be evaluated ambiguously as content lacked the target-oriented approach to help families choose a suitable child rearing approach to harmonise with everyday activities. On the one hand, it is a testament to the thematic freedom typical of the time, but on the other hand, contradictions in content and conflicting emphases indicate lack of conceptualisation of the discourse of child rearing. In total, sources analysed in the study provided a significant contribution for the development of pedagogical ideas in the family and public from 1990 to 2004.

Conclusion

Post-Soviet discourse can be divided into two stages: the 'post-independence regaining' period until 1991, and the 'Europeanisation' discourse until Latvia joined the European Union in 2004. The Europeanisation discourse formalised orientation towards the unified global and European space that began even before joining the EU while Latvia began fulfilling the requirements for joining the "club". Ideological preconditions at this time reveal two ambivalent trends: society tried to partially restore the patriarchal order of the 1920s–1930s,

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[77] A. Krūmiņa, 'Mediju pedagoģija Latvijā' [Media pedagogy in Latvia], in Z. Rubene, A. Krūmiņa, I. Vanaga (eds.), *Ievads mediju pedagoģijā* [Introduction into media pedagogy], Rīga, RaKa, 2008.

but the course of democracy and emancipation required reformation of the traditional order.

Analysis of sources allowed us to conclude that in comparison to the framework of child rearing and care established and maintained under Soviet rule, responsibility was placed more in the hands of family after regaining independence, i.e. centrally organised and state funded options were reduced. Although many family and child support initiatives that left a positive impact on the rearing of children in the family and quality of children's lives in general were implemented, mistakes were made in the promotion of more successful and sustainable family policies. Results could have been more positive if they had achieved coordinated horizontal cooperation of all involved parties – ministries, government institutions, NGOs and public organisations, and professionals – by determining the unified, long-term investment direction, informing the public of changes in various sectors, and involving people in common tasks. Despite the great value attributed to the family, the state believed that not enough was done to sufficiently protect families.

Sources attest to joint globalisation trends. Gradual reduction of stereotypes and clichés – tough and non-critical, unjustified judgments and actions – allowed the restoration and significance of parental functions in all aspects of life and delegated family rights that were conceptually and practically non-existant under Soviet rule. Also, the improvement of the national support system allowed to strengthen the idea and understanding about the role of new families so that parents could raise their children and also successfully return to their professional life, not only to fulfil professional ambitions but also to provide sufficient support and quality of life for their family.

Estonian School Culture – Endeavor for Learning Organisation

Ene-Silvia Sarv

Abstract. School climate and school culture form an environment for pupil and teacher well-being and development. Part of school culture is the organisational culture of school. Concepts of learning organisation, knowledge creation, and knowledge management are applied to understand differences in school organisational culture as perceived by teachers in a survey conducted in 2004 at Tallinn University within the framework of the project 'School as a developmental environment and pupils' coping.' The project arose from the need to prevent pupils from dropping out of school in Estonia. The main hypothesis was that by becoming aware of and modifying a school's social climate, stakeholders can support, or not, pupils' academic success. Results allowed identification and description of types of schools and teachers in Estonia. The important conclusion of the project was that the type of school culture, especially the school value system and teacher attitudes toward pupils, influence pupils' optimistic acceptance of life, well-being, and academic coping. The type of school known as a "learning developing school" supports pupils in coping the most.

Keywords: school, teacher, learning organisation, school culture

Introduction and conception

Teachers, schools, and pupils are mostly intertwined for nine to twelve years. Teachers and schools preserve and transmit culture, traditions, values, and knowledge. This can be a solid support point or a possible risk factor for children, parents, and society. If school climate and school culture are not perceived as helpful aid by students, the result might be school avoidance and dropping out.[1]

Rapid global changes at the end of the 20th century led to the idea that the era of industrial growth was being replaced by an information society through the "postmodern moment",[2] "knowledge society", "sustainable society", but also by "risk society".[3] Sustainability, lifelong learning, learning organisations and learning societies, and management, creation, and innovative use of knowledge became important as concepts in philosophy and research and as

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[1] V.-R. Ruus, et al., 'Students' Well-being, Coping, Academic Success, and School Climate,' *Social Behavior and Personali*ty, vol. 35, no. 7, 2007, pp. 919-936.

[2] J.-F. Lyotard, *The Postmodern Condition: A Report on Knowledge*, Minneapolis, University of Minneapolis Press, 1989, p. ix; R. Usher, R. Edwards, *Postmodernism and Education*, London, Routledge, 1994, pp. 7-10.

[3] U. Beck, *Risk Society*, London, Sage, 1992.

practice. In this context, emphasis was placed on the changing role of schools and teachers in a knowledge-based learning society.[4]

Sustainability was related to inclusiveness and innovation, taking into account long-term results.[5] From this, it followed that school needed to prepare people for participation in a knowledge-based society.

The above dimensions – inclusiveness and innovation – influenced everyday life in school and the school climate and culture. Continuous and rapid changes challenged the traditional role and nature of school and the heritage of the authoritarian regime. Changes appear in an atmosphere that result from the activities and relationships between teachers, pupils, and school leaders. Concurrently, change appears in documents regulating school life – school curriculum, strategic development plans, job descriptions and rules, and even more so in values and traditions.

School culture is often defined as the carrier of historically transmitted meanings that include norms, values, beliefs, traditions, and myths understood by members within the school community that shape thoughts and activities. The most important areas are educational, pedagogical, learning, and organisational cultures. Aspects such as moral education, a sense of belonging, fraudulent culture, teachers' implicit theories (as part of culture, as mind models) are also distinguished. Simply put, school culture describes both the general in all schools and the school's uniqueness.[6] So, school culture is always at work, either helping or hindering learning. It influences every decision and action, from the leadership style of the principal to the way teachers choose curriculum materials and interact with pupils.

The concepts of school culture closely or partially overlap with the school climate and school ethos. School culture as a concept and phenomenon is a common element in the development of two approaches – cultural (a broad general concept) and organisational (as an institutional, structural, and procedural whole for the purposeful targeting of people).

A special dimension of school culture has been pointed out by researchers and philosophers (e.g. James W. Botkin and Carl G. Jung) – a dark, subconscious "shadow" side: evil, mistakes, fears... This negative side of culture is not only

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4   G. Raagmaa, E. Terk (eds.), *Eesti tulevikustsenaariumid: üleriigiline territoriaalmajanduslik planeering 'Eesti 2010'* [Estonia futures scenario 'Estonia 2010': nationwide economic-territorial planning], Tallinn, Tartu, Eesti Vabariigi Keskkonnaministeerium, Eesti Tuleviku-uuringute Instituut, 1997; K. Loogma, E.-S. Sarv (eds.), *Eesti ühiskond ja haridus – 2015* [Estonia society and education – 2015], Tallinn, Eesti Haridusfoorum'98, Avatud Eesti Fond, 1998; R. Vilu, E.-S. Sarv, 'Kool ja infoühiskonna haridusfilosoofia' [School and the philosophy of information society], in S. Maanso (ed.), *Eesti haridusvalikud XXI sajandi lävel: EHF 1.-3. november 1996: ettekannete ja sõnavõttude kogumik* [Estonia – educational choices at the beginning of 21st century: EEF 1-3 November 1996, presentations], Tallinn, Eesti Haridusfoorum, 1997, pp. 56-68.

5   SHELL, 'Global scenarios 2025.' Available: http://www.shell.com/home/content/aboutshell-en/our_strategy/shell_global_scenarios/previous_scenarios/previous_scenarios_30102006.html (accessed 12.01.2008).

6   H. Beare, B. J. Caldwell, R. H. Millikan, *Creating an Excellent School*, London, Routledge, 1994, pp. 172-179.

hidden but is a taboo that is not recognised, which is preferred not to be seen or spoken about.[7] In terms of sustainability of the organisation and especially its educational consequences, the shadow school culture and negative subcultures deserve serious study and awareness in schools.[8]

The first analysis of the application of learning organisation and school culture ideas in Estonian schools was completed in 2001.[9] Development plans of 60 schools were analysed. Content analysis of structural elements of the development plans provided an overview of all aspects of school development, systematised them, and linked them with the main ideas of sustainability and development of education.

Universal dimensions were used to sketch the model of school types:

- Orientation towards coherence vs. alienation and competition, which simultaneously recognises diversities and different ways of thinking (as a potential origin of creativity); and
- Openness, innovation, level of aspiration and orientation towards humanistic values, i.e. dynamism, creativity, and innovation vs. closure, conservatism, avoiding challenges, orientation for immediate benefit, stagnation, and conservatism.[10]

It should be emphasised that in 2001, school development plans already included aspects of the key areas of learning organisations and knowledge management and viewed teachers as active and involved subjects/agents in school development. Plans continued emphasis on participation and democratisation, which was launched in 1987–1988 and continued in the curricula of 1996 and 2002.[11] Four types of school development plans included winning-competing, value-/human-centered, active learning organisation features, and conservative-formal-passive. Each type took a different approach for a pupil (and teacher) development environment.[12]

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[7] J. W. Botkin, *Smart Business: How Knowledge Communities can Revolutionize Your Company*, New York, The Free Press, 1999, p. 151.

[8] H. Beare, B. J. Caldwell, R. H. Millikan, *Creating an Excellent School*, London, Routledge, 1994, pp. 172-179; D. H. Hargreaves, 'School Culture, School Effectiveness and School Improvement,' *School Effectiveness and School Improvement*, vol. 6, no. 1, 1995, pp. 23-46.

[9] E.-S. Sarv, 'On Structure, Content and Typology of School Development Plans in Estonia,' in S. Priimägi, E.-S. Sarv (eds.), *The Opening World: Changing Educational Environment and Teacher Training*, Tallinn, Tallinn Pedagogical University, 2002, pp. 78-105.

[10] K. Loogma, R. Ruubel, V. Ruus, E.-S. Sarv, R. Vilu, 'Estonia's Education Scenarios 2015,' *The 21st Century Learning Initiative Journal*, May, 1998. Available: //www.21learn.org/test/newslet.html (accessed 18.02.2018)

[11] J. Jaani, 'Õppekavakogemus õpetab' [Curriculum-experience gives a lesson], *Haridus* [Education], 2004, no. 11, p. 14.

[12] E.-S. Sarv, 'On Structure, Content and Typology of School Development Plans in Estonia,' in S. Priimägi, E.-S. Sarv (eds.), *The Opening World: Changing Educational Environment and Teacher Training*, Tallinn, Tallinn Pedagogical University, 2002, pp. 78-105.

In 2004, a complex survey was conducted on coping of Estonian schools, pupils, and teachers.[13] The study used a socio-ecological approach based on theories about the development of pupil and teacher abilities to cope with school conditions[14] and school as a learning organisation.[15] School culture can support or restrict personal development and changes in school that result from internal development or external factors. The survey of pupils, parents, teachers and school leaders included 12% of all (general education) schools in Estonia. The study looked for a deeper understanding about the factors that directly or indirectly influenced pupil development based on teachers' perceptions and practices. Various types of schools were described based on school climate, culture, organisational learning, pupil academic coping skills[16] and well-being, and teacher coping patterns and mind models.[17]

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[13] V.-R. Ruus, M. Veisson, M. Leino, L. Ots, L. Pallas, E.-S. Sarv, A. Veisson, 'Õpilaste edukus, toimetulek ja heaolu koolis' [Pupils' success, coping and wellbeing in the school], in M. Veisson, V.-R. Ruus, T. Kuurme (eds.), *Eesti kool 21. sajandi algul: kool kui arengukeskkond ja õpilaste toimetulek* [Estonian schools at the beginning of the 21st century: school as developmental environment and pupils' coping], Tallinn, Tallinna Ülikooli kirjastus, 2007, pp. 17-58; 'Estonian Schools at the Beginning of the 21st Century. Project *School as Developmental Environment and Students' Coping* (SF0132495s03, leader M. Veisson),' University of Tallinn, 2003–2007. Available: https://www.etis.ee/Portal/Projects/Display/ce8cbd34-12bd-49ff-a5fe-b962449ae6d6 (accessed 25.01.2017); V.-R. Ruus, E-S. Sarv, L. Pallas, 'Relationships Between Schools' Organisational Climate and the Students' Condition at School,' paper presented at the European Conference on Educational Research (ECER), Gent, Belgium, 2007; V.-R. Ruus, M. Veisson, M. Leino, L. Ots, L. Pallas, E.-S. Sarv, A. Veisson, 'Students' Well-being, Coping, Academic Success, and School Climate,' *Social Behavior and Personality,* vol. 35 no. 7, 2007, pp. 919-936; M. Veisson, M. Leino, L. Ots, V.-R. Ruus, E.-S. Sarv, 'Academic Coping of Students,' paper presented at the European Conference on Educational Research (ECER), Crete, Greece, 2004. Available: http://www.leeds.ac.uk/educol/documents/00003895.htm (accessed 15.01.2020).

[14] R. S. Lazarus, S. Folkman, *Stress, Appraisal, and Coping*, NY, Springer Publishing Company, 1984.

[15] P. Senge et al., *Schools that Learn*, London, Nicholas Brealey Publishing, 2001.

[16] The key concept of the project was 'coping.' According to Lazarus and Folkman, 'coping' is understood as cognitive and behavioral efforts of an individual aimed at coping with external and/or internal requirements. Skinner and Wellborn argue that pupils' *academic coping* – the way pupils interpret the challenges, drawbacks and difficulties that arise in the process of learning. The coping categories developed by the authors were based on presumption, that coping (and stress) is affected and develops within the interaction between the individual and environment (school climate, school culture). See M. Veisson, M. Leino, L. Ots, V.-R. Ruus, E.-S. Sarv, 'Academic Coping of Students,' paper presented at the European Conference on Educational Research (ECER), Crete, Greece, 2004. Available: http://www.leeds.ac.uk/educol/documents/00003895.htm (accessed 15.01.2020); R. S. Lazarus, S. Folkman, *Stress, Appraisal, and Coping*, New York, Springer, 1984; R. S. Lazarus, *Emotion and Adaptation*, Oxford University Press, 1991; E. A. Skinner, J. G. Wellborn, 'Children's Coping in the Academic Domain,' in S. Wolchik, I. Sandler (eds.), *Handbook of Children's Coping: Linking Theory and Intervention*, New York, Plenum Press, 1997, pp. 387-422.

[17] M. Veisson, V.-R. Ruus, T. Kuurme (eds.), *Eesti kool 21. sajandi algul: kool kui arengukeskkond ja õpilaste toimetulek* [Estonian school at the beginning of the 21st century: School as developmental environment and pupils' coping], Tallinn, Tallinna Ülikooli kirjastus, 2007.

Theoretical justification and methodology is presented briefly and explanation and research findings are derived mainly from teacher surveys.[18]

School as a developmental environment – organisational culture

To what extent do schools, as learning organisations and supporters of the development of pupils, differ because of the experience and knowledge of teachers? By focusing on school from the teacher's perspective, we can highlight at least three views.

School as a whole organisation, as a learning and developmental environment for both the teacher and the pupil. For the teacher, this environment is related to professional development and coping, development of individual and collective knowledge, curriculum, and monitoring and supporting pupil development. The concepts of learning organisation[19] and knowledge creation[20] are central.

Perception and awareness of pupils and their problems by teachers. The child-centred concept, including pupil learning and democratic participation was a central element of school reform in the 1980s and 1990s and part of the vision of the Estonian national school.[21] Perception of pupils and their problems is part of the teacher's mental model in Senge's theory.[22]

Teachers as supporters of pupil development, especially academic success. School, it climate and culture, is a support system for the development of the pupil. Perception and awareness by teachers, the nature of cooperation of teachers (supportive or punitive), and the school's 'self-concept' shapes the pupil's developmental environment and cultivates various active or passive coping strategies. The formation and change of school climate and culture are areas of development of the school as a learning organisation.

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[18] E.-S. Sarv, Õpetaja ja kool õpilase arengu toetajana. *Õpetaja enesest ja koolist* [Teacher and school as supporters of pupil development. Teacher about her/himself and about school], Tallinn, Tallinna Ülikool, 2008.

[19] P. Senge, *The Fifth Discipline. The Art and Practice of the Learning Organization*, New York, Doubleday, 1990; V. J. Marsick, K. E. Watkins, 'Demonstrating the Value of an Organization's Learning Culture: The Dimensions of the Learning Organization Questionnaire,' *Advances in Developing Human Resources*, vol. 5, no. 2, 2003, pp. 132-151.

[20] I. Nonaka, 'The Knowledge Creating Company,' *Harvard Business Review*, no. 9, 1991, pp. 96-104; I. Nonaka, H. Takeuchi, *The Knowledge-Creating Company: How Japanese Companies Create the Dynamics of Innovation*, New York, Oxford University Press, 1995.

[21] E. R. Gretchkina, et al., 'Na puti k novoi shkole: opyt perestroiki narodnogo obrazovanija v ESSR' [On the way to a new school: the experience of restructuring the national education in the Estonian SSR], Moskva, Pedagogika, 1988, p. 220; E-S. Sarv, 'The "Condition of Postmodernism" and Changes in Estonian Education 1987–1997,' in A. Liimets (ed.), *Integration und Integrativität als Probleme in der Erziehungswissenschaft*, Berlin, Wien, New York, Peter Lang, 2001, pp. 135-152.

[22] P. Senge, *The Fifth Discipline. The Art and Practice of the Learning Organization*, New York, Doubleday, 1990; P. Senge, et al., *Schools that Learn*, London, Nicholas Brealey Publishing, 2001.

The soft systems view[23] has been chosen for the general methodological approach, which is intrinsically close to the ecological view.[24]

From the point of view of a systems approach, there are significant differences between teachers in their perception of pupils, school as an organisation, and school as a developmental environment for pupils. Additionally, there are significant differences between school cultures as learning and knowledge management environments. It is necessary to describe the situation of Estonian education from the teacher's point of view to discover typology of schools.

Nonaka and Senge do not view an organisation as a machine, but rather as a living organism that, quite similar to individuals, can have a collective identity and goals. It is an organisational self-consciousness – a shared understanding of what the organisation is working on, where it is on the road, in which world it wants to exist, and most importantly about how it intends to transform its perception of the world into reality.[25]

The main approaches to learning organisations are Senge's future vision of the system;[26] Pedler, Burgoyne, and Boydell's [27] learning-focused; Garvin, Goh's[28] strategic; and Watkins and Marsick's[29] integrated approaches. All approaches can apply to schools, but we consider Senge's model as most practical. It addresses the features of school and received attention in the 1990s and 2000s in Estonia.

It is important to note that systems theories scholars emerged in the Soviet Union. In Estonia, Heino Liimets[30] developed the most influential approach to

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[23] P. Checkland, J. Schores, *Soft Systems Methodology in Action*, Chichester, Wiley, 1990; C. W. Churchman, *The Design of Inquiring Systems: Basic Concepts of Systems and Organiza ization*, New York, Basic Books, 1971; L. Bertanalaffy, *General System Theory*, New York, Braziller, 1968; C. Argyris, D. A. Schön, *Organizational Learning*, Reading, MA, Addison-Wesley, 1978; P. Senge, *The Fifth Discipline. The Art and Practice of the Learning Organization*, New York, Doubleday, 1990.

[24] U. Bronfenbrenner, 'Developmental Ecology Through Space and Time: A Future Perspective,' in P. Moen, G. H. Elder, Jr. K. Lüscher (eds.), *Examining Lives in Context*, Washington, DC, American Psychological Association, 1995, pp. 619-647; R. H. Moos, *The Human Context: Environmental Determinants of Behavior*, N.Y., London, Sydney, Toronto, John Wiley & Sons, 1976.

[25] I. Nonaka, 'The Knowledge Creating Company,' *Harvard Business Review*, no. 9, 1991, p. 103.

[26] P. Senge, *The Fifth Discipline. The Art and Practice of the Learning Organization*, New York, Doubleday, 1990.

[27] M. Pedler, J. Burgoyne, T. Boydell, *The Learning Company: A Strategy for Sustainable Development*, New York, McGraw-Hill, 1991.

[28] D. Garvin, 'Building Learning Organizations,' *Harvard Business Review*, vol. 71, no. 4, 1993, pp. 78-91; S. C. Goh, 'Toward a Learning Organization: The Strategic Building Blocks,' *S.A.M. Advanced Management Journal*, vol. 63, no. 2, 1998, pp. 15-20.

[29] V. J. Marsick, K. E. Watkins, 'Demonstrating the Value of an Organization's Learning Culture: The Dimensions of the Learning Organization Questionnaire,' *Advances in Developing Human Resources*, vol. 5, no 2, 2003, pp. 132-151.

[30] Heino Liimets (1928–1989) – Estonian educational scientist, lecturer in logic and psychology, founding member of the Academy of Pedagogy of the USSR, Honorary Doctor of the University of Helsinki and Honorary Doctor of Tampere University. See H. Liimets, 'Õpilase isiksuse areng ja integraalne didaktiline süsteem' [Development of pupil's personality and the integral didactic system], *Nõukogude Kool* [Soviet school], vol. 6, 1982, pp. 16-21; H. Liimets. *Kak vospityvaet*

the system of child environment and development as a whole. His approach was particularly concerned about the perceptions and activities of the teacher. The school as an organisation was not discussed in great detail at the time.

Nonaka and Takeuchi's knowledge management theory and creation of tacit and explicit knowledge provides conceptual support for the pursuit of complex enterprises with high levels of innovation. From this point of view, teaching and learning in school is the processes of knowledge circulation and/or creation: knowledge acquires new aspects, passes through different states, and passes from person to person, group, community, organisation, etc.[31]

Senge's theory of learning organisation is based on the understanding of the organisation as a dynamic system that is interconnected and in which "five disciplines" of development/learning are perceived – shared vision, personal mastery, development of mental models, teamwork and team learning, and use of systems thinking.[32]

Shared vision is a shared understanding by the members of the meaning and objectives of their activities in an organisation from a distant time perspective. Shared understanding is based on the integration of the individual, group, and the organisation's visions. In Estonia, the culture of vision-creation evolved from two factors: 1) the liberation of schools from ideology and bureaucracy pain from 1987–1996 during Estonian education renewal and 2) the 1996 school Curriculum (1996) and the establishment of a school development strategy plan in 2000. Both formulated the school mission and vision through a stakeholders' agreement.

Personal mastery is the ability to successfully cope with professional activities as well as activities in private life that affect professional practice (e.g. time factor management, recovery, and self-development). Professional mastery of the teacher includes methodological skills required in the contemporary classroom and a broad range of collaborative and communication skills. Pupil observation, peer monitoring, research, and reflection skills are also indispensable.

Mental models require knowledge of one's self and one's peers. Mental models of the members of the organisation are part of the organisation's culture. Mental models focus on awareness of attitudes, perceptions, values, and include reflection and research and attitudes towards them. Mental models are usually not expressed. They work below the level of awareness and often hinder change. One of the aspects of the teachers' mental models is the perception of the pupil, i.e., the imagination of what the pupil is (or 'pupil picture') as well as models of values and 'correct' teaching-learning behavior.

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process obučenija? [How the teaching-learning process educates?], Moskva, Znanije, 1982; H. Liimets, 'Iseregulatsioonilt eneseregulatsioonile' [From (spontaneous) self-regulation to intentional self-regulation], *Nõukogude Kool*, 1983, no. 11, pp. 18-20.

[31] I. Nonaka, H. Takeuchi, *The Knowledge-Creating Company: How Japanese Companies Create the Dynamics of Innovation*, New York, Oxford University Press, 1995.

[32] P. Senge, *The Fifth Discipline. The Art and Practice of the Learning Organization*, New York, Doubleday, 1990, p. 150; P. Senge, et al., *Schools that Learn*, London, Nicholas Brealey Publishing, 2001, p. 60.

Learning in teams results in mutual enrichment (learning from one another) and is a way to develop a shared vision and mental models. Through dialogue, discussion, and more complex cooperative methods, groups transform their collective thinking, learn to mobilise energy and deeds to achieve common goals, and highlight knowledge and capabilities that are greater than the sum of individual members' knowledge and abilities. Formal and informal groups in the school organisation and group dynamics are important for the growth of the organisation's capacity (learning, creating a common vision, curriculum development, etc.), as well as for the membership and recognition of the needs of members of the organisation. Schools have formalised structures, such as classes and methodological committees that work spatially together for a long time, but often they do not form a real learning/research team but are rather a place for coordination of short-term individual activities. It is also important to understand that in a group, there is intensive knowledge circulation and knowledge creation. This process also involves reflection and meta-consciousness, the level of which depends on the group's level of trust and development of the group as a micro-system. In schools, reflective teamwork and learning groups form the basis of development.

The development of systems thinking required consideration of the past-present-future dimension, the local level (class, school, or subject matter), and the global level (meanings and effects of an individual phenomenon and activity in the context of a society or a person's life on a local and global scale). The improvement of systems thinking means a) growing theoretical competence (the body of theory – theoretical, conceptualized, and conscious perceptions); b) feedback on activities, and c) complexity, i.e. awareness of the system's inherent internal tendencies and the external context that lead to the growth or stability of the system/organisation over time. Systems thinking in the context of schools must take into account the dynamic and interactive components of pupils, teachers, parents, the class-community, the school as a whole, and individuals. As early as the 1980s and 1990s, Slaughter and Beare emphasised the development of future and systems thinking abilities of the teacher. In the case of the individual, systems thinking also means shifting from 'self-level' to 'our-level'.

Senge's five key areas can be considered aggregate features of learning organisations. Measuring their qualitative 'level' is complicated, but their description can provide an image of a specific learning organisation.

Using the above, general fields and features of the school as a knowledge-seeking learning organisation were derived and covered by combinations of questions and statements in questionnaires for teachers, but partly also for pupils, school leaders and parents as presented in Table 1.[33]

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[33] E.-S. Sarv, Õpetaja ja kool õpilase arengu toetajana. *Õpetaja enesest ja koolist* [Teacher and school supporting pupils' development. Teacher about her/himself and about school], Tallinn, Tallinna Ülikool, 2008, pp. 34–35.

Table 1. **Features of school as a learning organisation**

Key features	Content/characteristics
Field I – Reflection and research	
1. Teacher reflection and research	Self-reflection, self-analysis, the reflection of pedagogical activity at individual pupil and at the class level, and level of research
1.A. Monitoring	Level of monitoring and analysis systems at school
Field II – Key areas of the learning organisation	
2. Teacher's personal mastery	General professionalism of teaching (methodological diversity, and compliance with curriculum, syllabus, and development plan) Level of development in teacher self-assessment
3. Teacher's mental models	Teacher values, motivational orientation, readiness for innovation and self-independence, and level of development Wider approach also includes teacher concepts of humans and of learning
4. Team learning and teamwork	Level of formal and informal cooperation and teamwork
5. Shared vision	Existence of common, shared perspectives (vision, mission), degree of acceptance and realisation of educational goals
6. Systems approach	Level and development of future-oriented cooperation, both in terms of the school's main objectives and also in support of individual zones of proximal development in pupils Local and global aspects
Field III – School climate and culture	
7. Perceptions of management by the teacher	Level of innovation and sustainability of democratisation Organisation of school life in terms of leadership
7.A. Cultivating consensus and common values	Level of shared understanding (including absence of conflict, jealousy, etc.) and level of acceptance of shared values and their implementation
8. Curriculum	Participation in development process of curriculum and school strategic plan Adoption of the basic ideas and requirements of the curriculum and development plan Convinced of their fulfillment
9. Satisfaction and dedication to teacher work	Level of satisfaction, independence, and commitment
Field IV – Knowledge-management, knowledge-creation	
10. Cooperation	Degree of teacher-perceived cooperation (including communication of information), togetherness (including confidence), and of support among teachers at the school level, individual pupil, and class (or community).
11. Interaction	Degree of knowledge circulation between teachers and of knowledge creation at the school level – joint participation in work on curriculum and strategy plan development, mutual learning-teaching – work with individual pupils and with the class as a whole
12. Information flow	Formal level of information distribution, sharing in school
13. Innovation and recognition, appreciation	Support, recognition, and appreciation of innovation, research (knowledge creation) and active information seeking

The common goals, culture and spirituality of the school as a community and as an organisation are shaped and realised through the values cultivated in school. At the level of the individual, they are part of the mental models. At the community level, aspects of school culture occur both in a formal setting (lessons, teachers' meetings) and also through informal communication and assessments.

Survey sample and methods

The research was part of the research project 'School as a developmental environment and pupil coping' that gathered data on various aspects of school life from the main stakeholders – pupils, parents, teachers, and school leaders. The purpose of the research was to clarify what pupil groups are at risk and why.

Analysis of the data sought to find discover what are the strategies and perceptions of the school and teachers about school climate and culture and how do schools and teachers differ as supporters of pupil development and coping. School is a learning organisation and agency for influencing pupil development.

The teacher questionnaire use the Likert scale (1 – completely disagree, 2 – rather disagree, 3 – more or less agree, 4 – completely agree), and statistical processing of the data used data processing package SPSS 14.0, SPSS 11.0, and MS Excel. Features were derived from the coefficient of validity (Cronbach's alpha) of at least 0.67. Component analysis was used to determine the role of the selected questions in this indicator.

The statement were worded in such a way that acceptance would refer to the desired, positive direction of the fundamental dimensions mentioned in Table 1.

For mapping schools, the ranking of schools was based on an average of the features, typology of teachers, and cluster analysis of schools. The sequencing method (based on teachers' average answers) allowed ranking of schools for multiple aggregates. School rankings were summarised and based on the sum of place codes.

In 2004 during the first phase of the study, teachers (*n* = 623) completed self-assessing questionnaires. The survey involved approximately 12% of general education schools and 4% of teachers. The results were generalised for schools and teachers.

In summary, the correlation between all 13 characteristics mentioned in Table 1 was statistically significant (<0.01). Such a strong correlation means that the set of characteristics was comprehensive and, despite the differences between schools and individual teachers, groups of teachers can be used to describe and study the school system and individual schools.
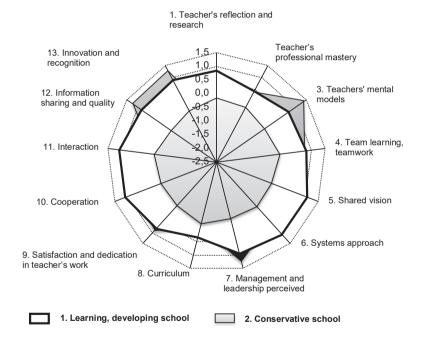
Findings

Typology of school as a learning organisation. To analyse school typology, 49 schools, representing each of the counties, cities, stronger and weaker schools (according to three years results of state examinations), and schools working in Estonian, Russian and in both languages with six to 29 respondents and 587 teachers participated.

Based on the characteristics of the culture of learning organisation, a 4-group distribution was sufficient: learning, development-centered schools (25%); conservative schools (59%); schools with poor learning ability (8%); and management-centered schools (8%). The general description of these groups is illustrated in Figure 1 and Figure 2.

It became clear that in almost every feature, there were differences between schools in Tallinn and rural areas and schools teaching in Estonian or in Russian. This indicates specific differences in school culture. However, the general typology does not show clear divisions by language or school location.

Figure 1. **Grouping of schools as knowledge-managing, learning organisations. Learning, developing schools and conservative schools.**

Learning, development-orientated schools (25%, Figure 1). These schools were characterised by a relatively uniform picture of positive standardised mean values for all features. In seven indicators, the mean was the highest value compared to other clusters. Compared to other features, the value of teacher

personal mastery, mental models, and curriculum is slightly lower. This refers to some degree of self-criticism or uncertainty (as compared to other features) or higher demands in the view of teacher skills. At the same time, there are features of the learning organisation and knowledge management such as the shared vision and systems approach (view of the future and its transfer to the learning process and common understanding of educational issues) and cooperation and interaction (active position in development of the school and in development of self and pupils) which had a Zscore >1. Teachers rated themselves higher as reflective and researching practitioners than in other groups. Therefore, this group of schools can be characterised as learning, development-oriented and well and evenly developed in all fields and believable as child-centred schools.

This group included some special needs schools, one private school, four Tallinn secondary schools (including an "elite" school), two rural schools, and four Russian-language schools. This showed that child-centered learning schools could evolve in a variety of regional environments and have a various pupil contingents.

Conservative schools (59%, Figure 1). This school group is by far the largest: it also determines the zero level for each attribute and aggregate character by which other schools are rated/described.

The picture of a development-oriented and conservative school group shows that both groups are relatively similar to a 'pattern'. However, the first type of schools is characterised in all areas and in all the attributes of higher in Zscores unlike the other groups of schools. This means that conservative schools have lower beliefs, positivity, satisfaction, dedication, self-esteem, and cooperation as illustrated in Figure 1 and Figure 2. We can, therefore, speak about the culture of a 'broad' and a 'poor' school. Unfortunately, the overwhelming majority of the schools were 'poor'. Often, some of these schools had a school-climate perceived by pupils as indifferent or formal.
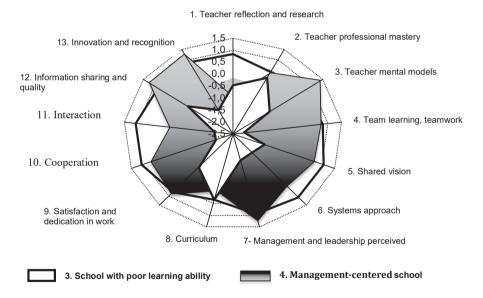
Schools with poor learning abilities (8%, Figure 2). They were viewed as outsiders, conservative and relatively controversial schools, characterised by significantly lower averages in most characteristics than in corresponding indicators of other schools. Teacher personal mastery and curriculum-work was average. Team learning, collaboration, and interaction indicators were particularly low, indicating that in these schools, the level of pre-requisites for learning organisation and knowledge management and knowledge circulation was very low compared to other schools and insufficient to trigger or achieve profound changes on its own. Nevertheless, teachers appreciated their ability to meet curriculum and development plan requirements at a relatively high level. These schools could be considered schools at risk, based on teacher attitudes towards development and change. In these schools, changes took place through external rather than internal processes. In the terminology of the knowledge-driven learning school, these would be conservative schools with relatively poor learning ability. Because teachers in these schools perceived management aspects as very weak (no participation and no positive feedback), these schools could be considered insufficiently guided and managed.

To achieve real change in these schools, it is possible to rely on the areas perceived by the teachers themselves to become stronger. For example, in one school, the teacher had a personal mastery and faith in fulfilling the curriculum, and in another school – a self-concept related to the study and development plan and future optimism. Some schools had strong reflection and research areas, which is a good basis for the right steps for change.

Nevertheless, a deeper change in mentality and management change seems necessary to increase the ability of these schools to develop. There is also a need for internal and external training to address schools' actual problems – incapability of school as an organisation. The latter should be geared towards teamwork and cooperation skills and the specificities of the school in other areas.

Governance/Management-Centered Schools (8%, Figure 2). Schools in this group are learning-centered with teacher-friendly organisation. Particularly high were four characteristics: teacher mental models, perceptions of management, information and innovation, and recognition. Teachers' personal mastery, teamwork, and collaboration, satisfaction and dedication to teacher work was at the same level of the conservative school group. However, teacher involvement in reflection and research was much lower than in the conservative group.

Figure 2. **Grouping of schools as knowledge-managing, learning organisations. Schools with poor learning ability and management centered schools.**

Teachers of management-centered schools considered school innovative. They perceived themselves as recognised, participatory, and autonomous and were satisfied and committed: these were schools with a school culture favorable

to teacher development. However, there were certain disturbances in the field of interaction (active cooperation between teachers for the benefit of pupils and in school and curriculum development aspects). Particularly critical was the state of reflection and research for teachers in this group perceive, which, compared to others, was very weak. This referred to either strong self-criticism or self-centeredness. Regardless, the importance of intensive development and training can be recognised here. From the point of view of the school, this was a well-managed, perhaps even hierarchical and authoritatively leader-based school.

The group of management-centered schools included basic and secondary schools, city and rural schools, and a private and an elite school. These schools showed high satisfaction towards the director (3.88–3.25 in a 4-point system; the average is 3.21).

It should be noted that the inclusion of stronger or weaker schools, based on results of examinations, is not directly related to the fact that the school has stronger or weaker learning cultures (as perceived by the teachers).

Another part of the 2004 study distinguished schools according to teacher mental models and aspects of school-culture and school-climate derived from those models[34] into four types of schools:

- schools with a positive pupil picture and cooperative orientation of teachers – 30%;
- neutral, passive schools – 47%;
- schools with a conflicting pupil picture. There are some indicators of child-centredness, but in general, schools are oriented towards the individual work of the teacher – 9%;
- schools with a pessimistic pupil view, focused on an individual teacher – 13%.

Typologies of schools and teachers according to mental models were described.

The typology of schools from teachers' perspectives of learning organisational culture was connected to the typology of school social climate as perceived by pupils – pupil-hostile; formal-cold; pupil-friendly and demanding; and mediocre.[35]

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[34] E.-S. Sarv, Õpetaja ja kool õpilase arengu toetajana. *Õpetaja enesest ja koolist* [Teacher and school supporting pupils' development. Teacher about her/himself and about school], Tallinn, Tallinna Ülikool, 2008; E.-S. Sarv, M. Leino, L. Ots, L. Pallas, 'Teacher's Views of Students in Estonian Schools,' *The International Journal of Learning*, vol. 15, no. 9, 2008, pp. 169-182.

[35] V.-R. Ruus, et al., 'Õpilase edukus, toimetulek ja heaolu koolis' [Pupils' success, coping and wellbeing in the school], in M. Veisson, V.-R. Ruus, T. Kuurme (eds.), *Eesti kool 21. sajandi algul: kool kui arengukeskkond ja õpilaste toimetulek* [Estonian school at the beginning of the 21st century: school as developmental environment and pupils' coping], Tallinn, Tallinna Ülikooli kirjastus, 2007, pp. 43-51. By the request of the school director, researchers did the detail analyses of the school's culture and climate and pupils coping. Usually, the "school picture" was presented at teachers' meeting and used as the basis of the new development plan.

An interesting contradiction was discovered. Some schools were relatively well-advanced in most or in all of the teacher-based characteristics, but pupils perceived them as unfriendly and cold; they were not happy. This intriguing aspect of school cultures generated some controversial questions and assumptions[36] and needs further research.

Conclusions and discussion

Alongside the underestimation of 'soft' values such as creativity in general school culture, there were clear signs of the inadequacy of the principle of equal opportunities, as typologies showed.

When approaching the school as a learning institution, there was a striking difference between schools and the school communities in a collaborative culture. In only a few schools was teamwork culture sensed by all teachers and school staff.

The Estonian study shows a clear relationship between the pupils' feelings and coexistence in corresponding schools, and knowledge-creative, learning school organisational culture and teacher competencies, as some researchers have shown earlier.[37] Therefore, the internal culture and climate of the school – trust, justice, tolerance, and verbal culture – should be further analysed and evaluated, and a great deal of effort is needed to keep the school climate healthy.

The actual school climate and culture can be assessed and understood through systematic research and monitoring of many aspects of school life. The higher the level of systems-thinking among teachers and school leaders, the more adequate the research. Unfortunately, an atmosphere that supports teacher reflection and research was unanimously attributed to teachers in every fourth school only. Nevertheless, 95% of the respondents thought they had enriched their experience through interaction with other teachers.[38] This indicated that teachers felt the culture, atmosphere of learning, innovation and mutual enrichment in schools. But, there is marked polarisation between schools in this area. In some schools, learning and exploration are a part of school culture, but in others, the teacher-researcher often perceives him or herself as a first-aid medic.

The teacher's interest in researching topics such as active learning, alternative pedagogy, integration, special education, his/her subject, methodology, and

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[36] V.-R. Ruus, E-S. Sarv, L. Pallas, 'Relationships Between Schools' Organisational Climate and the Students' Condition at School,' paper presented at the European Conference on Educational Research (ECER), Gent, Belgium, 2007.

[37] A. Hargreaves, L. Earl, S. Moore, S. Maning, *Learning to Change: Teaching Beyond Subjects and Standards*, San Francisco, Jossey Bass, 2001; D. H. Haregraves, 'The Knowledge Creating School,' *British Journal of Educational Studies*, vol. 47, no. 2, 1999, pp. 122-144.

[38] L. Pallas, 'Kooli õpikeskkond ja õpilaste toimetulek. Ankeet õpetajale. Tabelid' [School as learning environment and pupils' coping. Teacher survey. Tables.], CD-room in E.-S. Sarv, *Õpetaja ja kool õpilase arengu toetajana. Õpetaja enesest ja koolist* [Teacher and school as supporters of pupil development. Teacher on her/himself and on school], Tallinn, Tallinna Ülikooli kirjastus, 2008.

pedagogy correlated positively with the teacher's methodological experience – even more so with the teacher's degree of commitment. There was also a high correlation between research, educational interest, and how often the teacher spoke with pupils about self-development and the future.

These aspects are the intertwining of collective atmosphere and governance structures – school culture and organisational culture – and the teacher's own professional mastery and personal qualities. And no doubt, in each school there are those who prefer routine, stress-free, smooth situations and perceive innovations and challenges as disturbing and tedious. The components of joy, satisfaction, and happiness are related to physical well-being, the absence of negative emotions, and meaning-wealth.[39]

It is important to note that according to some researchers, the teacher is a relatively conservative and not too creative learner, oriented toward joint activities – even during initial teacher education.[40] Only about one-third of teachers working in general education have the social readiness to adapt and innovative approach or are innovative in their pedagogical work.[41] On the other hand, a large number of teachers have quickly acquired computer competences and can successfully adapt to new opportunities at school such as e-schools. This refers to the general willingness and ability of teachers to learn.

Conclusion

The overall typology of schools shows that a group of schools that is more successful or more positive in all areas is distinguished. However, this group is far from being just the 'elite' schools, as one might expect. No schools with a positive child-attitude had learning disabilities as the learning organisation. The requirement by the national curriculum to create school curriculums and school development plans in cooperation with stakeholders has forced schools to also learn. Approximately half of the schools are capable of learning: some of the elements of this culture are already there, but schools that are poorly managed need external help.

Although distribution of schools of this nature may seem to be quite trivial in the final analysis, we have mapped a great number of schools and can describe schools and aspects of school culture based on a large number of features. Moreover, this analysis offers schools the opportunity to create mapping either by using a questionnaire or as part of professional development.

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[39] R. Carter, *Mapping the Mind*, Los Angeles, University of California Press, 1998, p. 103.

[40] E.-S. Sarv, 'Õppimine eesti õpetajate ja üliõpilaste arusaamas 1999. a. ja õppekava' [Learning in the understandings of Estonian teachers and pupils in 1999 and the curriculum], in H. Heinla (ed.) *Haridus ja sotsiaalne tegelikkus* [Education and social reality], Tartu, Tartu Ülikooli Kirjastus, 2000, pp. 193-205.

[41] S. Kera, 'Õpetaja sotsiaalne valmidus kasvatuse eeldusena' [Teacher's social readiness as a prerequisite for education], *Tallinna Pedagoogikaülikooli toimetised. Humaniora A9* [Proceedings of Tallinn Pedagogical University. Series *Humaniora* A9], Tallinn, 1998, pp. 110-125.

Understanding differences in school-cultures allows more precise strategic planning of education on all levels from the pupil to the school and to the nation.

There is also a lack of development of a vision through different organisation levels and working groups. This results in the strength of some areas, the weakness of others. The overview and coordination of the value chain, value network, or hierarchy is poor.

In many schools, individual success, individual failure, and teaching of subjects separately predominates in place of a systems approach. This means strengthening intra-school competition (although both school leaders and teachers declare cooperation), which also affects pupils. So, the school will indirectly shape society over the next decades as a competitive society.

To become a learning and knowledge-creative school and survive as such often requires analysis and re-development of existing school culture. A democratic and human(istic) society needs a democratic and human-centered school culture.

Teacher Image in Latvian Primary School Textbooks

Baiba Kaļķe

Abstract. Today, mass media is the most important creator of public opinion, and school textbooks are part of this. On the one hand, textbooks form student attitudes towards the learning process, and the teacher is the key figure. On the other hand, textbooks are a historic source that depicts pedagogical practices of any given era. The purpose of this study is to determine how the teacher is pictured in primary school textbooks in Latvia during the transition period from authoritarianism to democracy. My sources were 30 text-books in which the teacher was identified in 28 images and 36 texts. Teacher images were studied using the following: gender, age, body type, hairstyle, clothing, footwear, accessories, facial expressions, gestures, activities, and personality traits. Teacher image in textbooks is not showy, most likely to adhere to stereotypes cultivated by the middle class for whom modesty is an important moral virtue. No changes were observed in the professional activities of teachers under democracy requirements, i.e., teachers did not cooperate with pupils during the study process. This research demonstrates that teacher images depicted in primary school textbooks have not radically changed since the Soviet dictatorship, indicating that it is not likely that radical changes in teaching practices occured.

Keywords: teacher image, textbook, primary school

Introduction

Since the 1990s, massive changes have taken place in Latvia, altering completely the social, political, and economic structure of society. Within the context of general reforms, change was expected in education as well: transition from passive to active students in the pedagogical process, authoritarian to democratic teachers, reproductive action to creative activity, control to supervision and evaluation, and administration to management.[1] In line with the shift of the pedagogical paradigm, the Latvian teacher was also expected to change.

There are many phenomena in the world that influence perception, thinking processes, viewpoints, and behaviours. Today, mass media is one of the most important creators of public opinion: "Mass media becomes a medium when it starts telling stories, and these narratives become especially influential when we can relate our interests, needs, and moral narratives with these stories. Mass media is a magnifying glass that expands the borders of our imagination,

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[1] S. E. Fjelds, *No parlamenta līdz klasei. Ceļš no likumdošanas līdz labai skolai* [From parliament to classroom. Road from legislation to a good school], Rīga, Rīgas pilsētas Skolu valde, 1998, p. 58.

provides new insights on the dominant culture, and offers understanding of good education, its modern content and vision."[2] Various lifestyles and cultural artefacts important to social groups are transferred with the help of media. Mass media is the creator of identity, and it also acts as an identity's "voice". The most important media at school is the textbook.

Textbooks, as media, have no feedback from the student: they are capable only of one-way communication. The recipient of information transmitted through this media is passive. Passivity is expressed in that the student is not able to impact the content and form of the information. Information transmitted through textbooks is a ready, finished product.[3] Textbooks form student attitudes towards the study process and the teacher as its key figure, but textbooks are also a source of history, reflecting pedagogical practices of a particular era. The purpose of this study is to determine what is the image of the teacher depicted in primary school textbooks in Latvia during the "new era" from 1991 to 2004.

My research sources were 30 primary school textbooks published in Riga from 1986 (several textbooks were prepared under Soviet rule, but republished in independent Latvia) until 2004. After 1991, textbooks for particular subjects and educational levels were usually developed by one author or a group of authors; for example, Latvian language textbooks were compiled under the supervision of Zenta Anspoka. Therefore, to a large extent, the values expressed in textbooks of this period were dependent on a small number of authors, including illustrators. The perceptions of these people could directly influence the users of these books – students.

For the most part, we can find images of the teacher in Latvian language and maths books through pictures (drawings and photos) and text (excerpts from literature, anecdotes, exercises, various examples related to language studies). In 30 textbooks, the teacher was identified in 28 images (7 of them photos) and 36 text excerpts.

Studies of the visual image of the teacher reveal the author's perception of the person; the researcher also interprets this information. Understanding and explaining the image of teacher can be a complicated process that is possible to do from various perspectives and in different contexts.[4] At first, the textbooks speak to students with the help of images – first they "see" the teacher. Gasparini and Vick state that understanding a visual image requires the same type of

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2   S. Austruma, 'Masu mediju patērnieciskie naratīvi mācību saturā' [Mass media narratives of consumerism in the study content], in *Latvijas Universitātes raksti. Pedagoģija un skolotāju izglītība* [Scientific papers University of Latvia. Pedagogy and teacher education], Rīga, Latvijas Universitāte, 2012, p. 52.

3   A. Krūmiņa, Z. Rubene, *Ievads mediju pedagoģijā* [Introduction to media pedagogy], Rīga, Raka, 2008, p. 207.

4   I. Ķestere, B. Kaļķe, 'Latvijas skolotāju vizuālais tēls Eiropas skolēnu perspektīvā' [Visual image of Latvian teachers from the perspective of European students], *Latvijas Zinātņu Akadēmijas Vēstis* [News of the Latvian Academy of Science], no. 1/2, 2014, p. 57.

literacy skills as reading written text.[5] As an image, the teacher is presented in textbooks through various types of text, which I analysed considering Mahamud's recommendations in the study of school textbooks.[6] I also refer to Marshall[7] and Rousmeniere[8] on visual sources and Weber and Mitchell about teacher image.[9] Quantitative and qualitative components of teacher image developed by Novoa[10] and Vick[11] were considered, as well as the studies of Latvian authors on teacher image.[12]

Characteristics of the visual image of the teacher

General image of teacher. Gender. In total, teachers are mentioned in primary school textbooks 64 times: in 51 cases, they are female (79.7%), in 7 – male (10.9%), unspecified gender twice (3.1%), once the teacher is a child (1.6%), and three times teachers are presented as animals (4.7%). Images of animals in textbooks come from metaphoric meanings from Latvian folklore: sheep – naive, not clever or smart and the ram – stubborn and obstinate. It is difficult to say why these animals were chosen specifically to demonstrate the image of a teacher. It is doubtful these depict the image of the teacher of the "new era".

The teacher in primary school textbooks is predominantly a woman. In this case, textbooks reflect statistical reality as in 1997/1998, 86% of general education teachers in Latvia were women.[13] This percentage was even higher in primary schools.

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[5] F. Gasparini, M. Vick, 'Picturing the History of Teacher Education: Photographs and Methodology', *History of Educational Review*, vol. 35, no. 2, 2006, p. 17.

[6] K. Mahamud, 'Contexts, Texts, and Representativeness,' in Knecht, et al. (eds.), *Methodologie und Methoden der Schulbuch- und Lehrmittelforschung*, Bad Heilbrunn, Klinkhardt, 2014, pp. 31-49.

[7] J. Marshall, 'Image as Insight: Visual Images in Practice-based Research,' *Studies in Art Education*, vol. 49, no. 1, 2007, pp. 23-41.

[8] K. Rousmaniere, 'Questioning the Visual in the History of Education,' *History of Education*, vol. 30, no. 2, 2001, pp. 109-116.

[9] S. Weber, C. Mitchell, *That's Funny, You Don't Look Like a Teacher: Interrogating Images and Identity in Popular Culture*, London, The Falmer Press, 1995, p. 156.

[10] A. Novoa, 'Ways of Saying, Ways of Seeing: (19th–20th centuries),' *Paedagogica Historica,* vol. 36, no. 1, 2000, pp. 21-52.

[11] M. Vick, 'What Does a Teacher Look Like?,' *Paedagogica Historica,* vol. 36, no. 1, 2000, pp. 247-362.

[12] I. Kestere, R. Lozano, C. Wolhuter (eds.), *The Visual Image of the Teacher: International Comparative Perspectives,* Rīga, RaKa, 2012; I. Kestere, B. Kalke, 'The Visual Image of the Teachers: A Ten-Country Perspective', *Revista Columbiana de Educación*, vol. 1, no. 68, 2015, pp. 19-40; I. Kestere, B. Kalke, 'Controlling the Image of the Teacher Body under Authoritarianism: The Case of Soviet Latvia (1953–1984)', *Paedagogica Historica*, vol. 54, no. 1-2, 2018, pp. 184-203; B. Kaļķe, R. Brālis, 'Skolotāja tēls 19.gs. otrajā pusē latviešu prozā' [Teacher image in the Latvian fiction of the second half of 19th century], *ATEE Spring University 'Teacher of the 21st century: quality education for quality teaching,'* Rīga, Latvijas Universitāte, 2010, pp. 560-568.

[13] 'Centrālās statistikas pārvaldes datubāze' [Data base of Central Statistical Bureau]. Available: http://data1.csb.gov.lv/pxweb/lv/sociala/sociala__izgl__vispskolas/IZG190.px/ (accessed 10 September 2019).

Male teachers pictured in textbooks are mostly characters from excerpts from memoirs of classical Latvian authors. The teachers depicted are from the 19th century when female pedagogues were a rarity.[14] Male teacher images depicted the head of the teacher seminar and school principals, decision makers in education, thus clearly indicating gender preference. Only two male teachers depicted in the textbooks are involved in modern pedagogical processes in the class.

Age. The average age of teachers in Latvia increased during this period: most teachers were between 40 and 60 years old – 64%; only 8% are below 30.[15] The majority of textbooks pictured teachers as middle-aged, thus reflecting reality. Three teacher images are young – up to 30 years. One teacher was identified as elderly, indicated by gray hair.

Textbooks indicate stereotypes about young, inexperienced teachers who "don't know how to teach yet". But after regaining independence, younger teachers were exactly those who were able to implement changes in education more successfully. In their work, based on new educational requirements, young teachers were able to implement changes in the role of pedagogues and students by supporting new teaching and upbringing methods, applying a 'child-centered' approach, and sharing responsibility for student achievments.

Clothing and body. The appearance of teachers in this study was analised using only drawings and pictures.

Teachers are usually slim; only one teacher was depicted as overweight. All male teachers are dressed in dark suits (gray, green, or brown), but female teachers wear colourful clothes. Of course, we must consider the development of 21st century printing techniques that contributed to improved quality and colourful images. Most frequently, female teachers wear dresses or blouses/jackets/sweaters/blazers with skirts. None of the female teachers wear pants. Therefore, we could say that their femininity was emphasised. A formal style prevailed, but it was not always a classic suit in dark colours. Illustrators chose to depict teachers in bright colours – various shades of purple are very popular followed by red, green, yellow, blue, and brown. Teachers never wear black (except in black and white images).

A colorful appearance may create a positive attitude in younger pupils (7-11 years) towards the teacher, but on the other hand, these images can distract from the educational messages coded in the textbook. Indirect attention is still very important for this age group.[16]

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[14] Z. Ivana, D. Urbanoviča, *Latviešu valoda 3. klasei,* 1.daļa [Latvian language for the 3rd grade, vol. 1], Rīga, RaKa, 2000, p. 14.

[15] V. Anstrate, 'OECD: Latvijā liels sieviešu un gados vecāku skolotāju īpatsvars' [OECD: amongst Latvian teachers women and elderly teachers are prevailing], *Latvijas Sabiedriskie Mediji* [Public broadcasting of Latvia], 16 September 2016. Available: https://www.lsm.lv/raksts/zinas/latvija/oecd-latvija-liels-sieviesu-un-gados-vecaku-skolotaju-ipatsvars.a201118/ (accessed 20 September 2019).

[16] Ž. Piažē, *Bērna intelektuālā attīstība* [Intellectual development of the child], Rīga, Pētergailis, 2002, p. 318.

Shoes. Footwear is rarely shown (only 5 times) and shoes are not as colourful as clothing, mostly brown or black. Male teachers wear dark brown shoes with laces, female teachers – pumps with a low or slightly raised heel.

Two images from a first-grade math book are interesting: in the first and second images, pupils wear identical clothes but the teacher's shoes change from yellow to red.[17] Why did the teacher change shoes? If the task in the text was to find differences, then this would be understandable, that the task at hand was learning cardinal and ordinal numerals.

Hair. The length of teachers' hair is definitely short (chin length), but hair colour differed – mainly shades of brown, but also auburn, blonde, and gray. Male teachers' hair is also short: in two images ascending from the forehead, apparently to emphasise that teacher is an elderly person. All teachers have neat hairstyles. A study of 15-year-old student perceptions of the typical teacher indicated that teachers mostly had a standard "bun" hairstyle,[18] but we did not find this image in any of the textbooks.

We can conclude that hairstyles are casual and teachers do not create an individual style.

Accessories and jewelry. Accessories symbolise the professional activities of teachers. If we compare the image of teachers in Soviet times,[19] specific changes are not visible in the use of accessories or jewelry. However, the "new era" teacher holds a book, sheets of paper or a folder, or a pen or pencil (red pen in one image). These accessories emphasised the teacher's main activities – teaching (as we can see, teaching by the book), evaluation, and control.

Wearing a watch emphasises the punctuality of the teacher. An exercise in the textbook in which the teacher needs to tell what time it is shows that teachers should definitely wear a watch.[20] An anecdote in the Latvian language book for 4th grade says: "'What is your favorite subject at school?' Auntie asks Robert. 'The teacher's watch.'" [21] This anecdote makes one believe that lessons at school were boring.

Glasses are traditionally the symbol of the teaching profession, indicating both wisdom and also long hours spent correcting students' work. One third (31%) of 15-year-old respondents named glasses as a traditional teacher

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[17] J. Mencis (sen.), et al., *Matemātika 1. klasei* [Mathematics for the 1st grade], Rīga, Zvaigzne ABC, 2001, p. 33.

[18] I. Ķestere, B. Kaļķe, 'Latvijas skolotāju vizuālais tēls Eiropas skolēnu perspektīvā' [Visual image of the teacher of Latvia from the perspective of the European students], *Latvijas Zinātņu Akadēmijas* Vēstis [News of the Latvian Academy of Science], no.1/2, 2014, pp. 55-68.

[19] I. Kestere, B. Kalke, 'Obraz ucitelja v sovetskoj Latvii 1945–1985: ideal protiv realnostji?' [Teacher image in the school of Soviet Latvia 1945–1985: ideal against reality?], in V. G. Bezrogov, T. S. Makarova (eds.), *Dorogoj drug: Socialniji modelji i normi v ucjebnoi literaturi 1900–2000 godov (istoriko-pedagogiceskoje issledovanije)* [Dear friend: social models and norms in the textbooks of 1900–2000 (studies in history of pedagogy)], Moskva, Pamjatniki istoriceskoi mislji, 2016, pp. 49-66.

[20] V. Dirnēna, et al., *Ar gudru ziņu* [Bringing a smart message], Rīga, RaKa, 2004, p. 9.

[21] G. Andersone, Ā. Ptičkina, *Zīle. Latviešu valoda 4. klasei* [Acorn. Latvian language for the 4th grade], Rīga, Zvaigzne ABC, 2002, p. 216.

accessory,[22] but in textbook images, we found only two female and two male teachers wearing glasses. Perhaps, the illustrators tried to avoid stereotypes.

We can affirm that teacher clothing is simple, without adornment or jewelry. A scarf was added to the outfit of only one teacher. Several teachers had white collars; for example, a yellow sweater or green blazer with a white collar. Jewelry that demonstrates the individuality of the person does not appear. The Soviet period was similar in this case.[23] Perhaps because images in textbooks are small, there simply was not enough space for small details. Another explanation could be the traditional perception that pedagogical competences and not pretentious jewelry adorn the teacher in the classroom, as the latter could distract the attention of pupils from the learning process.

Facial expressions, gestures. Students focus more on facial expressions and gestures than words because non-verbal communication supplies not only information but also emotions. Teachers can express positive attitudes and joy with a smile, which should be an everyday emotion in the democratic school. Yet in textbooks, teachers smile in only six images. In one illustration, a smile is probably not the most suitable facial expression as the text speaks of classroom repair costs. In the majority of cases, teachers have a neutral facial expression, even as the pupil is telling the teacher about his toothache. Facial expressions do not indicate that teachers are especially interested in the child, in spite of the stress on cooperation in the "new era". But we must remember that images in textbooks are created by artists to demonstrate their professional skills.

Gestures of teachers in textbooks can be indicative, for example when a teacher points to a picture or blackboard, or they can be closed gestures with crossed arms or seated with hands in the lap. Some images accentuate the text. In the poem *So it happened* in a 2nd grade Latvian language textbook describes how a pupil was left for detention by the teacher and locked in the classroom, forgotten. The picture shows a terrified teacher – scared facial expression and hand by mouth in horror.[24] Another surprised face of a teacher is shown when the grandmother appears at school instead of the granddaughter.

Images reflecting the teacher's personality

Activity. As expected, classroom teaching is the main activity of teachers, rarely extracurricular activities. The images show teachers indicating,

[22] B. Kaļķe, 'The Visual Image of the Teacher in Latvia,' in I. Kestere, R. Lozano, C. Wolhuter (eds.), *The Visual Image of the Teacher. International Comparative Perspectives,* Rīga, RaKa, 2012, p. 113.

[23] I. Kestere, B. Kalke, 'Obraz ucitelja v sovetskoj Latvii 1945–1985: ideal protiv realnostji?' [Teacher image in the school of Soviet Latvia 1945–1985: ideal against reality?], in V. G. Bezrogov, T. S. Makarova (eds.), *Dorogoj drug: Socialniji modelji i normi v ucjebnoi literaturi 1900–2000 godov (istoriko-pedagogiceskoje issledovanije)* [Dear friend: social models and norms in the textbooks of 1900–2000 (studies in history of pedagogy)], Moskva, Pamjatniki istoriceskoi mislji, 2016, pp. 49-66.

[24] G. Andersone, et al., *Zīle. Latviešu valoda 2. klasei* [Acorn. Latvian language for the 2nd grade], Rīga, Zvaigzne ABC, 2000, p. 19.

demonstrating, standing by the blackboard, sitting at the teacher's desk, observing the class, or listening to the answers of pupils. Only a few teachers are pictured together with their students.

If we judge the tasks of teachers from math textbooks only, then the main teaching activity is to supply pupils with various things: in a word exercise, for example, we read that a teacher hands out pencils.

In textbooks, classroom life is frequently demonstrated without the teacher, class photos and class descriptions without the teacher,[25] but as soon as text is devoted to teaching/learning issues, the teacher appears in descriptions and images. We can conclude that pupils are not able to study independently, which is, again, a depiction of a specific stereotype. An exception is in a math text where children are given a task to develop a project without the presence of teacher.[26] It is possible to observe positive changes in the outward appearance of the teacher in comparison to textbooks published during the Soviet era,[27] but nothing has really changed in the professional activities of teachers. However, the situation in Latvia had changed and the human paradigm and child-centered focus has become part of the agenda in the educational field since 1991. The teacher is not depicted among children but stands in front of them, speaking or reading from a book without using technologies that were commonplace during the 1990s. Just as under Soviet rule, the teacher is the provider of information but pupils – recipients. The teacher is active but pupils – passive participants in the pedagogic process. Pedagogy depicted in textbooks is still focused on the subjects and is teacher-centered.

Nevertheless, the relationship between students and teachers outside the study process is different. Students and teachers are equal in some ways, such as taking the same bus to school.[28] Relationships are pictured as friendly; for example, pupils bring flowers to their teacher and come to the teacher's birthday party where she offers them cake.[29]

Sometimes teachers are associated with mothers; for example, an exercise in the 3rd grade math book describes how pupils give daffodils to the teacher on Mother's Day.[30] But visually, the mother, even knitting at home in the evening,

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[25] D. Ērgle, et al., *Zīle. Latviešu valoda 3. klasei* [Acorn. Latvian language for the 3rd grade], Rīga, Zvaigzne ABC, 2001, p. 244.

[26] J. Mencis (sen.), et al., *Matemātika 3. klasei.* [Mathematics for the 3rd grade], Rīga, Zvaigzne ABC, 1999, p. 166.

[27] I. Kestere, B. Kalke, 'Obraz ucitelja v sovetskoj Latvii 1945–1985: ideal protiv realnostji?' [Teacher image in the school of Soviet Latvia 1945–1985: ideal against reality?], in V. G. Bezrogov, T. S. Makarova (eds.), *Dorogoj drug: Socialniji modelji i normi v ucjebnoi literaturi 1900–2000 godov (istoriko-pedagogiceskoje issledovanije)* [Dear friend: social models and norms in the textbooks of 1900–2000 (studies in history of pedagogy)], Moskva, Pamjatniki istoriceskoi mislji, 2016, pp. 49-66.

[28] J. Mencis (sen.), et al., *Matemātika 2. klasei* [Mathematics for the 2nd grade], Rīga, Zvaigzne ABC, 1998, p. 139.

[29] Ibid., p. 84.

[30] J. Mencis (sen.), et al., *Matemātika 3. klasei.* [Mathematics for the 3rd grade], Rīga, Zvaigzne ABC, 1999, p. 107.

is better dressed than the teacher at her workplace: the mother is shown in a festive outfit with styled hair.[31]

Some textbooks focus special attention on the teacher's extra-curricular activities: when preparing for a hike, the teacher pours juice and water in a mug[32] (again, the service function), but another teacher has taken children to the theater and stands at the back (perhaps establishing order?).[33] A teacher also describes her journey to India, revealing that she has a personal life.

There are two main activities for teachers in textbooks – teachers educate (give knowledge and information) and provide upbringing functions (teaches how to act in various life situations). A title in the textbook indicates the transitional times: "We can do everything together" and text indicates desirable cooperation between teachers and children: "you can play and eat and argue together".[34] Unfortunately, the idea of cooperation is merely a pleasant exception in the total range of textbooks.

Character qualities. Character qualities and traits are barely depicted in excerpts of literary works published in textbooks. Two types of teachers prevail: nice or strict. In the sources I analysed, these two traits were mutually exclusive. School is characterised as a place with nice teachers.[35] Teachers frequently receive gifts "for no reason" because they are kind, responsive, nice, and helpful.[36] But the Latvian language book highlights the strictness of the teacher, asking students to repeat the expression 'strict teacher' 12 times, declining it both in singular and plural.[37] The teacher is also the one who requests students to complete difficult tasks: "Ansītis had difficult homework – write six names of edible things that rabbits don't like. Well, why did the teacher not ask to write things rabbits like?"[38] or the teacher asks Kārlis: "How much is half of seven?" Kārlis thinks: "If I say three – too little, if four – too much."[39] The teacher is also characterised as the person who helps solve difficult problems: if the pupil does

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[31] G. Andersone, et al., *Zīle. Latviešu valoda 2. klasei* [Acorn. Latvian language for the 2nd grade], Rīga, Zvaigzne ABC, 2000, p. 19; Ā. Ptičkina, *Valodas gudrību grāmata* [Language wisdom book], Rīga, Zvaigzne ABC, 2000, p. 19.

[32] J. Mencis (sen.), et al., *Matemātika 2. klasei* [Mathematics for the 2nd grade], Rīga, Zvaigzne ABC, 1998, p. 10.

[33] J. Mencis (sen.), et al., *Matemātika 1. klasei* [Mathematics for the 1st grade], Rīga, Zvaigzne ABC, 2001, p. 33.

[34] G. Andersone, et al., *Zīle. Latviešu valoda 2. klasei* [Acorn. Latvian language for the 2nd grade], Rīga, Zvaigzne ABC, 2000, pp. 13-14; Ā. Ptičkina, *Valodas gudrību grāmata* [Language wisdom book], Rīga, Zvaigzne ABC, 2000, pp. 13-14.

[35] G. Andersone, et al., *Mazā zīle. Latviešu valoda 1. klasei* [Small acorn. Latvian language for the 1st grade], Rīga, Zvaigzne ABC, 2004, p. 4.

[36] J. Mencis (sen.), et al., *Matemātika 3. klasei* [Mathematics for the 3rd grade], Rīga, Zvaigzne ABC, 1999, p. 107.

[37] G. Andersone, Ā. Ptičkina, *Zīle. 3. klasei. Valodas gudrību grāmata* [Language wisdom book], Rīga, Zvaigzne ABC, 2001, pp. 46-47.

[38] G. Andersone, et al., *Zīle. Latviešu valoda 2. klasei* [Acorn. Latvian language for the 2nd grade], Rīga, Zvaigzne ABC, 2000, p. 22.

[39] G. Andersone, Ā. Ptičkina, *Zīle. 3. klasei. Valodas gudrību grāmata* [Language wisdom book], Rīga, Zvaigzne ABC, 2001, p. 51.

not understand the task, textbook authors encourage students to seek help from the teacher.

Conclusion

The objective of my study was to clarify what kind of teacher Latvian primary school pupils can see in textbooks during the transition from authoritarian rule to democracy.

From a visual perspective, the teacher is a middle-aged women (complies with the actual situation in Latvian schools) who takes care of her external appearance. She is femininely dressed, in classic but colourful outfits – a blouse or sweater and skirt with matching shoes. Hair is neatly done. But the image of teacher is not striking, possibly to follow several middle-class stereotypes: 1) nothing should distract attention from studies; 2) modesty shows moral virtues; 3) and through external appearance, the teacher develops the esthetics of students and tasteful external appearance is modest.[40]

Textbooks do not demonstrate changes in the professional activities of teachers as required by democracy in education. Teaching/learning still takes place from books and pupils study in classrooms at their desks, but teachers still stand in front of the classroom by the blackboard or teacher's desk, holding a book or pen. In regard to teaching aids, only the blackboard, globe, or map is shown. We do not see cooperation between the child and the teacher, an important task brought forward in pedagogy during the transition period. Nothing indicates shared responsibility or self-responsibility because teachers still do the controlling, guiding, and instructing and provide pupils with learning tools. This study shows that even in new political circumstances, pedagogical processes can reflect the reality of the previous political structure and corresponding concepts, values, and needs.[41]

Nevertheless, the teacher has become more humane and friendlier, as evidenced by her portrayal outside the formal learning environment and in informal relationships with pupils.

Education is an important building tool, and textbooks are important in this process. They show what is preferred and ideal and become the drivers of pedagogy. This study indicates that the teacher, as reflected in primary school textbooks, has not drastically changed, indicating that it is not likely that significant changes in school practice were introduced.

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[40] I. Kestere, B. Kalke, 'Controlling the Image of the Teacher's Body under Authoritarianism: The Case of Soviet Latvia (1953–1984),' *Paedagogica Historica*, vol. 54, no. 1-2, 2018, pp. 184-203.

[41] G. Catlaks, 'Demokrātiskās pārmaiņas izglītībā; valsts izglītības politikas pārskats 1991–2001' [Democratic changes in education; state educational policy review 1991–2001], *Providus*, 20 November 2001. Available: http://providus.lv/article/demokratiskas-parmainas-izglitiba-valsts-izglitibas-politikas-parskats-1991-2001, (accessed 20 September 2019).

Chapter IV

New Paradigms for Educational Sciences

Democratisation of Educational Sciences (Pedagogy) in the Context of the Shift in Political Power of Latvia

Zanda Rubene and Iveta Ozola

Abstract. The purpose of this study is to analyse how political and social changes in society have influenced transformations in the academic discipline of pedagogy in Latvia from 1991 to 2004. Research sources are comprised of materials about notable individuals, theses completed, and scientific degrees obtained, and documentation about and archive materials from the doctoral programme in pedagogy at the University of Latvia. Latvian scholars were isolated from the Western academic field of pedagogy for 50 years, so a process of nostrification took place to prove compliance of those theses with current scientific requirements. It was also important to enrich and renew knowledge about current global research to further develop the communication network of Baltic scholars, as well as to join the networks of European and global researchers. Additionally, it was necessary to change the existing empiric tradition, based on a natural sciences paradigm that applied mostly quantitative research methods. Since 2003, pedagogy has developed according to social sciences methodology and is now defined as a social science. New textbooks had to be translated and developed and pedagogy curricula had to be re-created. It is clear that specific political circumstances influenced the development of pedagogy sciences in Latvia and caused interrupted continuity. Changes in the paradigm since 1991 have not taken place under the "natural" influence of research but due to political events.

Keywords: Pedagogy science, interrupted development, democratisation of education

Introduction

The development of pedagogy as an academic discipline in Latvia is a vivid example of how transformations in the academic sector represent political and social changes in society.

We can discuss the development of pedagogy as an academic discipline starting from 1919 when the University of Latvia was founded.[1] Today, this

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[1] I. Ozola, I. Ķestere, 'Pedagoģijas kā zinātnes ģenēze Eiropā (18. gadsimts–20. gadsimta 20.–30. gadi): historiogrāfiskais aspekts' [Geneses of pedagogy as a scientific discipline in Europe (18th century – 1920s-30s)], in A. Krūze, I. Ķestere (eds.), *Pedagoģijas vēsture. 15 jautājumi* [History of Education. 15 questions], Rīga, RaKa, 2010, pp. 78-105; A. Zigmunde, I. Ķestere, 'Latvijas Universitātes Pedagoģijas nodaļas pirmsākumi, studiju process, mācībspēki un studenti (1919–1944)' [Origins, study process, faculty and students of the Pedagogy Department of the University of Latvia (1919–1944)], in A. Krūze, I. Ķestere (eds.), *Pedagoģijas vēsture. 15 jautājumi* [History of Education. 15 questions], Rīga, RaKa, 2010, pp. 176-203.

institution is the only classical-type university in the world, providing studies and research potential in all classical and modern fundamental sciences in the Latvian language,[2] including educational sciences. The genesis of pedagogy as an academic discipline in this study is explained based on the example of the University of Latvia. Sources used in this study include:

1) Information from *Post-graduates and PhD graduates at the University of Latvia (1945–2004)*[3] and *Theses developed and completed at the University of Latvia (1996–2004);*[4]

2) Doctoral programme of pedagogy, University of Latvia documentation and archive materials;

3) University of Latvia Museum of Pedagogy collection;

4) Špona and Čehlova's *Research in pedagogy*,[5] which provides reviews of theses in pedagogy completed at the University of Latvia from 1993 to 2003.

For analysis of the pedagogy/educational science[6] *status quo* and prospective analysis we use dimensions developed by Hofstetter and Schneuwly:[7] institutional, socialisation, methodological, and communicative.[8]

Using the University of Latvia as a case study, we reveal how the above-mentioned dimensions were implemented in educational sciences during the turbulent times of change from dictatorship to democracy.

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[2]   H. Strods (ed.), *Latvijas Valsts Universitātes vēsture. 1940–1990* [History of the State University of Latvia. 1940–1990], Rīga, Latvijas Universitātes žurnāla 'Latvijas Vēsture' fonds, 1999.

[3]   V. Medne (ed.), *Latvijas Universitātes aspiranti un doktoranti. I. daļa. Aspirantūras un doktorantūras personāliju, aizstāvēto disertāciju un iegūto zinātnisko grādu apkopojums (1945–2005)* [Post-graduates and PhD graduates in the University of Latvia. Part I. Collection of the biographies of post-graduates and PhD graduates, theses completed and scientific degrees obtained (1945–2005)], Rīga, LU Akadēmiskais apgāds, 2009.

[4]   D. Paukšēna, I. Rampāne (eds.), *Latvijas Universitātē izstrādātās vai aizstāvētās disertācijas (1996–2005)* [Theses developed or defended in the University of Latvia (1996–2005)], Rīga, LU Akadēmiskais apgāds, 2008.

[5]   A. Špona, Z. Čehlova, *Pētniecība pedagoģijā* [Research in pedagogy], Rīga, RaKa, 2004.

[6]   During the shift of the scientific paradigm and the trans-disciplinary in the 1990s, scholars actively discussed the essence and research subject of two sciences – 'Pedagogy' and 'Educational sciences'. In this article 'Pedagogy science' and 'Educational science' are used as synonyms. See Z. Rubene, 'Pedagoģijas zinātne pēc Latvijas neatkarības atjaunošanas' [Pedagogy science after restoration of independence], in A. Krūze (ed.), *Laikmets un personība* [Era and personality], vol. 15, Rīga, RaKa, 2015, pp. 105-134.

[7]   Other researchers of the genesis of scientific fields spoke about similar indicators, for example: R. Stichweh, 'Wissenschaftliche Disziplinen: Bedingungen ihrer Stabilität im 19. und 20. Jahrhundert,' in J. Schriewer, E. Keiner, Ch. Charle (Hrsg.), *Sozialer Raum und akademische Kulturen. Studien zur europäischen Hochschul- und Wissenschaftsgeschichte im 19. und 20. Jahrhundert*, Frankfurt am Main, Berlin, Bern, New York, Paris, Wien, Verlag Peter Lang GmbH, 1993, S. 241; K.-P. Horn, 'Disziplingeschichte,' in G. Mertens, U. Frost, W. Böhm, V. Ladenthin (Hrsg.), *Handbuch der Erziehungswissenschaft. Band I. Grundlagen – Allgemeine Erziehungswissenschaft*, Paderborn, München, Wien, Zürich, Ferdinand Schöningh, 2008, S. 6.

[8]   R. Hofstetter, B. Schneuwly, *Zur Geschichte der Erziehungswissenschaften in der Schweiz. Vom Ende des 19. bis zur Mitte des 20. Jahrhunderts*, Bern, hep verlag ag, 2011, S. 20-21.

Characteristics of the dimensions of pedagogy
as a scientific field

We understand the term 'scientific field' as both the research process (creation of new knowledge) and the result – generalised knowledge in a system about the respective area of reality. As mentioned before, creation and development of a scientific field is characterised by four dimensions: institutional, socialisation, methodological, and communicative.[9]

The institutional dimension, consisting of chairs and professorships in higher education institutions and research institutes and laboratories, enables professionalisation of research and ensures creation and transfer of new knowledge. Institutions provide existence of a scientific field as a self-reproducing system. In addition, institutions develop a research community in the field. It is precisely the activities of these communities that promote further development of the discipline, and institutions secure the existence of sciences as socially communicative systems.

The communicative dimension, or the network of scientific communication (specialised press and book series, research societies and associations, congresses, and other academic events), ensures exchange of views within a research community and existence of a scientific discipline as a transnational communication system. The communicative process in science is formed by development and processing of knowledge, as well as testing and criticism.

The methodological dimension creates scientific knowledge through continuous development and renewal of theoretical models and concepts, data collection and analysis methods, thus ensuring the existence of science as a self-evolving system.

The socialisation dimension ensures preparation of a young generation of researchers and self-reproduction of the field.[10]

Based on these dimensions, we discuss the formation of pedagogy as an independent science in Europe starting from the second half of the 18th century when the first departments of pedagogy/education were founded.[11] In Latvia, pedagogy sciences were created only in 1919 when the Department of Pedagogy was added to the Faculty of Philology and Philosophy in the newly founded

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[9] For more about the development of pedagogy as a science and dimensions characterising scientific fields see I. Ozola, 'Pedagoģijas zinātnes ģenēze Latvijā no 20. gadsimta 20. gadiem līdz 60. gadu sākumam' [Genesis of pedagogy science in Latvia from the 1920s to the 1960s], PhD diss., University of Latvia, 2013.

[10] R. Hofstetter, B. Schneuwly, *Zur Geschichte der Erziehungswissenschaften in der Schweiz. Vom Ende des 19. bis* zur Mitte des 20. Jahrhunderts, Bern hep, der Bildungsverlag, 2011, S. 20-21; R. Hofstetter, B. Schneuwly, 'Einleitung. Entstehung und Entwicklung der Erziehungswissenschaft. Herausforderungen und aktuelle Fragen,' in R. Hofstetter, B. Schneuwly, *Erziehungswissenschaft(en) 19.–20. Jahrhundert: Zwischen Profession und Disziplin*, Bern, Peter Lang Verlag, 2002, S. 39.

[11] The first Department of Pedagogy in German territory was developed at Halle University. See K.-P. Horn, *Erziehungswissenschaft in Deutschland im 20. Jahrhundert. Zur Entwicklung der sozialen und fachlichen Struktur der Disziplin von der Erstinstitutionalisierung bis zur Expansion*, Bad Heilbrunn/Obb., Verlag Julius Klinkhardt, 2003, S. 13.

University of Latvia and the first professors were appointed.[12] Achieving university status can be regarded as the main precondition for formation of a scientific discipline, and analysis of the development of the pedagogy in Latvia after 1991 highlights the significance of the University of Latvia in the development and maintenance of this academic discipline. We should not underestimate the contribution of other institutions in research and development of pedagogy, but the University of Latvia's doctoral programme could be considered the main centre of academic pedagogy.

Development processes that took place in all dimensions should be analysed in correlation. When speaking about preparation of a new generation of researchers, the socialisation dimension cannot be isolated from the institutional dimension. Thus, we explain the development of pedagogy science in Latvia in detail, analysing processes and changes that took place from 1991 to 2004 in the institutional, communicative, and methodological dimension.

Context: pedagogy science in Latvia during the interwar period and under Soviet rule

Development of pedagogy sciences took place during changes of ruling powers. Therefore, to analyse the period from 1991 to 2004, it is necessary to provide a short insight into the background of pedagogy as an academic discipline.

During the 1920s-30s, pedagogy in Latvia developed through German humanist traditions (*geisteswissenschaftliche Pädagogik*).[13] A small but active number of Latvian scholars worked at the University of Latvia. They developed the study programmes and taught pedagogy, pedagogical psychology, and the history of pedagogy, preparing a new generation of scholars. The knowledge of these professors was widely published in books, articles, and in the pedagogical press. Latvian pedagogues upgraded their knowledge in European universities (especially Germany), and they travelled abroad for business and exchange of expertise. All preconditions for the formation of pedagogy as an independent scientific discipline were provided, and it developed in compliance with the current academic trends of Europe.

During the interwar period, Latvian pedagogy developed in humanist traditions based on idealism, a significantly different approach than

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[12] A. Krūze, 'Pedagoģijas un psiholoģijas katedra' [Pedagogy and Psychology Department], in A. Varslavāns (ed.), *Latvijas Universitāte 75* [University of Latvia. The 75th Anniversary], Rīga, Latvijas Universitāte, 1994, p. 337.

[13] More about the formation and development of the pedagogy science in Latvia during the interwar period see I. Ozola, 'Pedagoģijas zinātnes ģenēze Latvijā no 20. gadsimta 20. gadiem līdz 60. gadu sākumam' [Genesis of pedagogy science in Latvia from the 1920s to the 1960s], PhD diss., University of Latvia, 2013; A. Zigmunde, I. Ķestere, 'Latvijas Universitātes Pedagoģijas nodaļa zem divām okupācijām' [Department of Pedagogy of the University of Latvia under two occupations], in A. Vīksna (ed.), *Zinātņu vēsture un muzejniecība. Latvijas Universitātes Raksti* [History of sciences and museology. Scientific papers. University of Latvia], vol. 780, Rīga, Latvijas Universitāte, 2012, pp. 313-325.

the materialist, scientific worldview in the Soviet Union. Thus, after the incorporation of Latvia into the Soviet Union in 1940, Latvian interwar period achievements were regarded as inappropriate for Soviet ideology. Humanist-based pedagogy was replaced with Marxist-Leninist pedagogy based on social class theory. Trivialised Marxism was imported from the Soviet Union in ready-made forms, namely, professors educated in the Soviet Union were appointed to the State University of Latvia.[14] They implemented pedagogy programmes and textbooks prepared in the Soviet Union, and Latvian mass media published leading Soviet scholar theories translated from Russian into Latvian.[15]

Post-World War II pedagogy applied social sciences research methods – observation, experiments, interviews, a.o.[16] – forming an empiric social science. Research was performed using only the imported Marxist-Leninist paradigm, excluding the latest scientific trends of Europe and the world. All scientific dimensions of pedagogy again were only fully developed in the late 1950s/ early 1960s when the first generation of researchers were raised in Marxist-Leninism pedagogy traditions at the State University of Latvia.[17] New Marxist pedagogy researchers began to develop their own pedagogy course programmes and published research results in press and article collections, but the first textbook written by a Latvian author was published only in 1987.[18] Therefore, development of pedagogy science under the Soviets can be only characterised as relatively comprehensive: we can speak more of the contribution of Latvian scholars in the development of institutional, communicative and socialisation dimensions of pedagogy science.

Interrupted continuity of pedagogy science

Within the context of the shift in the scientific paradigm, we can conclude that development of pedagogy sciences did not take place according to the Thomas Kuhn scientific revolution theory. The Kuhn theory states that scientific discipline develops as a self-evolving system 1) by acquiring new

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[14] State University of Latvia – name of the university during both Soviet occupation periods 1940–1941 and 1944–1991.

[15] For development of pedagogy science in Latvia under Soviet rule see also A. Krūze, 'Development of Pedagogy as a Science in the Baltic Republics under Soviet Rule,' in I. Ķestere, A. Krūze (eds.), *History of Pedagogy and Educational Sciences in the Baltic Countries from 1940 to 1990: an Overview*, Rīga, RaKa, 2013, pp. 230-234; A. Krūze, I. Ozola, 'Pedagogy as Science in Latvia,' in I. Ķestere, A. Krūze (eds.), *History of Pedagogy and Educational Sciences in the Baltic Countries from 1940 to 1990: an Overview*, Riga, RaKa, 2013, pp. 234-242.

[16] I. A. Kairov (ed.), *Pedagogika* [Pedagogy], Moskva, Gosudarstvennoje učebno-pedagogičeskoje izdateľstvo miņisterstva prosveščenija RSFSR, 1956, pp. 17-18.

[17] Until 1960s Latvian researchers of pedagogy studied in post-graduate programmes of other universities in the Soviet republics and defended their theses mostly in Moscow and Leningrad, also Vilnius.

[18] J. Anspaks, *Ievads marksistiski ļeņiniskajā pedagoģijā* [Introduction to Marxist-Leninist pedagogy], Rīga, P. Stučkas Latvijas Valsts universitāte, 1987.

knowledge and opinions during the scientific process that can't be explained in the frame of the dominant paradigm or 2) when problems emerge that can't be solved within the existing paradigm. When these two preconditions apply, the crisis can be resolved only with a change of paradigm. When this new paradigm gains an increasing number of supporters in the scientific community, scientific revolution is created resulting in a change of paradigm.[19] Within the specific political circumstances of Latvia, development of pedagogy science did not fit into the scientific revolution theory as it was not connected with the development of science itself – creation of new methods, concepts, paradigms – but was imposed by a change in the ruling order.

The first paradigm shift happened when the pedagogy science developed during 1920s-30s was replaced by imported and trivialised Marxist pedagogy in the 1940s. A similar situation could be observed after regaining independence in 1991 with regards to a change of paradigm. Although the change in political power in 1991 was part of democratisation processes, the paradigm change (for the second time) did not take place under "natural" influences of scientific concepts but due to political events. During the 1990s, Marxist-Leninist pedagogy concepts were abandoned as they were no longer suitable to the new state order and the new perceptions of raising the young generation. Regardless of whether democracy shifted to totalitarianism or vice versa, the same trends could be observed in the development of pedagogy sciences in Latvia, i.e. direct influence of politics in the academic field. Consequently, the restoration of independence in Latvia resulted in the interruption of the natural evolutionary path and development of pedagogy science.

Analysis of pedagogy science development on the institutional dimension

Academic restoration procedures in the University of Latvia began before regaining independence in 1991 in both content and institutional perspectives: in October 1989, the Scientific Communism Chair was transformed into the Political Science Department; in June 1990, the Faculty of Theology was restored; and in June 1991, the Civil Defence Department was liquidated.[20] Mandatory military training was also removed from curricula.

Changes in the university educational systems of all three Baltic countries were introduced after 1988, most notably in the renewal of democratic principles and cancellation of previously existing contextual and methodical limitations

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[19] T. Kuhn, *Struktura naučnih revoļucij* [Structure of scientific revolutions], Moskva, AST, 2009.
[20] A. Varslavāns (ed.), *Latvijas Universitāte 75* [University of Latvia. The 75th Anniversary], Rīga, Latvijas Universitāte, 1994; H. Strods (ed.), *Latvijas Valsts Universitātes vēsture. 1940–1990* [History of the Latvian State University. 1940–1990], Rīga, Latvijas Universitātes žurnāla 'Latvijas Vēsture' fonds, 1999.

and especially in the social sciences and humanities. Transition from the Soviet scientific degree structure[21] to the Western model took place.[22]

The Pedagogy and Psychology Department established under Soviet rule continued to function. In 1992, a Master's programme was initiated providing studies in general and social pedagogy. The Department was the basis for doctorate studies in pedagogy: in 1992, Board of Doctoral Studies in Pedagogy was added to the department and it managed doctoral study programmes and completion of theses.

In 1996, the Department of Pedagogy and Psychology became the University of Latvia Institute of Pedagogy and Psychology and operated as such until 2003. In 2004, the Institute was merged with the Faculty of Pedagogy and Psychology, establishing the Department of Pedagogy that continued the work of the former institute.[23]

Development of pedagogy and other social sciences and humanities during the post-Soviet period revealed specific problems caused by 50 years of isolation from the academic experience of the world. As during the Soviet era, when pedagogy science needed to adjust to the ruling communist ideology, after Latvia regained independence, its researchers frequently experienced cautious and biased attitudes from scholars of the "hard" sciences and from society in general.

In the beginning of 1990s researchers of social sciences and humanities were subjected to nostrification process demanding repeated evidence of the compliance of their theses with the current scientific requirements. On 1 October 1991, regulations 'On allocation of academic degrees' were adopted and a Board of Doctoral Studies in Pedagogy of the University of Latvia was established, which performed the nostrification or repeated recognition of the USSR academic degrees. Until June 1999 – 123 pedagogy scholars were nostrified.[24]

Emotionally, nostrification was a very difficult process – especially for researchers of the older generation. Therefore, few of them even decided not

[21] Under Soviet rule, a two-level scientific degrees system existed in Latvia – Candidate of Sciences and Doctor of Sciences. Since 1993, only the doctoral degree (PhD) remains. See V. Medne (ed.), *Latvijas Universitātes aspiranti un doktoranti. I. daļa. Aspirantūras un doktorantūras personāliju, aizstāvēto disertāciju un iegūto zinātnisko grādu apkopojums (1945–2005)* [Post-graduate and doctoral students of the University of Latvia. Part I. Compilation of the post-graduate and doctorate students, completed theses and acquired academic degrees], Rīga, LU Akadēmiskais apgāds, 2009.

[22] OECD centrs sadarbībai ar nedalībvalstīm [OECD Centre for Cooperation with Non-Member States], *Nacionālo izglītības politiku analīze. Latvija* [Analysis of national educational policies. Latvia], Rīga, Profesionālās izglītības attīstības programmas aģentūra, 2002.

[23] A. Krūze, 'Pedagoģijas nodaļa' [Department of Pedagogy], in A. Krūze, *LU Pedagoģijas, psiholoģijas un mākslas fakultāte zinātnei un izglītībai* [Faculty of Pedagogy, Psychology and Arts of the University of Latvia for science and education], Rīga, LU Akadēmiskais apgāds, 2013, pp. 89-121.

[24] Pedagogy Museum Collection of the University of Latvia.

to take part in this procedure, therefore denying themselves the opportunity to participate in the scientific community of independent Latvia.

Sources about the number of PhD thesis completed in pedagogy science from 1992 to 2003 are contradictory. Especially about the period when nostrification took place, as well as the period when the transition from the two level to one level Doctoral degrees system occurred (until 1998). As compilers of the review acknowledge, it was not easy to obtain information about theses completed during the first half of 1990s as in this period strict regulations about handing over of the manuscript and summary to scientific libraries were lacking, as well as the requirement to notify about the presentation of theses in mass media was not always precisely followed.[25]

On the basis of the report about pedagogical studies in Latvia at the turn of the 21st century in the monograph 'Research in Pedagogy,' we can conclude that from 1993 to 2003, 91 scientists of pedagogy completed their Doctoral theses, including 18 *doctor habilitus* theses.[26]

In 1999, the Cabinet of Ministers adopted 'Regulations on the Procedure and Criteria of the Doctoral Thesis.'[27] These amendments to the law determined the formation of Qualification Committee in the frame of the Latvian Academy of Sciences. Duties of the Committee were related to evaluation of the quality of submitted theses. Also, a requirement was set that theses should be internationally discussed in conferences and publications.

Creation of the Qualification Committee explains the large number of theses completed in the first half of 1999 in comparison to 2000. There were 15 theses completed in pedagogy in 1999. However, in 2000, when the Qualification Committee had already started the evaluation process, only one (!) thesis was presented.

After the collapse of the Soviet Union, pedagogy researchers in Latvia also encountered the lack of study materials based on modern global academic achievements and democratic values. University of Latvia professors developed new curricula of pedagogy, constantly improving their knowledge. Textbooks used during the Soviet era "vanished" from reading lists, including the knowledge accumulated (excepting books by Soviet authors Iljina and Babanskis that were used after 1991[28]).

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[25] V. Medne (ed.), *Latvijas Universitātes aspiranti un doktoranti. I. daļa. Aspirantūras un doktorantū-ras personāliju, aizstāvēto disertāciju un iegūto zinātnisko grādu apkopojums (1945–2005)* [Post-graduate and doctorate students of the University of Latvia. Part I. Compilation of the post-graduate and doctorate students, completed theses and acquired academic degrees], Rīga, LU Akadēmiskais apgāds, 2009; D. Paukšēna, I. Rampāne (eds.), *Latvijas Universitātē izstrādātās vai aizstāvētās disertācijas (1996*–2005) [Theses developed or defended in the University of Latvia (1996–2005)], Rīga, LU Akadēmiskais apgāds, 2008.

[26] A. Špona, Z. Čehlova, *Pētniecība pedagoģijā* [Research in pedagogy], Rīga, RaKa, 2004.

[27] D. Paukšēna, I. Rampāne (eds.), *Latvijas Universitātē izstrādātās vai aizstāvētās disertācijas (1996–2005)* [Theses developed or defended in the University of Latvia (1996–2005)], Rīga, LU Akadēmiskais apgāds, 2008.

[28] O. Zīds (ed.), *Vispārējā pedagoģija. Darba programma akadēmiskajām studijām pedagoģijā un psiholoģijā* [General pedagogy. Academic study programme in pedagogy and psychology], Rīga,

Lists of textbooks in 1990s curricula of pedagogy indicate that equal value was given to modern Western authors as to Soviet authors and Latvian literature of the 1920s–30s. This demonstrates that students did not receive integral current pedagogical knowledge and shows also the confusion of professors.

It was necessary to renew the range of available textbooks in libraries in a short period of time. Introduction of the Internet in Latvia in 1992 helped to solve this problem, but much can be attributed to the development of international mobility of university professors and students. During the transition period, it was common to receive textbooks as gifts from Latvians in Western exile,[29] as well as from new cooperation partners in the West. Required literature was translated, *en masse*, into Latvian with the support of various international foundations (such as the Soros Foundation). Also, Latvian pedagogy researchers were actively involved in the development of their own Latvian textbooks in pedagogy and books related to various pedagogical theories and practice.

Pedagogy science development on the methodological dimension

Isolation from current global research had created a situation in which post-Soviet researchers were frequently not well-acquainted with the most important global theories. It created the necessity for the academic staff to rapidly acquire their discipline anew.

Post-Soviet academic staff during the 1990s had insufficient foreign language skills, which encumbered their inclusion into the international scientific community. Soviet people from Latvia, who had resided behind the Iron curtain, knew primarily only Latvian and Russian. Therefore, "success stories" in the early 1990s were related not as much with professional qualities as with foreign language skills – good knowledge of English, German, or French was a springboard for good career development. During the 1990s, research in Latvia was characterised by expressed focus towards the West and isolation from Russian culture and scientific traditions that, once again, basically created a decidedly one-sided approach to pedagogy.[30]

During the first years of independence, social sciences and humanities regained the focus of the interwar period: development was oriented towards

Latvijas Universitāte, 1991; M. Pļaveniece, I. Ķestere, 'Autorprogramma kursam 'Pedagoģija'' [Author's programme for the course 'Pedagogy']*,* manuscript, around 1991; M. Pļaveniece, I. Ķestere, 'Darba programma kursam 'Pedagoģija'' [Programme for the course 'Pedagogy']*,* manuscript, after 1991, Pedagogy Museum Collection of the University of Latvia.

29 J. Stradiņš, 'Ceļavārdi II Pasaules latviešu zinātnieku kongresam' [Farewell words during the II World Congress of Latvian Scientists], in *II Pasaules latviešu zinātnieku kongress. Tēžu krājums* [II World Congress of Latvian Scientists. Compilation of conference abstracts], Latvijas Zinātņu akadēmija, Rīga, 2001, p. 35.

30 Z. Rubene, 'Geisteswissenschaften und akademische Bildung in Lettland,' in P. Gutjahr-Löser, D. Schulz, H.W. Wollersheim (Hrgs.), *Theodor-Litt-Jahrbuch 2010/7*, Leipzig, Leipziger Universitätsverlag, 2010, S. 57-73.

maintaining national values, preserving national identity, care for the social and national course of the state, and towards implementation of global and European intellectual values in the future.[31]

In pedagogy in the 1990s, the empiric or experimental tradition developed during Soviet period continued to operate but creation of an international scientific network and the popularity of interwar period pedagogical thought resulted in a transformation of methodology during the latter 1990s. Two opposite trends could be observed: 1) a return to the understanding of pedagogy as the applied philosophy that dominated during the 1920s–1930s, and 2) the continuation and fostering of the positivism tradition in pedagogy. It should be noted that both these directions did not match the actual perception of pedagogy sciences in the world during the 1990s and did not promote inclusion of Latvia into the European academic community. This paradoxical situation attests to the previously mentioned concept that, although Latvia gained independence in 1991 and the state structure changed from totalitarian to democratic, the natural development and continuity of pedagogy science was interrupted again.

Until 1997, theses completed in pedagogy covered the same two areas as they did during Soviet period: 1) pedagogy theory and history and 2) pedagogy of branches (teaching methods). In 1998, pedagogy disciplines became more versatile: 6 doctoral theses were completed in various pedagogy areas – 5 in general pedagogy, 1 – preschool pedagogy and 1 in university pedagogy.[32] In 1999, the first doctoral thesis in school and adult education were presented.

A small number of pedagogy theses completed during this period represent the humanitarian paradigm in regards to cognitive orientation, for example, *Teachers – writers in the pedagogy theory and practice in Latvia from 1900 to 1940* (2002)[33] and *Theory development of religion pedagogy* (2002).[34] These studies were developed using traditional methods of humanities, mostly hermeneutic text interpretation. But, theses in pedagogy still applied quantitative research methods using empiric pedagogy traditions based on a natural sciences paradigm.

The first doctoral theses in social pedagogy was presented in 2003 (shortly before Latvia joined the European Union), demonstrating a new cycle in the development of pedagogy science in Latvia.[35] In 2003, the doctoral thesis

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[31] J. Ekmanis, 'Augstskola, zinātne, valstiskums – viens veselums' [University, science, statehood – one entirety], in H. Grīnberga (ed.), *Virzītājspēks. Rakstu krājums par augstāko izglītību Latvijā* [Driving force. Compilation of articles about higher education in Latvia], Rīga, Izglītības un zinātnes ministrija, 2007, pp. 137-151.

[32] A. Špona, Z. Čehlova, *Pētniecība pedagoģijā* [Research in pedagogy], Rīga, RaKa, 2004.

[33] B. Kaļķe, 'Skolotāji – rakstnieki pedagoģijas teorijai un praksei Latvijā no 1900. līdz 1940. gadam' [Teachers – writers in pedagogy theory and practice in Latvia from 1900 to 1940], PhD diss., University of Latvia, 2002.

[34] S. L. Remese, 'Reliģijas pedagoģijas teoriju attīstība' [Theory development of religion pedagogy], PhD diss., University of Latvia, 2002.

[35] M. Dirba, 'Latvijas identitāte: pedagoģiskais aspekts' [Identity of Latvia: pedagogical aspect], PhD diss., University of Latvia, 2003.

Improvement of the learning skills of young people during the Danish language learning process[36] applied qualitative research methods. The doctoral thesis *Research of the critical thinking process of young people during the study process in university*,[37] presented in January 2004, was developed according to social sciences methodology and pedagogy was defined as a social science in this study.

Pedagogy science development on the communicative dimension

In discussion of the communicative dimension of pedagogy science, we should analyse both that contribution of the pedagogy researchers in the development of the communication network in Latvia, as well as the inclusion process of the University of Latvia pedagogy scholars in the network of European and global researchers.

As mentioned earlier, pedagogy science encountered "methodological confusion" after Latvia regained independence: Soviet period theories were abandoned as not suitable for the new situation and were rapidly substituted with the ideas of Latvian authors from the interwar period. This definitely did not promote the development of science.

It was also important to introduce practitioners of education with the latest pedagogy science concepts that could help to implement educational ideals suitable to a democratic society. The magazine *Skolotājs* (Teacher) became one of these communication channels: its target audience were pedagogues-practitioners, and it was published in Latvian from 1996 to 2011.[38] Starting with the second issue of the magazine, University of Latvia pedagogy researchers regularly published theoretical and methodological articles, thus introducing a broad part of the educational society to their research results and current global issues in pedagogy science. Several University of Latvia pedagogy researchers sat on the editorial board of the magazine. We should emphasise the column 'A word to the scientist', created as a platform for discussion of scholars with educational practitioners. University of Latvia academics and doctoral students of pedagogy wrote for this column.[39]

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[36] E. Maslo, 'Jauniešu mācīšanās spēju pilnveide dāņu valodas mācību procesā' [Improvement of the learning skills of young people during the Danish language learning process], PhD diss., University of Latvia, 2003.

[37] Z. Rubene, 'Jauniešu kritiskās domāšanas izpēte studiju procesā universitātē' [Research of the critical thinking process of young people during the study process in university], PhD diss., University of Latvia, 2004.

[38] A. Šmite, 'Pedagoģiskais žurnāls 'Skolotājs' Latvijas izglītībai (1996–2011)' [Pedagogic magazine 'Teacher' for the Latvian education (1996–2011)], in A. Krūze (ed.), *Laikmets un personība* [Era and personality], vol.15, Rīga, RaKa, 2015, p. 462.

[39] For example: A. Krūze, 'Atceroties Jāni Gresti' [Remembering Jānis Greste], *Skolotājs* [Teacher], no. 2, 1997, pp. 78-81; A. Krūze, 'Starptautiskie semināri – pieredzes bagātināšanas forma' [International workshops – a form of widening your horizons], *Skolotājs* [Teacher], no. 2, 2000, pp. 13-15; A. Špona, 'Pirmsskolas audzināšanas teorija un prakse' [Preschool learning theory

To reclaim its position in the European cultural and scientific space, promotion of international cooperation was one of the academic community's most urgent tasks. Researchers were confronted with the necessity to gain recognition in the scientific area, which could be achieved by strengthening international cooperation networks and publishing their studies outside Latvia. Targeted internationalisation of scientific activities began, which meant development of the international cooperation network. If during the Soviet period, international contacts were formed mostly with other Soviet colleagues and Warsaw block member states, then after Latvia regained independence, special attention was paid to strengthening cooperation with researchers from Western Europe and the USA.[40]

Scholars from the global exile Latvian community actively promoted recognition of Latvian researchers and fostered international cooperation. In 2001, the Second World Congress of Latvian Researchers took place in Riga (the first Congress took place in 1991 before the restoration of independence) in which over 800 delegates from Latvia and 200 Latvians from abroad participated. The aim of the Congress was to promote the return of global-level research in Latvian universities and cooperation with foreign educational and science centres. Direct contacts with exile Latvian researchers were recognised as the drivers of development of new scientific thinking.[41] Pedagogy science was also represented at this congress – 27 pedagogy researchers took part with 22 presentations.[42]

During the 1990s, international cooperation among pedagogy researchers from the Baltic states was also strengthened. In 1999, a symposium in Riga

and practice], *Skolotājs* [Teacher], no. 2, 2002, pp. 10-13; A. Špona, 'Audzināšana kā sabiedrības kvalitātes pilnveidošanās prioritāte' [Upbringing as the society quality improvement priority], *Skolotājs* [Teacher], no. 2, 2002, pp. 29-31; I. Žogla, 'Skolas pedagoģija' [School Pedagogy], *Skolotājs* [Teacher], no. 5, 1997, pp. 8-10; I. Žogla, 'Mūsdienu mācību teorijas' [Modern scholastic theories], *Skolotājs* [Teacher], no. 4, 2001, pp. 4-8; I. Maslo, 'Mācību metodes izglītības iestādē' [Learning methods in the educational establishment], *Skolotājs* [Teacher], no. 6, 1998, pp. 5-7; E. Černova, 'Pirmklasnieka gatavība mācību darbībai' [Readiness of the first grader for the learning process], *Skolotājs* [Teacher], no. 4, 2000, pp. 12-14; I. Ķestere, 'Sociālās pedagoģijas jēdziens pirmās brīvvalsts laikā' [Social pedagogy concept during the first free state period], *Skolotājs* [Teacher], no. 5, 2001, pp. 103-105; I. Margeviča, 'Bilingvālās izglītības pieredze Eiropā' [Bilingual education experience in Europe], *Skolotājs* [Teacher], no. 6, 2001, pp. 44-46; I. Šūmane, 'Mācību vides veidošanās' [The development of the study environment], *Skolotājs* [Teacher], no. 6, 2001, pp. 46-48; S. Tūbele, 'Kāpēc skolēns nelasa' [Why the student does not read], *Skolotājs* [Teacher], no. 6, 2001, pp. 49-52; T. Koķe, 'Mūžizglītības pedagoģiskie pamati' [Pedagogical basis of the lifelong learning], *Skolotājs* [Teacher], no. 2, 2002, pp. 4-8.

[40] I. Dedze, Z. Rubene, 'Universities in Latvia – from the Soviet to European Higher Education Area,' *Foro de Education,* vol. 14, no. 21, 2016, pp. 13-38.

[41] J. Stradiņš, 'Ceļavārdi II Pasaules latviešu zinātnieku kongresam' [Farewell words during the II World Congress of Latvian Scientists], in *II Pasaules latviešu zinātnieku kongress. Tēžu krājums* [II World Congress of Latvian Scientists. Compilation of conference abstracts], Rīga, Latvijas Zinātņu akadēmija, 2001, p. 35.

[42] 'Sekcija 'Pedagoģija'' [Section 'Pedagogy'], in *II Pasaules latviešu zinātnieku kongress. Tēžu krājums* [II World Congress of Latvian Scientists. Compilation of conference abstracts], Rīga, Latvijas Zinātņu akadēmija, 2001, pp. vii-viii.

gathered pedagogy historians from Estonia, Latvia, and Lithuania: the Baltic Association of Historians of Pedagogy (BAHP) was created, even though it had functioned, unofficially, since the 1970s. In 2000, BAHP was founded as legal entity with divisions in Lithuania and Estonia.[43]

The first international research project was a study initiated by Professor Josef Held of University of Tübingen (Germany) – 'International learning' (*Internationales Lernen*). In the beginning the project included five countries (Germany, Greece, Latvia, Croatia and Netherlands), but later included another three (Spain, Poland, Switzerland). The project lasted from 1991 to 2007 and provided the opportunity to work in an international team and develop and initiate innovations for the promotion of the integrity of society in Latvia.

Studies on current topics were performed as part of this project; for example, researching social inclusion and isolation problems that was an issue for the young people of Latvia. Alongside research work, meetings with Latvian youth took place. In addition, two international conferences were organised in Riga in 1992 and 1998, and methodology workshops for project participants and other university staff, including Master's and Doctoral programme students were held. Four monographs were published, including *Youth Between Integration and Isolation (Jugend zwischen Integration und Ausgrenzung. Ergebnisse eines internationalen Projekts)* in 1999.

During the 1990s, cooperation between the University of Latvia and Leipzig University was very important for the development of the international pedagogy science communication network. This cooperation, which has continued for over 20 years, began in 1998 with Professor Dieter Schulz's lecture at the Konrad Adenauer Foundation Political Education Centre in Wendgreben.[44] In 2002, Leipzig University became the first foreign university to welcome University of Latvia pedagogy doctoral students through the ERASMUS exchange programme. Both universities continue to organise international workshops for pedagogy researchers: initially, Latvian scholars were the recipients of knowledge and experience, but over time, both parties have become equal discussion partners.

University of Latvia pedagogy researchers have also been involved in international scientific associations that promote inclusion in European and global networks. The University of Latvia has been a Member of the Association for Teacher Education in Europe (ATEE) since 1997. The first ATEE conference in Riga took place in 2002.[45] Organisation of this conference in Latvia can be

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[43] 'Baltic Association of the Historians of Pedagogy.' Available: http://www.baltichistorians.lu.lv/ index.php?id=3 (accessed 23 March 2017).

[44] A. Krūze, 'Leipcigas Universitātes profesors Dīters Šulcs – Latvijas Universitātes Goda doktors kopš 2002. gada' [Leipzig University professor Dieter Schulz – Honorary Doctor of the University of Latvia since 2002], in A. Krūze (ed.), *Laikmets un personība* [Era and personality], vol.15, Rīga, RaKa, 2015, pp. 279-294.

[45] 'Association for Teacher Education in Europe, University of Latvia, Institute of Education and Psychology,' in *ATEE Spring University 'Decade of reform: achievements, challenges, problems*, Rīga, Izglītības soļi, 2002.

regarded as a reference point for the readiness of Latvian scholars to join in discussions with researchers from all over Europe as equal partners.

Conclusion

Analysing development of pedagogy science in Latvia, we can confirm that from 1991 to 2004, interrupted continuity could be observed in the institutional, communicative, and methodological dimensions. Disregarding whether rule changed from democracy to totalitarianism or *vice versa*, the natural evolution of the development of pedagogy science was interrupted in Latvia, thus losing the succession of science development.

Nevertheless, pedagogy science in the 21st century is still developing comprehensively: the contribution of the community of Latvian scholars is not only in development of separate dimensions of pedagogy science – institutional, communicative, and socialisation – as it was under Soviet rule, but also in implementation of targeted development in all scientific dimensions. Initially, this development was implemented by returning to the conceptual space of Europe as well as mastering the current practices of higher education of Europe, but later, this occurred through establishment of modern scientific models that comply with the needs of a democratic state and form a sound basis for equal discussion with colleagues around the world. Along with the change of generations, the ideological implications created by the Soviet totalitarian regime are vanishing.

Changes in and the Maturation of the Science of Education in Lithuania

Ona Tijūnėlienė

Abstract. Afer 1990, trends, changes, and maturation of the Lithuanian science of education were affected by the reforms in the system of education and the ideas of lifelong learning. This research focuses on the changes and the development of the science of education in Lithuania from 1992 to 2004. The purpose of the study is to identify the attributes of change and development of the science of education by addressing the following: the concept of the science of education and changes in terminology and and the conception of the object and structure of research. The methods include historical-descriptive, partial comparison, analysis, and synthesis. The term 'pedagogy' was found to be too narrow to define the improvement of learning throughout a lifetime. Therefore, the term justified by Leonas Jovaiša, educology, was established: educology was considered a science that investigated permanently the education of individuals and groups. The creators of the science of education at the time included Leonas Jovaiša (1921–2017), Bronislovas Bitinas, Vanda Aramavičiūtė, Palmira Jucevičienė, and Juozas Vaitkevičius (1928–2002). Jovaiša considered pedagogy to be the nucleus of the science of educology; however, he also identified other branches. Moreover, he developed the concept of humans' long-life improvement. He defined educatonal reality as a totality of "finite educational events improving an individual," discrete and continuous. The indispensable conditions were the meeting of subjects and their disposition towards and openness to information and its exchange. Bitinas identified elements of educational reality and defined their relationships and characteristics. He noted that the object of educology was a cluster of education problems without strict boundaries. Educology also dealt with other sciences.

Keywords: educational science, educology, pedagogy, research object in the science of education

Introduction

After the restoration of Lithuania's independence in 1990, trends, trans-formations, and maturation of the science of education was affected by the rebuilding of the Lithuanian system of education on new foundations. The development of new models of education reform was related to 21st century expectations and oriented towards the educational experience of the democratic world. The drafting of "new era" documents was based on the provisions affecting the science of education: a) the individual's training at school was a cultural process; b) it was important to seek harmony of all levels of education and to ensure diverse educational integration; c) a holistic approach to the process of education and individuals were of the utmost importance;

d) knowledge conveyance was to be combined with the development of personal abilities and of moral and emotional culture; and e) the principal objectives of the individual's general education were to be related to fostering of competences necessary for life and professional activity.[1] Lithuanian scholars were able to resume traditions developed before 1940: "Lithuanian pedagogy and school were, and remained, enlightened and academic. That was the European, and especially German, influence. … all academic studies of the time were based on experimental data obtained by investigating the situation at school and in life practice."[2] Some influence also came from external factors due to the spread of the idea of lifelong learning of knowledge societies in Western countries, pursuing a new type of quality, and the findings of the latest research.[3]

Through their research, Lithuanian scholars sought to help practicing teachers better understand the process of education, its object, and its structure, as well as to master the functions of their activities. Leonas Jovaiša created a genetic system (theory) of the goals of integral education, identified the branches of educational science, justified a new definition of the science of education, and defined the structure of education.[4] Bronius Bitinas studied the structure of the object of the science of education, published studies devoted to the epistemology of educational reality, and laid the foundation for interdisciplinary educational research.[5] Vanda Aramavičiūtė focused on the concepts of education, its homegeneity and integrity, and compared the positions of Lithuanian and Western scholars.[6] Meilė Lukšienė wrote about the education of human beings in cultural contexts and human culture.[7] Marija Barkauskaitė investigated the science of education,[8] as did Elvyda Martišauskienė[9] and others.

This research focuses on the changes and the maturity of the science of education in Lithuania from 1992 to 2004. The purpose is to identify the attributes of the changes and the maturity of the science of education,

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[1] Ž. Jackūnas, *Lietuvos švietimo kaitos linkmės* [Lithuanian educational change convergent], Vilnius, Kultūros, filosofijos ir meno institutas, 2006, pp. 6-8.

[2] J. Vaitkevičius, *Lietuvos pedagogika ir mokykla istorijos vingiuose* [Lithuanian pedagogy and school history bends], Šiauliai, VšĮ Šiaulių universiteto leidykla, 2008, p. 61.

[3] P. Jucevičienė, *Ugdymo mokslo raida: nuo pedagogikos iki šiuolaikinės edukologijos* [Educational scientific developments from pedagogy to contemporary science of education], Kaunas, Technologija, 1997, pp. 11-15.

[4] L. Jovaiša, *Edukologijos* įvadas [Introduction of educology], Kaunas, Technologija, 1993.

[5] B. Bitinas, *Ugdymo tyrimų metodologija* [Educational research methodology], Vilnius, Jošara, 1998; B. Bitinas, *Ugdymo filosofija* [Philosophy of education], Vilnius, Enciklopedija, 2000.

[6] V. Aramavičiūtė, *Ugdymo samprata* [Concept of education], Vilnius, Vilniaus universiteto leidykla, 1998.

[7] M. Lukšienė, *Jungtys* [Connections], Vilnius, Alma Littera, 2000.

[8] M. Barkauskaitė, 'Profesoriaus Bronislovo Bitino mokslinių idėjų sklaida edukologijos moksle' [Dissemination of the scientific ideas of professor Bronislovas Bitinas in the science of education], *Pedagogika* [Pedagogy]*, no. 4, 2016, pp. 9-15.

[9] V. Aramavičiūtė, E. Martišauskienė, 'Ugdymo gelmių paieška Bronislovo Bitino pedagoginės minties lobyne' [Search for the depths of education in the treasury of B. Bitinas' pedagogical thought], *Pedagogika* [Pedagogy], no. 4, 2016, pp. 16-27.

addressing the following issues: the concept of the science of education and changes in terminology and concepts of the object and the structure of research on the science of education. I used historical descriptive, partial comparison, analysis, synthesis, generalisation, and abstraction methods. The research methodology was based on the following considerations. 1) Since the 19th century, philosophical hermeneutics has been trying to indicate the historical gap between the interpreter and the interpreted subject and to reveal respective meanings and ideas in the social and temporal context in which they were born.[10] 2) Jovaiša defined science as a system of empirically and theoretically verified and justified knowledge about an area of reality or the universe. Science also implied the activity through which new objective and systematised results of the reality cognition were obtained. The science of education reflected pedagogical reality and contributed to its improvement.[11] 3) In modern times, scientific theories and basic scientific arguments were explained as unavoidably hypothetical. In any area of science, the principal ideas about its research object changed in the process of history, as did the understanding of knowledge and science.[12] Scientific development research criteria included the terms and concepts of the science of education and formal establishment of a scientific discipline: the characteristics of establishment (rationality, reliability, fundamentality and applicability, and institutionalisation) and the status of the discipline (a clear object of study, its prospects, object stucturisation techniques, etc.).[13]

Due to the limited scope of the paper, the works of Leonas Jovaiša and Bronius Bitinas, who made the greatest contributions to the science of education during the transformation period between dicatorship and democracy, were chosen.

Nature and terminology of the science of education

As noted by Jovaiša, education is the most important "law" of the universality evolution, as everything that exists changes and shapes one another and takes out of the state of chaos. The shape of all becomes more perfect. This interdependence can be justified by laws of interaction.[14] Jovaiša makes humans stand out among other creatures as self-educating beings and calls self-education an innate matter. It is due to the innate spring of self-education (the rudiment of self-education) that makes humans sensitive and susceptible to environmental influences, providing them with a wide range of information.

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[10] A. Halder, *Filosofijos* žodynas [Dictionary of philosophy], Vilnius, Alma Littera, 2002, p. 84.

[11] L. Jovaiša, *Enciklopedinis edukologijos* žodynas [Encyclopedic dictionary fo educology], Vilnius, Gimtasis žodis, 2007, pp. 170-171.

[12] A. Halder, *Filosofijos* žodynas [Dictionary of philosophy], Vilnius, Alma Littera, 2002, p. 84.

[13] P. Jucevičienė, *Ugdymo mokslo raida: nuo pedagogikos iki šiuolaikinės edukologijos* [Educational scientific developments from pedagogy to contemporary educology], Kaunas, Technologija, 1997, pp. 11-15.

[14] L. Jovaiša, *Edukologijos* įvadas [Introduction of educology], Kaunas, Technologija, 1993, p. 5.

The information leads to responses (intellectual, emotional, of willpower, etc.) and as if "takes" man out of a closed inner life into an open-to-the-world system. He notes that the Latin word 'educare' best expresses the purpose of educology: the science of how to take humans out into this complex world,[15] so as to make them more perfect creatures. Self-educating humans remain spontaneous and creative through acquaintanceship with the spiritual (or intellectual) treasures of the world. Human nature is harmed by inappropriate education. People become more perfect when they develop the power of creation that brings them closer to "the essential principle of Universality, i.e. creation."[16] Thus, education is meant not only to introduce humans to the world, but it also enables them to create and to exploit all the possibilities of individual self-realisation.

Jovaiša saw the factors for the emergence of the term of 'educology' in the early 19th century, when Robert Owen (1771–1858) started training adults in Scotland. Adult education spread to Russia and to other countries. Articles on adult pedagogy began appearing. Johann Friedrich Herbart (1776–1841) named adult pedagogy 'andragogy'. In June 1965, experts meeting at UNESCO headquarters concluded that progress in all areas of life required a type of education that would last an entire working life ('permanent' in French and 'lifelong' in English). In Western countries, new ideas on the improvement of pedagogy of continuing education appeared. It became clear that the term 'pedagogy' was inappropriate for permanent human education as the object of permanent human education was an individual or groups of individuals of different ages, and the subject (problem) was the education of the individual or a group of individuals.

Jovaiša emphasised the role of the individual in the pursuit of perfection: improvement was predetermined not by education, as the actions of education meant only the provision of an individual by means of self-expression (an obligatory condition of self-expression). Improvement was predetermined by the self-educating nature of humans and their spiritual disposition. An appropriate base of education could give humans fullness of life. Since life was an intimate human interaction with the environment in which human nature was revealed, this represented the essence of education: "…through the intimate life of child, youth, and adult to create a higher outer and inner life … Thus education covered the management of daily living which enabled an individual to independently seek a higher physical and spiritual life corresponding to the ideals of family, nation, and society."[17] Education was the "creation of a fulfilling human life by one's own powers through providing one with the means of self-expression."[18]

Jovaiša rationally and logically justified the concept of becoming a full-fledged human being. He identified the areas of life in which the outer and

[15] L. Jovaiša, *Edukologijos* įvadas [Introduction of educology], Kaunas, Technologija, 1993, p. 5.
[16] Ibid.
[17] Ibid., p. 10.
[18] Ibid.

inner human life took place: natural, existential, practical, economic, social, cultural, psychological, and spiritual.[19] Next to the areas of life, Table 1 indicates the essentials of life and the functions of education which made up close unity and clearly demonstrated the opportunities of individual holistic education.

Table 1. **The essentials of life and the functions of education**

No.	Areas of life	Essentials of life			Functions of education
		Mind	**Creation**	**Morals**	
1	Natural	Activity	Independent action	Sensitivity	Enabling
2	Existential	Information	Self-expression	Safety	Care and provision
3	Praxial	Learning	Game	Work	Teaching
4	Economic	Competences	Organisation	Profit	Development
5	Social	Communication	Relations	Concord	Upbringing
6	Cultural	Science	Arts and technology	Customs	Education
7	Mental	Cognition	Emotions	Willpower	Training
8	Spiritual	Truth and faith	Beauty and hope	Good and love	Formation

The in-depth relations between those matters were best described by Jovaiša: "The merging of the essentials of life into a single framework provides the creation of a fulfilling life and the conditions for cultural and spiritual self-expression ... The functions of education are complementarily interrelated: the closest relations, arising from enabling, exist between teaching and training, between care and upbringing; formation covers qualitative improvement of innate human properties; it manifests itself in each function of education."[20] This allowed Jovaiša to formulate the definition of functional education: "Education means the enabling of man or a group of people that forms their new characteristics in the process of education, teaching, development and training, provision, care, and upbringing."[21]

Jovaiša explained that education covered all areas of life and was permanent. The science of pedagogy claimed all those areas, but it was restricted to the science of children and youth education. The term was inappropriate to define the education of people of all ages and to express the reality of education. The science of education covered the entire human life, requiring a new term, 'educology': "Educology is the science of studying permanent education of an individual or their groups."[22] The definition was justified through identification

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[19] L. Jovaiša, *Edukologijos* įvadas [Introduction of educology], Kaunas, Technologija, 1993, p. 13.
[20] Ibid.
[21] Ibid., p. 13.
[22] Ibid., p. 14.

of the branches of educology: a) *familistics* – the science of family, covering its educational functions; b) *pedagogy* (theoretical-general, didactic, hodegetics); pre-school (creche and kindergarten); school (general education, vocational, for children with special needs); c) *social educology* – adult (andragogy, retraining, professional development); community (protection/care, social management, counselling); local environment (leisure, parallel, alternative/open door; youth groups and organisations, progress schools); d) *cultural educology* (mass media, ethnological, religious, art institutions); e) *subculture educology* – delinquent (prevention, rehabilitation) and penitentiary (youth and adult). Jovaiša predicted the viability of those structures of science only if the successes of an appropriate educational policy and organisation could be predetermined by a contemporary science of management: "Education management has to become a central tool in the implementation of the ideas, programmes, and methods of educology because it covers issues of organisation and management of the structures of education, management of institutional activities, regulation of actors' relations, economy, and management of youth and adults."[23]

Thus, the term 'educology' was established in Lithuanian terminology in the 1990s. Its equivalents in English are *education* or *educational science* and in German – *Erziehungwissenschaft*. The more precise definition of *permanent* education was used in Poland and other countries.[24]

Jucevičienė published several works abroad on the establisment of the term educology in the Lithuanian science of education.[25] She justified the viability of the term by use of the word in publications in English: it could be found in documents of the Conference of the Research Network on Education held in Stockholm in 1996, in conference documents of the Network of Educational Science (NESA) in Amsterdam, and in several publications.[26]

To conclude, Jovaiša contributed to the development of the science of education and the establishment of a new term. He related the nature of education to intrinsic human powers – spiritual, physical, and intellectual – and justified the importance of their permanent improvement at different ages, as well as identifying the branches of the science of educology that corresponded to various age levels. Jovaiša created a rational, reliable, and fundamental theory of education in which he rationalised the opportunity for each individual to improve their inner and outer lives – to interact with all areas of life, to receive information, and to create a fulfilling life through the means of self-expression. The theory provided logical justification for the fact that the merging of the essentials of life into a single framework ensured creation of a fulfilling life

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[23] L. Jovaiša, *Edukologijos* įvadas [Introduction of educology], Kaunas, Technologija, 1993, p. 15.

[24] Ibid., p. 9.

[25] P. Jucevičienė, 'From Pedagogy to Educational Science, from Western Europe to Lithuania and from Lithuania to Western Europe,' in Ch. Wulf (ed.) *Education in Europe. An An International Task,* Münster/New York, Wachman, 1995, pp. 149-154.

[26] P. Jucevičienė, *Ugdymo mokslo raida: nuo pedagogikos iki* šiuolaikinės *edukologijos* [Educational scientific developments from pedagogy to contemporary educology], Kaunas, Technologija, p. 20.

and conditions for cultural and spiritual self-expression, while the qualitative improvement of the characteristics of human nature manifested itself in each function of education. Jovaiša's theory of education was significant for the development of research and the practice of education.

The object of the science of education and its structure

As emphasised by Jovaiša, one of the key objectives of epistemology was the identification of the researched scientific object. The author defined it as educational reality, i.e. the process in which personality continuously matured, and explained it as a special phenomenon, described its development, and identified the structural components and specific attributes. He also discussed the possibility of seeing and observing it with the aim of empirical research. To start with, education happens when educator and learner meet. The 'meeting' is an indispensable condition for the 'educational event' to happen; the event results in spiritual and physical changes in an individual. He defined the meeting as a finite, yet recurring act consisting of a certain definite number of events. However, when watching from the side, it is impossible to establish whether all the events are educational as one can see only the external picture of the event while the internal one remains hidden. Education takes place only in the case when internal events promote changes in an individual. Therefore, the probability of coincidence of external and internal events is never clear until special research is carried out.[27] Educational reality is defined by Jovaiša as a discrete, discontinuous, and processual – "a totality of educational events improving an individual."[28]

Typically for educational reality, an event is 'a process of interaction', and it has internal content and meaning, not merely a visible external picture. The content of the event consists of a quantity (quantum) of information that is wealth. In the process of an educational act, epistemic, practical, technological, and evaluative information reveals itself: the source of the first is science; of the second, the way of evaluation; and of the third, the value of action, philosophy, and morals. All that wealth becomes objective only when it acquires social significance. It can direct human activity in one or another way. Therefore, an event as a component of the reality of education is always concise and meaningful and has specific educational value.[29]

A meaningful characteristic, which does not, however, predetermine the character of educational reality, is the fact that education takes place in space and time. Its space (structure) is a microenvironment (family, group, class, another group), macroenvironment (society, its culture, the whole world), and meta-environment (spiritual values). All types of environment are limited

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[27] L. Jovaiša, *Edukologijos* įvadas [Introduction of educology], Kaunas, Technologija, 1993, p. 150.
[28] Ibid.
[29] Ibid., pp. 148-149.

by geographical, cultural, and national contexts. The time of the educational process is also limited by an epoch or the duration of intensive education or human life. Time and space affect the quantity and quality of educational information.

Educational reality is characterised by a specific change of events. Jovaiša indicates the conditions that define that specificity and that are necessary for education to take place: educational meeting of subjects; disposition and openness to information; and exchange of information. Other conditions predetermining educational events include specific material, objective and cultural, biological and social 'situation of events', and a general spiritual 'atmosphere' of events.[30]

Jovaiša attached great value to the educational meeting of subjects in which educational interactions and individual relations begin: subject – subject and subject – object relations (knowledge, ideas, thoughts, and ideals). They predetermine the value of the content and the character of the participants' meeting. The quality of relations depends on the innate and acquired characteristics of the subject (temperament, abilities, intellect, emotions, experience and knowledge, attitudes, interest, stable and situational motivation, preconceptions, etc.). The value of the meeting depends especially on the specific emotional state invoked and afterwards, the intellectual state. The latter regulates the quality of the emotional state and its value for spiritual activity; positive emotions remove subconscious barriers to productive educational impacts. Emotions present a principal condition for succesful education; therefore, the teacher's first objective is to evoke and maintain learners' positive emotions to boost their self-confidence. An educational event, i.e. the exchange of educational information, will never take place in the case of deformed communication.[31]

As noted by Jovaiša, the exchange of information is impossible in the case of 'subject-object' relations as the learner will get one-directional information. However, efficiency of information perception, processing, and response depends on the state of emotions, the data of the intellect, and efforts of willpower (from psychophysical disposition and spiritual openness to wealth): "…psychophysical tension is necessary; otherwise, no efficient mastering will happen … The combination of tension and relaxation is unavoidable."[32] As the learner receives information from living people, they can also exchange information – experiences, emotions, ideas, and thoughts. In such cases, the intellect of the interacting participants is developed, emotions are corrected, and comprehensive maturity of personality takes place. Jovaiša exalts the role of educator, as nobody can replace him.[33]

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[30] L. Jovaiša, *Edukologijos* įvadas [Introduction of educology], Kaunas, Technologija, 1993, p. 151.
[31] Ibid.
[32] Ibid., p. 152.
[33] Ibid.

Another condition of the process is a 'situation.' One kind of situation happens when learners use immaculate or disorderly aids: they learn in one way when faced with too difficult tasks and in another when faced with too easy tasks.

Great significance is attached to spiritual events. Optimal pedagogical interaction requires a common spiritual elevation of subjects: "The spiritual atmosphere is not merely an inclination or a psychological climate; it is characterised by overstepping the daily concerns or individual existential needs and elevation to a higher world, to the area of cultural and spiritual values in which an individual shall immerse, detached from the daily routine. Such a transcendental state of a pedagogical meeting is an ideal condition for the emergence of educational events."[34]

In the structure of educational reality, Jovaiša identified the techniques, which caused educational events to happen and the different ways educational information is transferred and received.

As summarised by Jovaiša, educational reality consisted of 1) an educational informative event, 2) a material and spiritual environment, 3) the conditions of education, and 4) aids, techniques, and methods. "To get to know it, one needs to investigate all those components."[35] Its description proved that the educational process had internal and external, or subjective and objective, parts.

To conclude, Jovaiša contributed to changes in the science of education and its status: he clearly defined the research object (educational reality), structurised it logically, described the in-depth relations of the external and internal (objective and subjective) parts, and identified the criterion for the identification of an educational event – personal improvement. He also emphasised the role of relations and emotions for the emergence of an optimal pedagogical interaction and created the opportunities for promising scientific research.

The concept of the research object in the science of education was enriched with innovative ideas by Bronius Bitinas. He believed that each science looked for its object in a specific reality by abstracting from some of the attributes of that reality: "Thus, the object of the science shall not be identified with the reality. Therefore, the classical statement that pedagogy is a science about education is not precise from the viewpoint of the contemporary theory of scientific cognition: education is a reality open to a number of sciences, while the science of educology deals with one (essential) aspect of education."[36] In the reality of education, Bitinas identified five levels:

1) Societarian level whose essence it is to create the conditions necessary for the education of the society members. Legal regulation is especially important;

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[34] L. Jovaiša, *Edukologijos* įvadas [Introduction of educology], Kaunas, Technologija, 1993, p. 152.

[35] Ibid., p. 158.

[36] B. Bitinas, 'Apie edukologijos mokslo objektą' [On the object of educology science], *Socialiniai mokslai: Edukologija* [Social Sciences: Educology], vol. 1, no. 5, 1996, p. 54.

2) Social educological level, which is the functioning of institutions necessary for education. It is important to create a system of education in which all the institutions carry out a public commission in close cooperation;

3) Institutional level whose most important aspect is organisational. This means each institution is regarded as an organisation seeking to optimise the activity of the participants in the education process. Successful education is a precondition for the improvement of society;

4) Interpersonal level, which deals with the interaction of educator and learners. Its content consists of flows of educational information. First, the conveyance of information summarised by humanity to learners, and second –feedback. The flows create an educational environment that leads to the optimisation of the learners' self-evolution; and

5) Intrapersonal level in which educational interaction is understood as the individual's self-improvement. Self-improvement acquires its pure shape only at the specific level, which characterises the efficiency of all levels.

Bitinas formulated the criteria for recognition of educator and learner and revealed which interpersonal interactions were to be attached to the sphere of education and how education was related to other spheres of spiritual existence. Contemporary conceptions of education were based on an assumption that each individual educated him or herself and improved throughout life, so she/he remained the object (and the subject) of education throughout all the stages. All pedagogues of educational institutions and sports coaches belonged to the sphere of education, and educational functions were performed by families, mass media, and the arts. Education was organised also by imprisonment institutions, psychological services, etc. The number of the educational interaction participants was not limited, but a positive goal for the activity was a must: "…individuals' interactions were educational when one person by her/his activity sought to improve the personalities of other individuals."[37]

Bitinas disclosed how educational interaction manifested itself: in practice, it was recorded as 'an event', 'a pedagogical meeting', or 'an act of education.' To be able to call an act an educational phenomenon, it had to repeat. As the interaction was individual, its essence and what was invariant had to repeat. That proved that education was not a pure phenomenon; it was an outcome of cognitive activity. The phenomenon could be investigated and described, and the factors predetermining it could be established.

In educational reality, Bitinas held educational processes to be of the greatest importance: "Structurally the process is a purposeful sequence of the states of the educational interaction."[38] The process was always purposeful; it was a self-regulating system. Therefore, the educator, as a participant of the process,

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[37] B. Bitinas, 'Apie edukologijos mokslo objektą' [On the object of educology science], *Socialiniai mokslai: Edukologija* [Social Sciences: Educology], vol. 1, no. 5, 1996, p. 54.
[38] Ibid., p. 55.

regulated the improvement of learners inside the system. That defined the closed nature of the system. Moreover, Bitinas characterised the educational process as stochastic and hierarchical: stochasticity was the probability of relations of the educational process components and hierarchy meant that "in the structure of education, the higher level was the probabilistic outcome of the functioning of the lower level, while the lower level was the condition of the functioning of the higher level, i.e. the relation between the educational levels was not linear."[39] Those characteristics meant that the educational process was weak: it was not a stable system. The system could be deformed by side effects and turn its development in a direction harmful to the personality. Outcomes of such processes could be predicted only stochastically: "This characteristic of the educational process is preconditioned by its nature."[40]

Bitinas considered the aims and the content of education to be the most important components of educational interaction. The nature of information in the educational process and its impact on personality self-development depended on them. The aims and the content of education could only be perceived by knowing the concept of education as the relation between educational information and the processual aspect of education could be explained as the relation of the content and the form; both made up a totality. "Educational information is a dynamic and constantly changing aspect of education, while the processual structure defines a system of sustainable relations of the educational reality."[41] Thus, "educational phenomena and processes make up the nucleus of the object of the sciences of educology."[42]

As Bitinas explained, there was a periphery around the nucleus of the object –the problems of education. Along with educology, they were dealt with by other sciences of education such as the philosophy, physiology, psychology, sociology, ethnology, demography, politics, economics, management, and history of education. Therefore, the object of the science of educology was a cluster of educational problems with no strict boundaries: "Due to such openness, one can more comprehensively get to know educational reality, i.e. to more perfectly design, create, and manage it."[43] Bitinas was the first in Lithuania to justify the opportunities of multidisplinary research on education and to implement the idea: he wrote the *Philosophy of Education,* which focused on the epistemological aspect of educational reality.[44]

To conclude, Bitinas expanded and enriched the concept of the object in the science of education: he defined the components of educational interaction, the criteria for the recognition of educator and learner, identified the characteristics of the educational process, and justified the unity of

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[39] B. Bitinas, 'Apie edukologijos mokslo objektą' [On the object of educology science], *Socialiniai mokslai: Edukologija* [Social Sciences: Educology], vol. 1, no. 5, 1996, p 55.
[40] Ibid.
[41] Ibid.
[42] Ibid.
[43] Ibid.
[44] B. Bitinas, *Ugdymo filosofija* [Philosophy of education], Vilnius, Enciklopedija, 2000.

the content of education and the processual aspect, as well as the nucleus of the science of educology and the periphery of the object around it, i.e. the cluster of education problems having no strict boundaries, thus, he opened up an opportunity for new fields of research in Lithuania and for multidisciplinary research of education problems. Bitinas' ideas are basic and formulated at a high level of abstraction, most frequently of philosophy. The significance of Bitinas' research was shown through the dissemination of his ideas in the global scientific community. In *Thomson Reuters Web of Science Cited Reference Search*, he was cited 56 times, as well as in the Scopus database, while in the Lituanistika database, he was cited 923 times from 2000–2013.[45]

Conclusion

The changes in the science of education and its maturation in Lithuania from 1992–2004 were proved by the following:

1) The development of the nature/concept of the science of education, predetermined by the idea of permanent learning and its implementation. The term 'pedagogy' became too narrow to define educational reality. The new term of 'educology' was justified. The nature (concept) of the science of education was related to discontinuous improvement of innate human powers, and the branches of the science of education corresponding to age stages were justified.

2) A unique, basic conception of improvement of the inner and outer human life was created, in which, based on the principles of integrity and systematicity, the following components were merged into a homogeneous foundation: areas of life (where all the human life, both inner and outer, took place) with which man interacted and acquired the opportunity to improve; the foundations of life (mind, creation, morals); and the functions of education. As demonstrated by the concept, education ensured continuous improvement of innate human characteristics corresponding to human nature as integral beings and their function as creators.

3) A clear and promising research object was defined and logically structurised; the in-depth relations of the external and internal (objective and subjective) parts of the educational process with their own microstructures were identified; a criterion for the cognition of an educational 'event', i.e., personal improvement was established; and the role of relations and emotions for the emergence of an optimal pedagogical interaction was disclosed.

4) The criteria for recognition of educational interaction, educators, and learners were formulated in a scientifically-justified way, the relationship

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[45] M. Barkauskaitė, 'Profesoriaus Bronislovo Bitino mokslinių idėjų sklaida edukologijos moksle' [Dissemination of the scientific ideas of professor Bronislovas Bitinas in the science of education], *Pedagogika* [Pedagogy], no. 4, 2016, pp. 9-15.

between education and other spheres of spiritual existence were established; characteristics of the educational process, the purposeful sequence of the states of the educational interaction as a self-regulating system were identified (purposefulness, a closed nature, stochasticity, hierarchy, instabilility, and the outcome probability). The nucleus of the sciences of educology, i.e. the phenomena and objects of education, was established, as well as the periphery of the object around the nucleus, e.g., a cluster of problems without strict boundaries that opened up to integrate the opportunities of different sciences in the investigation of education problems. Moreover, the concept of education was specified: education was a reality open to a number of siences, while the science of educology dealt with one essential aspect of education. The characteristics of institutionalisation of the above-discussed ideas of the science of education in Lithuania are the following: rationality, reliability, fundamentality, and applicability.

From a Separate Special Education to an Inclusive Education Paradigm in Estonia

Vadim Rõuk and Ene Mägi

Abstract. The objective of this article is to substantiate and outline attitudes for equality policies and practice for disabled students in Estonia from 1991–2004. It outlines the legislative context, positive steps that have been taken, and the gaps that remain in the country's laws. Upon gaining its independence from the Soviet Union in 1991, Estonia had to cope with multiple tasks to overcome economic and social instability. We examine the historical and contextual point of view of documents, legislative acts, and practical developments in educational inclusion based on the theoretical background of understanding disability. This article discusses also how Estonia's government pursued the international policy of protecting children's rights, especially the rights of disabled children, by developing necessary legislature to get education for special needs pupils and involving them in society as equal members. Our article demonstrates that the rights-based approach to education in Estonia is based on all human rights principles. The right to and opportunity for education and employment are confirmed. Student selection for curricula at different levels is carried out using pedagogical methods, not medical ones. The diagnosis-based designation/labelling of learners in daily communication has been abandoned. Movement between different curricula and forms of study has been enacted. Co-teaching of all children, teaching in an inclusive context, was set as a national task in Estonia in 2004: how to teach a broadly diverse student body, one that has not only pupils with special needs, but various talents, propensities, language barriers, etc. so that students in the classroom achieve good results equally.

Keywords: special needs, medical model, social model, integration, inclusion

Introduction

The inclusive education paradigm is based on the modern definition of disability by the World Health Organisation (WHO) and the American Association on Intellectual and Developmental Disabilities, which define disabilities in a functional and contextual way.[1] The World Declaration on Education for All (adopted in Jomtien, Thailand in 1990) sets out a general vision: universalising access to education and promoting equity for all children. The major impetus for inclusive education was given at the World Conference

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[1] World Health Organisation, 'Disabilities.' Available: http://www.who.int/topics/disabilities/en/ (accessed 18 May 2018).

on Special Needs Education – Access and Quality – held in Salamanca, Spain in June 1994.[2]

There are two main models that have influenced modern thinking about disability – the medical model and the social model.[3] Historically, disability has been a segregating phenomenon and people with disabilities have been considered different. Disability has been conceptualised and measured differently in various countries.

The medical model of disability sees disability as a problem of the person, caused directly by disease, injury, or other health conditions that requires individualised treatment. In this case, the main issue is access to medical care. The main response on the political level is the revision or reform of health care policy.[4] In the 1950s, a functional perspective of illness was developed based on Parsons' sociological paradigm,[5] which states that the social world exists as a whole: social institutions and health care professionals have the right to check people's health and treat the patient until he or she is fully functional again.

The social perspective of disability developed in the 1960s and originated with a social-political movement that defines disability as a product of social and physical environment. This model emphasised that disability is not an individual issue or the person's personal problem: in order to improve their quality of life, it was necessary to change social attitudes, institutions, and policies.[6]

In recent decades, representatives of movements of people with disabilities and social and health researchers have emphasised the role of social and physical barriers; that is, a change from the medical model to the social model which sees disability as caused by society and not by changes within a person's body.

Besides problems of insufficient understanding of the implications of inclusive education in Estonia, many problems in implementation are caused by belief systems and practices that belong to a special education paradigm and continue to be used in inclusive education such as static assessment procedures

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[2] 'World Conference on Special Needs Education: Access and Quality,' in *Salamanca Statement and Framework for Action on Special Needs Education*, 1994. Available: http://www.right-to-education. org/sites/right-to-education.org/files/resource-attachments/Salamanca_Statement_1994.pdf (accessed 18 May 2018).

[3] M. Ainscow, T. Booth, *Index for Inclusion: Developing Learning and Participation in Schools*, Bristol, Centre for Studies on Inclusive Education, 2002. Available: http://www.csie.org.uk/ resources/inclusion-index-explained.shtml (accessed 18 May 2018); M. Ainscow, D. A. Tweddle, *Preventing classroom failure: and objectives approach*, Chichester, John Wiley & Sons, 1979.

[4] '*Ülevaade seadusandliku ja täidesaatva riigivõimu ning kohalike omavalitsuste õigustloovate aktide kooskõlast põhiseaduse ja seadustega*' [An overview of the conformity of legislative and executive power's and local government's legislative acts with the Constitution and laws], *Riigi Teataja* [State Gazette], 2005. Available: https://www.riigiteataja.ee/akt/945214 (accessed 18 May 2018). The situation regarding the right of pupils with special needs to basic education is addressed in Part III 'Legal administrator – supervision activities.'

[5] T. Parsons, *The Social System*, London, Routledge & Kegan Paul, 1951.

[6] M. Oliver, B. Sapey, *Social Work with Disabled People*, Basingstoke, Palgrave Macmillan, 2006.

and labelling based on medical models of disability. The social model develops inclusive schooling, partnerships with communities, and parental involvement.

The concept of educational special needs and its development are complex as a whole and influenced by a variety of ideologies and movements. The use of the phrase "special educational needs" in a White Paper in Great Britain in 1980 boosted the demand to remove labeling in the context of the education system – grouping and classifying students – set an example for other European countries. The most important task should be identification of the specific educational needs of the child, but classifications based on the existing medical model do not make it possible to clearly identify the precise needs of the learner in the context of the education system.[7]

The purpose of this article is to substantiate and outline attitudes on equity policies and practices for disabled students in Estonia from 1991–2004. What were the political challenges and legislative steps introduced to support change in attitudes towards disabilities and inclusive education, and what were the ideals and what practical steps took place in inclusive education during the first decade of regaining independence?

We use historical analysis of legislative acts and other documents as well as research to understand and generalise the matter of changes.

Challenges for policy-makers – attitudinal changes and policy development

Reforming legislation to support inclusive education. The Education Act came into force on 30 March 1992,[8] before the Constitution of the Republic of Estonia was adopted.[9] The preconditions for this were created by *perestroika* in the late 1980s and the struggle to build a society based on democracy. Article 12 of the Constitution explicitly prohibited discrimination: "Everyone is equal before the law. No one can be discriminated against on the basis of nationality, race, colour, sex, language, origin, religion, political or other views, property or social status, or on other grounds."[10] This paragraph did not specifically include disabilities but is covered by the term "other circumstances." Section 28 provided that people with disabilities were under the special care of state and local governments.

Estonia is a signatory of many international agreements on human rights, rights of persons with disabilities, and rights to education and employment. Estonia ratified the United Nations Convention on the Rights of the Child in 1991 as a reference document for future activities in protecting children's

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[7] K. Wedell, 'Concepts of Special Educational Needs,' *Journal of Research in Special Educational Needs*, vol. 3, no. 2, 2003, pp. 104-108.

[8] 'Republic of Estonia Education Act,' *Riigi Teataja* [State Gazette], 1992. Available: https://www.riigiteataja.ee/en/eli/ee/Riigikogu/act/506012016003/consolide (accessed 18 May 2018).

[9] 'Constitution of the Republic of Estonia,' *Riigi Teataja* [State Gazette], 1992. Available: https://www.riigiteataja.ee/en/eli/ee/rhvv/act/521052015001/consolide (accessed 18 May 2018).

[10] Ibid., Paragraph 12.

education and health and the Salamanca Declaration in 1994, which affirms that "schools should accommodate all children – regardless of their physical, mental, social, emotional, linguistic or other conditions."[11] Estonia signed the UNESCO Declaration on Education for All in Dakar in 2000 and other related agreements.[12]

In light of international agreements, the use of terminology in the area of special needs was critically evaluated. The Education Act (1992) had abandoned Soviet-era definitions and terminology such as 'anomalous children', 'defective children', 'invalids', and 'handicapped' and replaced them with *hälvik or hälviklapsed* (child with deviations), which was only cautious distancing from the previous, in a linguistic sense.[13] However, the meaning is degrading, rather disparaging, and poorly translated. Estonian society still needed time to abolish labelling and discriminatory terminology for human beings, as well as its use in everyday life through contracts and extended cooperation and agreements with national treaties.

In 2004, the term 'child/person with special needs' replaced 'child with deviation' in the 1992 Education Act, the 2010 Basic Schools and Upper Secondary Schools Act, and in all other acts and regulations.[14] The term 'special educational needs' was not clearly defined in Estonian legislation until 2004. However, several factors ensured that the term 'special educational needs' was used for those learners: international co-operation, the need to be understood and to ensure that the school functioned as an educational institution, rather than as a medical institution.

Ideal and practical renewal processes. At the start of intense educational reforms (1987), Estonia had about 13 000 children in special education, including 2200 in special groups in kindergartens.[15] They were all categorised as 'defective' and 'anomalous' children on the basis of disabilities required for attending special schools and classes. Children with more severe intellectual and physical disabilities, who were recognised as incapacitated, were concentrated in social welfare institutions – a total of 450 children and young people in 1987.[16]

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[11] 'World Conference on Special Needs Education: Access and Quality,' in *The Salamanca Statement and Framework for Action on Special Needs Education*, 1994, p. 6. Available: https://www.right-to-education.org/sites/right-to-education.org/files/resource-attachments/Salamanca_Statement_1994.pdf (accessed 18 May 2018).

[12] *The Dakar Framework for Action: Education for All: Meeting our Collective Commitments*, Dakar, World Education Forum, 2000. Available: https://unesdoc.unesco.org/ark:/48223/pf0000121147 (accessed 18 May 2018). Estonia also adopted the UN's 'Principles of Standard Rules for Equal Opportunities for People with Disabilities' on 16 May 1995.

[13] 'Republic of Estonia Education Act,' *Riigi Teataja* [State Gazette], 1992. Available: https://www.riigiteataja.ee/en/eli/ee/Riigikogu/act/506012016003/consolide (accessed 18 May 2018).

[14] Ibid.; 'Basic Schools and Upper Secondary Schools Act,' *Riigi Teataja* [State Gazette], 2010, Article 93 (3). Available: https://www.riigiteataja.ee/en/eli/ee/Riigikogu/act/521062016007/consolide (accessed 18 May 2018).

[15] E. Veskiväli, J. Kõrgesaar, *Eripedagoogika Eestis. Eripedagoogika tänapäeväküsimusi* [Special education in Estonia. Today's issues], Tartu, Tartu Ülikool, 1987, p. 15.

[16] Ibid., p. 16.

Estonia was the first in the Soviet Union to introduce special education classes in the 1970s in which special needs students were prepared to re-integrate into regular classes[17] and these were not completely eradicated. Traditional Soviet logopaedic classes were being replaced with remedial classes because similarities were observed in the background of these learning difficulties. The choice of the type of school was decided by medical-pedagogical committees and based primarily on the child's medical indicators. Special educators, specialists in 'defectology', and scholars were evaluated as teachers and specialists for special schools and classes. The philosophy and approach that supported special education as the best means to offset limitations associated with disability still drove the thinking and actions associated with disabled children at the end of 1980s and was criticised by leaders of education renewal.[18]

Perestroika opened the doors for various types of foreign assistance, further training, and exchanges of experience. It was foreign donors who noted the enormous social and educational segregation: separation of people with disabilities from community-based institutions, disability-differentiated school network, and labelling terminology mixed with medical categories in everyday practice. In a renewed situation, the debate about the need for equal treatment of people and the shortcomings of the current organisation of the state, including health and education, was intensified.

The beginning of the educational-innovative movement can be attributed to the Congress of Estonian SSR Teachers in March 1987. Following the Congress, working groups developed rapidly that initiated the conference of educators convened in 1988, which formulated the Estonian Educational Platform.[19] In 1997, Educational Scenarios of Estonia[20] were created. 'Learning society' became the keywords, and the desired educational strategy was named 'Learning-Estonia': the goal was to create and actualise educational concepts that reflected the real needs and interests of society and its members.[21]

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[17] F. Eisen, *Tasandusklasside organiseerimisest ja tööst õpilaste ajutise mahajäävuse likvideerimiseks Eesti NSV-s* [On organisation of levelling classes and work for liquidation temporary retardment of pupils in the ESSR], manuscript, 1972, Estonian Pedagogical Archives-Museum, K0045447-1, p. 23.

[18] P. Kreitzberg, 'Mis suunas liigub hälvikõpe?' [In which direction is the education of the disabled moving?], *Edasi* [Newspaper 'Edasi'], 26 March 1989.

[19] E. Kareda, et al. (eds.), *Main Principles for Reorganization of the Public Education in Estonia,* Tallinn, In-Service Teacher's Training Institute of Estonia, 1989.

[20] K. Loogma, R. Ruubel, V. Ruus, E-S. Sarv, R. Vilu (eds.), 'Estonia's Education Scenarios 2015. The 21st Century Learning Initiative.' Available: http://www.21learn.org/activities/events/estonias-education-scenarios-2015/ (accessed 27 June 2017).

[21] 'Eesti Haridusfoorumi tegevusest 1995–2015. Vaade tulevikku' [Activities of the Estonian Education Forum 1995– 2015. View to the Future], in *Eesti Haridusfoorum* [Estonian Education Forum], 2015. Available: https://www.haridusfoorum.ee/14-meist/97-eesti-haridusfoorumi-tegevusest-1995-2015-vaade-tulevikku (accessed 27 June 2017).

Estonian schools and the road to inclusive education

The gradual introduction and correction of legislation in the field of education showed the goodwill of the state to increase coherence, tolerance, and sustainability at both the individual and national levels. Each society needed to consider the traditions and beliefs of its past in terms of how people with disabilities were named and placed in society to make corrections for the future.

Until regaining independence, a segregated education system was implemented as the only option for children with special needs. In independent Estonia, this was seen as a discriminatory, marginalizing, and a decaying organization that was not suited to the new values and the concept of human rights.

Gradually, the term 'integration' replaced 'segregation', which characterises the process of inclusion children with special needs during the period under review. Having recognised the history of segregation, integration was formulated as a programmatic principle in new social practice and institutional reforms in Western societies in the 1960s.[22] The reforms had three core principles:

1) The right to schooling and education for disabled children. There were groups of children who didn't have this right due to their disabilities;

2) The right to education in local schools for disabled children was originally formulated as an attack on centralised institutions established as special schools for designated categories (e.g., the separate special school system); and

3) Total reorganization of the special education system, focusing on all aspects from the identification of its clients to financial issues and finally followed by integration.[23]

By 2004, the right to education for all children with special needs was guaranteed by law. School organisation included children with learning difficulties and children with disabilities to be integrated into mainstream schools in 1999–2000. Meanwhile, segregating elements were noted in the content, form, and name of the assistance provided. For example, children with learning difficulties could be provided with assistance in the "leveling" class or correctional group. In schools, including special schools, the scope and organization of support varied, but the needs of the learners were similar. Moreover, naming the type of assistance sooner labelled rather than supported the children.[24]

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[22] L. Vislie, 'From Integration to Inclusive: Focusing on Global Trends and Changes in Western European Societies,' *European Journal of Special Needs Education*, vol. 18, no. 1, 2003, p. 18.

[23] Ibid., p. 20.

[24] '*Ülevaade seadusandliku ja täidesaatva riigivõimu ning kohalike omavalitsuste õigustloovate aktide kooskõlast põhiseaduse ja seadustega. Õiguskantsler, peatükk* III, 2005' [An overview of the conformity of legislative and executive power's and local government's legislative acts with the Constitution and laws, Chancellor of Justice, chapter 3, 2005], *Riigi Teataja* [State Gazette]. Available: https://www.riigiteataja.ee/akt/945214 (accessed 18 May 2018).

The Estonian Vocational Educational Institutions Act contained separate provisions aimed at enabling people with disabilities to study vocational education.[25] It led to an increase in the number of special needs students in vocational education: by 1998–1999, there were ten special classes for special needs students in vocational education institutions with a total of 197 students, most of whom had intellectual disabilities.[26]

During these years, the number of special needs children increased in regular schools, professional counselling improved, and tolerance towards people with special needs developed. A change in attitude and national measures, such as the doubling of the upper limit for general expenses for special needs pupils in vocational education and training in comparison to those in the "ordinary" classroom, resulted in more special needs students enrolled in vocational training: in 2002–2003, there were almost 300 students with special needs in 22 of 81 vocational schools.[27]

Laws governing the education of children with special needs allow identification of two classifications. The first was physical special educational needs arising from health, the content/diagnosis of which required teaching either at a different level in the curriculum[28] or study at a special school and special needs support applied – speech therapy, studying in a remedial class, or receiving remedial lessons. The second defined special educational needs arising from adaptation and behavioural difficulties, including individualised curriculum, psychological counselling, levelling classes and correctional training, and special schools. Special education could be provided in special classes in regular schools – remedial classes for children with learning difficulties, support classes for children with mild intellectual delays, subsistence classes for children with moderate under-development, and care classes for children with severe intellectual development delays.[29]

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[25] 'Vocational Educational Institutions Act', 2013, *Riigi Teataja* [State Gazette]. Available: https://www.riigiteataja.ee/en/eli/504022014002/consolide (accessed 18 May 2018).

[26] *Rights of People with Intellectual Disabilities: Access to Education and Employment in Estonia: Monitoring Report*, New York, Open Society Institute, 2005, pp. 66-67. Available: https://www.opensocietyfoundations.org/sites/default/files/estonia_2005_0.pdf (accessed 18 May 2018).

[27] Leelo Ainsoo (Astangu Vocational Rehabilitation Centre employee and former department leader), interview by Ene Mägi, 2004, Personal archives of Ene Mägi.

[28] 'Approval of a Simplified Curriculum for Basic Schools. Minister of Education Regulation No. 21 of 24.03.1999', *Riigi Teataja* [State Gazette]. Available: https://www.riigiteataja.ee/akt/12743986 (accessed 28 March 2016).

[29] 'Basic Schools and Upper Secondary Schools Act', *Riigi Teataja* [State Gazette], 01.09.2010. Available: https://www.riigiteataja.ee/en/eli/ee/Riigikogu/act/521062016007/consolide (accessed 10 October 2018); 'Põhikooli lihtsustatud riikliku õppekava (abiõppe õppekava) kinnitamine' [Approval of simplified basic school curriculum], *Riigi Teataja* [State Gazette], 24.03.1999. Available: https://www.riigiteataja.ee/akt/792367 (accessed 28 October 2018). Next versions of 2002, 2004 etc. were the most complete acts became into force in 2010. See 'Põhikooli lihtsustatud riiklik õppekava' [Simplified basic school curriculum], *Riigi Teataja* [State Gazette], 28.12.2010. Available: https://www.riigiteataja.ee/akt/128122010014 (accessed 28 October 2018). The possibility of individualised curriculum was present in all projects and versions of National Curriculum since 1989.

The feature of inclusive education in this arrangement was a common learning environment, socialisation with peers in the neighbourhood, sharing school resources, and family proximity. The Learning-Estonia strategy paper included the sub-theme 'The teacher is the key', which highlighted the key role of the teacher in changing the education system.[30] Updated teacher training curricula included specifics of teaching children with special needs on the basis of the nature of the disability. Specialists were being prepared at Tallinn University and the University of Tartu.[31]

The national 'coping' curriculum was adopted at the end of 1999 by the Ministry of Education[32] and renewed in 2002. A coping curriculum – a simplified version of the regular curriculum – was needed because of maximum educational obligations for learners with various abilities and needs. The preconditions for differentiation of curricula evolved due to changes in attitudes in society that supported these changes. Special needs people explained their needs and opportunities to the public: national social policies, parents' associations, and external training had created the basis to look at people with special needs, including children, as full-fledged members of society.

The National Curriculum for children with moderate intellectual disabilities was designed similarly for every grade as for the regular curriculum. Curriculum objectives emphasised preparation of children for an independent life (as much as possible), development of personal talents, and sustainability of education.[33] The legal necessity to differentiate teaching according to the needs of the learners led to more careful studies of children, involvement of parents, and a more tolerant society in order to facilitate the learner's actual needs. As a result, a new trend emerged – the number of children with special educational needs in regular schools increased.

The number of pupils with special needs in schools of general education increased year by year: by 2006, 84,6% of special needs pupils studied in general education schools.[34] The number of students with special needs increased most in "ordinary" classes in regular schools, indicating acceptance of inclusive education by schools and the general public. The number of home-schooled children or absent from education is unavailable as data transmission and storage by the Estonian Education Information System only began in 2004: the exact number of children with special needs prior to 2004 is not known, so

[30] Õpi-Eesti 2001 [Learning Estonia 2001], Tallinn, Ministry of Education, 2001, p. 10.

[31] K. Kukk, *Erivajadused hariduses, kokkuvõte* [Special needs in education, summary], Tallinn, Haridus – ja Teadusministeerium, 2004. p. 10.

[32] 'Toimetuleku riiklik õppekava' [National Coping Curriculum], *Riigi Teataja* [State Gazette], 15.12.1999. Available: https://www.riigiteataja.ee/akt/81091 (accessed 28 June 2018).

[33] 'Põhikooli lihtsustatud riiklik õppekava' [Simplified Basic School Curriculum], *Riigi Teataja* [State Gazette], 16.12.2010. Available: https://www.riigiteataja.ee/akt/128122010014 (accessed 28 October 2018).

[34] H. Kanep, *Analüüs haridusliku erivajadusega õpilastest ja tugiteenuste kättesaadavusest õpilastele. Lõpparuanne.* [Analysis of pupils with special educational needs and availability of support services for students. Final report], Haridus- ja Teadusministeerium, 2008, p. 16. Available: http://dspace.ut.ee/bitstream/handle/10062/40911/Uld_HEV.pdf (accessed 25 May 2018).

no comparable data exists. Moving towards inclusive education more attention was paid to terminology used at the educational area. The medical terms that were largely used before general ones replaced them were sometimes too general to cover the specific needs of learners. For example, the term 'multiple disability' does not indicate the specifics of the student's special needs, and the term 'learning difficulties' requires a more precise definition for the purpose of implementing measures.

It followed that learning opportunities for children with special needs should have provided similar opportunities as for regular students, but this objective was not achieved. Statistics from 2002–2005 show that of the children who graduated from special needs schools or classes, 68% moved on to vocational education.[35] There were no specific goals for schools and classes for special needs children in the Basic Schools and Upper Secondary Schools Act. The Act stated that special classes could be formed in state and municipal schools, if necessary and depending on the needs of students, in primary and secondary schools or sanatorium schools.[36]

We can conclude that learning in regular schools created better opportunities for disabled students to further their education and access the labour market. The Basic Schools and Upper Secondary Schools Act of 2003 established counselling committees for special needs education in the education system.[37]

On the road to an inclusive society, several approaches were taken in Estonia: 1) Expert disability diagnosis provided a better understanding of the organization of assistance and learning and creation of initiative based on personal needs; 2) Talented children also benefited from the adaptation of curricula to each child's individual needs; 3) The new approach did not try to make a disabled person "normal" but accepted her/him as one of us; and 4) Increased tolerance reduced the gap between the medical and social model and the social model merged into a rights-based model,[38] focusing on inclusion in society.

It should be noted that the Soviet-era disability-centred, or medical approach, to organising education for children with more severe disabilities was not completely forgotten. Attempts were made to correspond three levels of intellectual development delay to corresponding curricula – simplified (mild delay), coping (moderate delay), and curriculum of care (severe delay). The diagnosis determined the curriculum, and either a special school

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[35] 'Erivajadustega laste õppimisvõimalused' [Study opportunities for children with special needs], in *Riigikontroll. Kontrolliaruanne nr OSIII-2-6/06/93, 10.11.2006* [National Audit Office. Control Report No. OSIII-2-6 /06/93, 10.11.2006], Tallinn, 2006, p. 28. Available: https://www.digar.ee/arhiiv/et/raamatud/11866 (accessed 24 June 2016).

[36] 'Basic Schools and Upper Secondary Schools Act, Paragraph 93 (3),' *Riigi Teataja* [State Gazette], 2003. Available: https://www.riigiteataja.ee/en/eli/ee/Riigikogu/act/521062016007/consolide (accessed 28 October 2018).

[37] Ibid.

[38] U. Miller, S. Ziegler, 'Handicap International Christoffel-Blindenmission,' in *Manual Making PRSP Inclusive*, 2006. Available: http://documents.worldbank.org/curated/en/591511520425305241/pdf/123975-WP-ENGLISH-Making-PRSP-inclusive-PUBLIC.pdf (accessed 21 June 2018).

or a special class in a regular school was suggested. By law, every child had the right to attend school near home, but until 2004, this was only a theoretical opportunity. The legislation did not specify precisely what schools need to change in their learning environments to meet the specific needs of children, so the situation remained uncertain.[39]

Conclusion

By the time Estonia joined the European Union in 2004, the state had created legislation in many fields, adopted main international agreements, and attempted to democratise society. The process of democratisation of education was progressive, especially as regards students with special needs. Implementation of inclusive education needed simultaneous abandonment of the former medical or disability-oriented approach and acceptance of completely new ideas, terminology, and attitudes to give all children equal footing in an all-inclusive education.

In Estonia, a historically literate state, significant pressure on the performance of education has always existed, and the categorisation/classification of learners was a form of an individualised approach rather than a deliberate desire to segregate and marginalise. During the transitional period from 1991 to 2004, most Soviet classifiers based on mental activity survived as the basis for the differentiation of learners in corresponding educational institutions and curricula.

Compared to other European countries, the proportion of students with special educational needs was rather high, 15% of all students in 2006.[40] Nonetheless, the rights-based approach to education in Estonia was based on all human rights principles. Laws guaranteed equal treatment of all children, obligation and availability of education, and the right and opportunity for continuing education and employment. Differentiation at different levels was carried out using pedagogical methods, not medical ones, and movement between various curricula and forms of study was enabled. Diagnosis-based labelling of learners has been completely abandoned in daily conversation. Practical expression of inclusive education abandoned labelling in the educational field.

Teaching in an inclusive context was set in 2004 as a national task in Estonia: how to teach a broadly diverse student body, one that has special needs, various talents, language barriers, and other issues, to achieve good results.

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[39] E. Tiitus, 'Erivajadusega õpilane tavakoolis ja suhtumine erivajadusega laste tavakooli kaasamisse' [Special needs students in regular schools and attitudes toward inclusion of special needs children into regular schools], Thesis, Tallinn Pedagogical University, 2000, p. 16.

[40] H. Kanep, *Analüüs haridusliku erivajadusega õpilastest ja tugiteenuste kättesaadavusest õpilastele. Lõpparuanne* [Analysis of pupils with special educational needs and availability of support services for students. Final report], Haridus- ja Teadusministeerium, 2008, p. 5. Available: http://dspace.ut.ee/bitstream/handle/10062/40911/Uld_HEV.pdf (accessed 25 May 2018).

History of Education as a Changing Research Field

Iveta Kestere, Irena Stonkuviene and Veronika Varik

Abstract. This study focuses on the 1990s, when the well-organised community of Baltic educational historians faced the challenges of a changing political system. Researchers who had previously worked under strict authoritarian rule had to accomplish three tasks: 1) create a new narrative of the history of education of the Baltic states, emancipated from Soviet ideology, and explain sources available in the newly-opened archives; 2) learn to "sell" (at conferences and through publications) their stories to a foreign audience of historians; and 3) become involved in the global community of educational historians. Our sources are monographs on the history of education and 41 doctoral theses developed in the Baltic states. These sources were confronted by academic studies from internationally recognised scholars in various regions, characterizing global trends in the current history of education. We developed a model of requirements and analysed how the supply from the Baltic states complied with global trends in the history of education. We conclude that the national history of education was rewritten by getting rid of the simplified Soviet "class struggle" stories, and also fulfilled the demands of the local community, that is, confirming the importance of education for uplifting a nation and proving the long standing connection between the Baltics and Europe. The development of education in the Baltic countries was primarily explained in a frame of European political history and not the history of education. Communication with the global community of historians of education formed slowly: on the one hand, information about their activities was lacking and finances and foreign language knowledge was insufficient, but on the other hand, nationally-oriented stories about history filled with local facts were just politely regarded by an international audience. From the perspective of the global history of education, studies in the Baltic states about education of specific social groups (e.g., ethnicity and disability) were more up-to-date.

Keywords: history of education, national narratives, doctoral theses, Baltic states

Introduction

At the end of the 1980s with the advent of political freedom for the Baltic states, historians, including historians of education, become a popular community of busy scholars who were required to fulfil several tasks. Baltic historians met the public demand for creating a "new" history for the renewed nation-states, a history useful for restoration and uplifting of national self-confidence. Also, historians themselves were willing to restore their professional reputations that had suffered greatly during the Soviet era when history fulfilled political propaganda functions, most notably the legitimisation of incorporation of the Baltic nations into the Soviet Union and in defence of the advantages of Soviet life (as compared to the period of Baltic independence during the 1920s–1930s). In

this context, the first contacts with Western colleagues, previously inaccessible behind the Iron Curtain, also began to develop.

The purpose of our article is to analyse the activities of educational historians in the Baltic States in three directions, namely, the creation a new narrative for national history, explanation of these narratives to the world, and integration into the global community of historians of education.

Our sources are monographs and collections of articles in the history of education, as well as doctoral thesis developed in the Baltic countries from 1990 to 2004. There were 41 theses, 10 of them developed in Estonia, 8 in Latvia, and 23 in Lithuania (see Table 1).

Creation of a "new" national history of education

The popularity of national history during periods of social transformation has been apparent since the rise of national movements in mid-19th century. Writing national history accompanied the creation of the nation state: "Nation building and history writing go hand in hand."[1] History became a significant building block to construct (and re-construct) national identity in the former Soviet republics,[2] which had suffered greatly under Russian domination. In the 1990s, a "new" history, both in terms of facts and public significance, emerged in the Baltic states.[3]

Ability to liberate from the dictatorship and restore independent states in the Baltic's was explained with preserving of national traditions, values and collective memories throughout the years of Soviet occupation. A significant and positive role was given to the national identity safeguarded through "unofficial education" (for example, in families).[4] After regaining independence, a new history gave a clear message to the public: a sense of togetherness helped defeat dictatorship and regain freedom. Researching and learning national history gained popularity and became the answer to totalitarianism[5] where "international" was synonymous with "socialistic camp", historians had limited access to sources, publications were censored, and the central narrative was about the history of education in Russia.

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[1] D. Tröhler, 'Tracking the Educationalization of the World: Prospects for an Emancipated History of Education,' *Pedagogika*, vol. 67, no. 3, 2017, p. 213.

[2] See M. Tamm, 'Writing Histories, Making Nations: A Review Essay,' *Storicamente*, no. 12, 2016, p. 2.

[3] See Estonian case in M. Carretero, *Construction Patriotism. Teaching History and Memories in Global Worlds*, Charlotte, North Carolina, IAP, 2011, pp. 38-47.

[4] A. Abens, 'Effects of Authoritarianism on the Teaching of National History: the Case of Latvia,' *Paedagogica Historica,* vol. 51, no. 1-2, 2015, pp. 166-180; G. Abols, *Contribution of History to Latvian Identity*, Riga, Nacionālais apgads, 2003; M. Carretero, *Constructing Patriotism. Teaching History and Memories in Global Worlds*, Charlotte/North Carolina, Information Age Publishing, Inc., 2011, p. 41.

[5] See A. Nobik, I. Kestere, J. Gulzynska, 'History of Education Journals and the Development of Historical Research on Education in Eastern Europe (1990–2016),' *International Journal for the Historiography of Education*, no. 2, 2019, pp. 141-155.

By the end of the 1980s, historians eagerly went through archives that were previously secret but were now partially and/or completely open and available. First and foremost, historians of education focused on the study of education history during the period of Baltic independence from 1918 to 1940. We can find several explanations why this period seemed so attractive.

First, the 20 years of Baltic independence were harshly attacked by Soviet ideology: the period was labelled as "bourgeois" and all events in education were reduced to explanations of how workers and peasants fought with capitalists to be allowed to pursue education. Every remark about Baltic independence was carefully censored and, inevitably for historians, this meant applying ideology and creating a fraudulent story. Yet, in public memory, independence remained the "Golden Age" when the Baltic states prospered and flourished both in terms of economy and also in culture and education. Myths about state independence were secretly passed down from one generation to the next. Therefore, it is logical that historians desired to clarify what really happened in Baltic education during the 1920s–1930s.

Second, very little research was done on sources from 1918–1940 (documents, books, and mass media) as permission for special access was required during the Soviet era. Although it wasn't difficult for professional historians to receive authorisation, it still meant uncomfortable contact with Soviet bureaucracy.

Third, 1918–1940 sources were usually available in the national languages; therefore, it was easier and faster to analyse them.

For these reasons, the interwar period became the first topic historians restored from oblivion and presented in the public space. Until 2004, several monographs of educational historians were published in Latvia,[6] Estonia,[7] and

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[6] L. Žukovs, A. Kopeloviča, *Skolotāju izglītība un pedagoģiskā doma Latvijā* [Education of teachers and pedagogical thought in Latvia], Rīga, RaKa, 1997; A. Staris, V. Ūsiņš, L. Žukovs, *Skolas un izglītība Latvijā. 1900–1920* [Schools and education in Latvia. 1900–1920], Rīga, RaKa, 2000; A. Stairs, V. Ūsiņš, *Izglītības un pedagoģijas zinātnes attīstība Latvijas pirmās brīvvalsts laikā* [Development of education and pedagogy science during the first independence period of Latvia], Rīga, Zinātne, 2000; A. Staris, *Skolas un izglītība Rīgā no sendienām līdz 1944* [Schools and education in Riga from olden days to 1944], Lielvārde, Lielvārds, 2000; J. Anspaks, *Pedagoģijas idejas Latvijā* [Pedagogical ideas in Latvia], Rīga, RaKa, 2003.

[7] L. Andresen, *Eesti rahvakooli ja pedagoogika ajalugu, I: Eellugu ja algus kuni Põhjasõjani* [History of Estonian folk school and pedagogy. Vol. 1: From prehistory to the Northern War], Tallinn, Avita, 1997; T. Karjahärm, V. Sirk, *Eesti haritlaskonna kujunemine ja ideed 1850–1917* [Formation and ideas of Estonian intelligence 1850–1917], Tallinn, Eesti Entsüklopeediakirjastus, 1997; L. Andresen, *Eesti rahvakooli ja pedagoogika ajalugu, II: Kaheksateistkümnes sajand* [History of Estonian folk school and pedagogy. Vol. 2: 18th Century], Tallinn, Avita, 1999; A. Liim (ed.), *Haridusinstitutsioonid Eestis keskajast kuni 1917. aastani* [Educational institutions in Estonia from the middle ages until 1917], Tartu, Eesti Rahvusarhiiv, 1999; L. Andresen, *Eesti rahvakooli ja pedagoogika ajalugu, III: Koolireformid ja venestamine (1803–1918)* [History of Estonian folk school and pedagogy. Vol. 3: School reforms and russification (1803–1918)], Tallinn, Avita, 2002; V. Paatsi, *Eesti talurahva loodusteadusliku maailmapildi kujunemine rahvakooli kaudu (1803–1918)* [Formation of the natural science outlook of Estonian peasants through country schools (1803–1918)], Tallinn, Tallinna Pedagoogikaülikooli kirjastus, 2003.

Lithuania,[8] focusing on national education from its origins up to 1940. These are studies about education management; the history of various education establishments (mostly elementary and secondary education); curricula; descriptions of student bodies; teacher training, teaching staff and their social conditions; and the history of pedagogical ideas.

Yet another topic prohibited by the Soviets but now restored was the exile Baltic community in West.[9] During World War II, millions of Europeans became exiles,[10] and amongst them were hundreds of thousands of inhabitants of the Baltic states who feared the repressive measures of Stalin and did not want to live in the USSR.[11] Baltic refugees created a wide network of education institutions from kindergartens to a university in their new homelands. But information about the Baltic community in exile was hidden by the Soviet Union or delivered in a very distorted and negative way. Hence, education in Western exile became a fresh area of study for "new" national histories.

We must also mention the first reflections about education during the Soviet occupation.[12] The Soviet story can be added to studies of recent history that is inevitably tainted with subjectivity and politics. However, when writing about the Soviet history of education, people raised in the USSR had some advantages: they had knowledge or knew the decryption codes that helped

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[8] R. Motuzas, *Lietuvos vidurinės mokyklos raidos 1918–1940 metais pedagoginės kryptys* [The pedagogical trends in the development of Lithuanian secondary school in 1918–1940], Vilnius, Leidybos centras, 1995; O. Tijūnėlienė, *Pedagoginiai santykiai Lietuvoje (1900–1940)* [Pedagogical relations in Lithuania (1900–1940)], Klaipėda, Klaipėdos universiteto leidykla, 1996; S. Valatkienė, *"Naujojo ugdymo" sąjūdis Vakaruose, jo idėjų atspindys Lietuvoje (1918–1940)* [The movement of "New Education" in the West, reflection of its ideas in Lithuania (1918–1940)], Vilnius, VU leidykla, 1997; S. Kaubrys, *Lietuvos mokykla 1918–1939 m.: galios gimtis* [The Lithuania school in 1918–1939: birth of power],Vilnius, Vieš. įstaiga "Statistikos tyrimai," 2000; O. Tijūnėlienė, *Mokytojo autoriteto samprata Lietuvoje (1918–1940)* [The concept of teacher's authority in Lithuania (1918–1940)], Klaipėda, Klaipėdos universiteto leidykla, 2000.

[9] S. Montvilaitė, 'Lietuvių mokyklos perkeltųjų asmenų stovyklose Vokietijoje 1945–1950 metais' [Lithuanian Schools in the Camps for "Displaced Persons" in Germany in 1945–1950], *Acta Paedagogica Vilnensia,* no. 4, 1997, pp. 44-51; K. Pečkus, *JAV lituanistinio **švietimo** ir lietuvių egzodo pedagogikos istorijos bruožai* [The features of history of Lithuanian education and Lithuanian exodus pedagogy in the USA], Vilnius, Lietuvos Respublikos švietimo ir mokslo m-jos Leidybos centras, 1997; A. Staris (red.), *Rietumu trimdas latviešu pedagoģiskā doma (1944–1990). Antoloģija* [Latvian pedagogical thought in the Western exile (1944–1990). Anthology], Rīga, RaKa, 2004; V. Rajangu, M. Meriste, *Eesti koolid ja eesti keele õpe välismaal* [Estonian schools and the Estonian language tuition abroad], Tallinn, Tallinna Tehnikaülikool, 1995.

[10] I. Zake, *Politics of a Refugee Community. American Latvians*, New Brunswick (USA) and London (UK), Transaction Publishers, 2010, p. 29.

[11] L. Zalkans, *Back to the Motherland. Repatriation and Latvian Émigrés 1955–1958*, PhD diss., University of Stockholm, 2014, p. 50.

[12] A. Staris (red.), *Pedagoģiskā doma Latvijā no 1940.gada līdz mūsdienām* [Pedagogic thought in Latvia from 1940 until today], Rīga, Puse, 1998; J. Ant, *Eesti 1939–1941: rahvast, valitsemisest, saatusest* [Estonia 1939–1941: People, governance, fate], Tallinn, 1999; A. Jürgenson, *Siberi eestlaste territoriaalsus ja identiteet* [The identity and territoriality of Siberian Estonians], Tallinn, Tallinna Pedagoogikaülikooli kirjastus, 2002.

evaluate censorship in sources, propaganda and "rewritten" Soviet style history. Sometimes, the Soviet political and ideological context was so absurd that people (including historians) born and raised in democratic countries simply could not believe it. Yet, when analysing education of the Soviet period, it was difficult for ex-Soviet citizens (including historians) to distance themselves from individual memories and the need to explain "how it all was," forgetting that in order to understand self-experience, one needs a profound theoretical basis, as in all research.[13]

Public enthusiasm about access to new historical sources has promoted expansion of the community of historians, mostly among amateurs. In Estonia, the community-based Estonian Public Teachers Research Institute had been recognised by the local Ministry of Education in 1972 and gathered teachers interested in academic research. The institute had a section on the history of Estonian schools, which, during the 1990s, highlighted the role of past and current teachers in Estonian culture,[14] activities of Estonian educators between 1918 and 1940,[15] and other issues. The collection of the Estonian Public Teachers Research Institute contains much empirical data from various periods of Estonian education and provides material for comparative research.

Amateur historians in Latvia are widely represented in the annual collection of articles *Era and Personality*, first published in 2000[16] when the history of education gained popularity amongst University of Latvia Master's and Doctoral programme students. The initiator of *Era and Personality* was a professional historian, prof. Aida Krūze. As Krūze has often stated, the primary motive for printing the first edition of *Era and Personality* was to publicise facts carefully collected and discovered by students. This collection of articles was published for 15 years and became a significant repository of biographies of famous and local teachers.[17]

The work of professional historians demands much scrutiny and is very time consuming, but during times of rapid social change, the public was not willing to wait for carefully developed studies. After the long years of silence, people wanted to tell their story or that of their families, or even the story of

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[13] See K. Etherington, 'Reflexivity: Using Our 'Selves' in Narrative Research,' in S. Trahar (ed.), *Narrative Research on Learning: Comparative and International Perspectives*, Symposium books, 2009, p. 81.

[14] *Eesti pedagoogika ja kool, XLII*: Õpetajad *kooli-, kultuuri- ja* ühiskonnategelastena [Estonian pedagogy and school, XLII: Teachers as educational, cultural persons and public people], Tallinn, 1990; *Eesti pedagoogika ja kool, XLVI*: Õpetaja *ja kooliajalugu* [Estonian pedagogy and school, XLVI: Teachers and school history], Tallinn, 1992.

[15] *Eesti pedagoogika ja kool, XLIX: Koolinõunikud koole nõustamas* [Estonian pedagogy and school, XLIX: School counsellors in advising schools], Tallinn, 1998.

[16] A. Krūze (ed.), *Laikmets un personība* [Era and personality], Rīga, Raka, 2000.

[17] A. Nobik, I. Kestere, J. Gulzynska, 'History of Education Journals and the Development of Historical Research on Education in Eastern Europe (1990–2016),' *IJHE. Bildungsgeschichte. International Journal for the Historiography of Education*, no. 2, 2019, pp. 141-155.

the entire nation. Alan Wider has described this "necessity to tell" through studying the post-apartheid society in South Africa.[18]

There was a general lack of professionals in history, and, therefore, Baltic historians of education gladly accepted also those who were learning by doing. Historians of education are sometimes so delighted about the attention to their often-marginalised field that they create the illusion that the history of education is not a serious field of study: a researcher needs only enthusiasm, good will, and plenty of time for research in archives but does not require special skills in methodology. Local education history sometimes became a form of socializing – less research, more partying. Unfortunately, this leads to degradation of the field to the hobby level and the belief that anyone with time and the desire can study history. In other words, competition is lacking in the small communities of historians of education, and amateurs are enthusiastically accepted.

In general, after regaining independence, the first studies of the history of education fulfilled their tasks with integrity: they discovered new sources and provided insight into the development of education, interpreting facts mainly in the context of European political history. Education history was freed from the simplified Soviet "class approach," and previously prohibited or distorted national stories were revealed to the public. Yet, these first studies lacked references to global historiography, prohibited behind the Iron Curtain for 50 years and still difficult to reach in the 1990s.

A new generation of researchers emerged during 1990s. They had been trained by Soviet-educated historians and education scholars; thus, the "new" national history was discovered together by learning from each other, but still without the application of modern global approaches and theories. Access to Western histories of education was limited due to insufficient funding (conferences and books published in the West were too expensive) and lack of foreign language skills.

Of 41 thesis developed in the Baltic States from 1990 to 2004, 37 (90.2%) were devoted to the history of education in Estonia, Latvia, or Lithuania; 22 (53.6%) authors included the history of education during the first period of independence in their research, and 10 (24.3%) specifically researched the period from 1918 to 1940. Five (12.1%) doctoral theses focused on education under Soviet dictatorship, and 4 (9.7%) were devoted to the history of education in the West. This expansion of geographic borders was important for the new narrative as during the Soviet era, Russia was posited as the centre of the history of education and cradle of all progressive educational ideas.

The history of various educational institutions was one of most popular topics for doctoral theses, ranging from kindergartens to universities and teacher training institutions. Preparation of theses in the form of overviews was quite understandable during this period: researchers were driven by the task to reveal the "new" history of education of the Baltic States in as short a period

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[18] A. Wieder, 'Testimony as Oral History: Lessons from South Africa,' *Educational Research*, vol. 33, no. 6, 2004, pp. 23-28.

of time as possible and as extensively as possible, thus creating a framework for further studies that would be more focused on specific phenomenon in education. Descriptive theses were usually written in Latvia and Lithuania, but Estonia focused on specific problems of education right from the beginning.

The majority of doctoral theses were completed to receive a degree in education (pedagogy), not history. Thus, it was common to speculate that one could simply adopt past experience and apply it to the present, which threatened to degrade the history of education to a utilitarian or ideological level.[19]

Entering the global community of historians of education

Life in the "comfort zone" of national history could not last long as borders opened and the public of the Baltic states were able to compare the performance of domestic and foreign scholars. Also, the new generation of historians of education desired to improve their professional knowledge and skills as much as possible.

Following Soviet dictatorship, the conceptual development direction for education history was evident – of course, towards the West! Silova describes the situation in post-Socialism lands: ignoring or even denying Western ways was impolite and spoke to backwardness, and changes in the direction of the West were perceived as guarantors of progress, triumph, and a return to "normality."[20] The West in the history of education became a powerful argument.[21]

But first, one needed to "find" the West, which was not easy in the 1990s when the Internet was still developing and personal computers were a luxury. Current information in a field as specific as the history of education could be found only in some scarce magazines in libraries and through discussion with the first foreign colleagues to visit the Baltics.

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[19] Marc Depaepe in several works writes about utilitarianism in the history of education, e.g., M. Depaepe, 'Some Statements about the Nature of the History of Education,' in K. Salimova, E. V. Johanningmeier (eds.), *Why should We Teach History of Education*, Moscow, The Library of International Academy of Self-Improvement, 1993, pp. 31-36; M. Depaepe 'Nenozīmības īpatnības. Pedagoģijas vēsture skolotāju izglītībā' [Qualities of irrelevance. History of education in the training of teachers], in *ATEE Spring University. Teacher of the 21st Century: Quality Education for Quality Teaching,* Riga, University of Latvia, 2008, pp. 14-24; M. Depaepe, 'Why Even Today Educational Historiography is not an Unnecessary Luxury. Focusing on Four Themes from Forty-four Years of Research,' *Espacio, Tiempo y Educación*, vol. 7, no. 1, p. 240.

[20] I. Silova, 'Rediscovering Post-Socialism in Comparative Education,' in I. Silova (ed.), *Post-Socialism in not Dead: (Re)Reading the Global in Comparative Education*, Emerald Group Publishing, 2010, p. 5; J. McNutt, 'What is Modernization? Eurocentrism and Periodization,' *Encounters/Encouentros/Recontres on Education*, no. 15, 2014, pp. 12-136.

[21] See B. Zymek, 'Das Ausland als Argument in der pädagogischen Reformdiskussion. Schulpolitische Selbstrechtfertigung, Auslandspropaganda und Ansätze zu einer Vergleichenden Erziehungswissenschaft in der internationalen Berichterstattung deutscher pädagogischer Zeitschriften, 1871–1952,' *Schriftenreihe zur Geschichte und Politischen Bildung,* vol. 19, 1975.

But while reaching the idealised West, historians of the "post-ness" space who desired to be part of "old" Europe encountered several problems.[22] One of the most significant was that the regained national self-confidence of "new" Europeans and their enthusiastically presented "new" narratives of history were greeted with reserve and even suspicion in the West, for several political and professional reasons. As previously noted, master narratives of national history can be driven by utilitarian or ideological aims – strengthening of national identity and patriotism.[23] Excessive feelings of belonging and solidarity with a specific group was perceived by the democratic public as a potentially manipulative of the individual and related to gaining political power. International, transnational, and global history was trending, but nationality was associated only with negative historical experience in Europe. Although it was Marx's idea to liquidate states, this had gained true popularity under capitalism: "non-state" and "non-territorial" concepts flourished in Europe.[24] National perspective could also always be branded with narrow-mindedness in contrast to an international perspective or broad-mindedness.

In a nutshell, Europeans from the "post-ness" space soon understood that their joy in regaining national identity and positively traced national history narratives were welcomed and recognised only locally, at home. To fit into the common European scene, they needed to convert the national past into concepts of global history and explain it within the context of the global history of education. It required knowledge of foreign languages and time spent reading, a task that turned out to be much more difficult than gathering facts in archives.

While lack of funding and insufficient knowledge of foreign languages delayed Baltic historians' entry into the free world, researchers from the West were eager to study "new" European territories. They were greeted in the Baltics with the utmost respect and interest: they unveiled research achievements from the democratic world and served as guides on the path to the West. First, history of education books published in Western countries[25] were delivered to Latvia by Goethe University Frankfurt professor Gunther Böhme. In 2002 for the first time, Baltic historians of education attended the main event for

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[22] See I. Kestere, 'History of Education and the Struggle for Intellectual Liberation in Post-Soviet Baltic Space after the Fall of the Berlin Wall,' *Paedagogica Historica*, vol. 50, no. 6, 2014, pp. 744-851; I. Ķestere, 'The "Nation" in the History of Education from an European "Postness" Perspective,' *Bildungsgeschichte. International Journal for the Historiography of Education*, vol. 6, no. 1, 2016, pp. 109-111.

[23] F. van Alphen, M. Carretero, 'The Construction of the Relation Between National Past and Present in the Appropriation of Historical Master Narratives,' *Integrative Psychological and Behavioural Science*, vol. 49, no. 3, 2015, pp. 512-530.

[24] G. Schöpflin, *Politics, Illusions, Fallacies*, Tallinn, TLU Press, 2012, p. 155.

[25] G. Böhme, H-E. Tenorth, *Einführung in die Historische Pädagogik,* Wissenschaftliche Buchgesell-schaft, 1990.

the international community of the historians of education – the International Standing Conference for the History of Education (ISCHE).[26]

International cooperation was important for several reasons: 1) It allowed comparison of knowledge and scientific skills with people who had long-possessed the necessary resources, ones that were not available in the USSR: systemic and versatile education, language skills, travelling and publishing opportunities, and approbation of research in an intellectually open professional network;[27] 2) Historians could study global historical narratives and explain local history from this perspective, learning to describe their history to an international audience that usually had little, if any knowledge about the Baltic states, not to mention nuances of educational history; and 3) They could acquire new ideas and methodology for research of local history.

But going West also caused conflict among local communities of education historians, dividing national history enthusiasts into camps supporting traditional forms or implementation of the latest Western trends. The former continued to gather and describe facts from national archives, interpreting them mainly within the context of political history. The latter got carried away with application of various social science theories in historical studies, sometimes allowing the theoretical framework to overshadow logical reconstruction of the history narrative.

Baltic States from the perspective of the global history of education

During the 1990s, an inevitable question was raised – what exactly does the development of the history of education in a Western direction mean? To reveal modern patterns in the global field of education history, we analysed several academic articles written by outstanding and internationally recognised scholars from various regions.[28] They were also selected because of their special focus on the problems of education history as an academic research discipline.

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[26] See more about activities of the historians of education of the Baltic States in I. Ķestere, 'The Baltic Historians of Pedagogy and the International Standing Conference for the History of Education,' *Acta Baltica Historiae et Philosophiae Scientiarum*, vol. 2, no. 2, 2014, pp. 127-132.

[27] M. Depaepe mentions advantages of Westerners in research connecting them with Darwinism evolutionary theory ("the fittest survives"): See M. Depaepe, 'It's a Long Way to... an International Social History of Education: in Search of Brian Simon's Legacy in Today's Educational Historiography,' *History of Education*, vol. 33, no. 5, 2004, p. 540.

[28] D. Tröhler, 'Tracking the Educationalization of the World: Prospects for an Emancipated History of Education,' *Pedagogika,* vol. 67, no. 3, 2017, pp. 211-226; G. McCulloch, 'New Directions in the History of Education,' *Journal of International and Comparative Education,* vol. 5, no. 1, 2016, pp. 47-56; R. Hofstetter, A. Fontaine, S. Huitric, E. Picard, 'Mapping the Discipline History of Education,' *Paedagogica Historica*, vol. 50, no. 4, 2014, pp. 871-880; R. Sani, 'History of Education in Modern and Contemporary Europe: New Sources and Lines of Research,' *History of Education Quarterly,* vol. 53, no. 2, 2013, pp. 184-195; B. Finkelstein, 'Teaching Outside the Lines: Education. History for a World in Motion,' *History of Education Quarterly,* vol. 53, no. 2, 2013, pp. 126-138; R. Aldrich, *Lessons from History of Education. The selected works of Richard Aldrich*, London and New York, Routledge, 2006.

Experts agreed on several points regarding objectives of modern history of education: they called for emancipation of national restraint and discovery of internationally significant topics such as "lost voices" of individuals, "travelling ideas", reality of schooling, education of specific social groups (middle class, gender, ethnicity, and disability), and education outside traditional educational institutions (private organisations, associations, and representatives of civil society).

On this basis, we developed a table of topics of doctoral theses defended in the Baltic countries (see Table 1), which reveals the "fresh" or "modern" topics related to the history of education and those that provide a general overview of educational development in the Baltic states. Statistically, our results are as follow:

1) History of ideas. Travelling ideas – 24.4%;
2) Realities of schooling – 24.4%;
3) Lost voices. Specific social groups – 19.5%;
4) Education outside traditional educational institutions – 7.4%; and
5) General topics. Overview of the development of education in the Baltic States – 24.3%.

As we can see, the majority of research was devoted towards the history of ideas, realities of schooling, and historical overviews of Baltic education. As previously mentioned, ridding history of Soviet ideology was important, which brought new trends in research of local education history such as analysis of the formation of the child's world view at school, opinions about pedagogical relations, and pedagogical ideas expressed by people who were not teachers. Expansion of the teaching profession included not only teachers working in traditional educational establishments but also writers, philosophers, composers, and public figures contributed to the widening of the educational field outside the walls of the school called for by global historians of education such as Lawrence Cremin[29] and Roberto Sani.[30]

Theses on the realities of schools can be divided into two groups: 1) subject specific teaching/learning methods (e.g., mother tongue, mathematics, physical education, music) and 2) the upbringing process at school (e.g., work, aesthetic, national). Didactics and upbringing were key areas in Soviet educational sciences that were thoroughly studied during the Soviet era, developing detailed research methodology. Only research on the history of national upbringing can be considered new in this area, paradoxically acceptable to neither Soviet pedagogy, which perceived everything national with suspicion as a reminder of Baltic national independence, nor to the West where 'national' was identified with radical right-wing political views and Europe's sad historical experience in the 1930s–40s. But national upbringing in the Baltic community was understood as citizenship education within newly independent and democratic states.

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[29] L. A. Cremin, *Traditions of American Education*, New York, Basic Books, 1977, pp. 127-128.

[30] R. Sani, 'History of Education in Modern and Contemporary Europe: New Sources and Lines of Research,' *History of Education Quaterly*, vol. 53, no. 2, 2013, p. 184.

Comparatively, a significant number of theses were devoted to the history of education of specific social groups, a completely new topic in the Baltics. Soviets proclaimed a perfect, homogenous society in which gender and national differences were levelled out to the maximum but where people with special needs did not really fit. Therefore, only a few social groups participated in creating Soviet history with a clear message: oppressed (peasants, workers) *versus* oppressors (capitalists), sometimes joined by victimised women who were denied education by capitalists or other oppressors but rescued by Soviet power. Studies about education of minorities (e.g., Russian and Jewish), the exile community, and people with special needs were also modern from the global perspective: Richard Aldrich invited historians in 2006 "to rescue from oblivion those whose voices have not yet been heard and whose stories have not yet been told."[31] Also, today we hear invitations to search for "top-down" narratives and "potentially lost voices."[32]

In general, we can say that education researchers from the Baltic states entered the world in the 1990s with an extensive array of topics that may have not stood out with originality, but they revealed "virgin" territory – new sources and discussion of education of various social groups under totalitarian/ authoritarian rule.

Conclusion

During the 1990s and the early 21st century, Baltic historians of education honestly tried to solve the professional tasks brought forth by the societies of the new nation states and increase their prestige inside the academic community. Local histories of education were rewritten, eliminating the simplified Soviet "class war" standards and interpreting newly available archives. Yet, we should admit that the new national story was coloured in ideology and directed towards local public demand – expose the communist dictatorship, legitimise national statehood, acknowledge the significance of education in the development of the nation, and prove the long-standing ties of the Baltic states with Western Europe, not just Russia, as proclaimed during the Soviet era. Creation and strengthening of nationalism, patriotism, and optimism with the help of past images is typical of periods of transition, transformation, and confusion.[33] Development of education in the Baltic states was mostly explained in the context of European political history and not the history of education. For

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[31] R. Aldrich, *Lessons from History of Education. The selected works of Richard Aldrich*, London and New York, Routledge, 2006, p. 18.

[32] G. McCulloch, 'New Directions in the History of Education,' *Journal of International and Comparative Education*, vol. 5, no. 1, 2016, p. 51; B. Finkelstein, 'Teaching Outside the Lines: Education History for a World in Motion,' *History of Education Quarterly*, vol. 53, no. 2, 2013, p. 128.

[33] M. Tamm, 'Displaced History? A New "Regime of Historicity" among the Baltic Historians in Exile (1940s–1960s),' *Storia della Storiografia/Histoire de l'Historiographie/History of Historiography/ Geschichte der Geschichtsschreibung. Rivista internazionale. Revue internationale International Review. Internationale Zeitschrift*, vol. 69, no. 1, 2016, p. 136.

the most part, the "new" history of education was written for the local, national "market."

At the same time, public pressure required them to catch up Europe,[34] but this required the capacity to accumulate the knowledge offered.[35] Communication with the global community of historians formed slowly as information about the community's activities, funding, and knowledge of foreign languages was also insufficient. Time was needed to learn how to tell the narrative of Baltic history of education to an international audience without an overload of locally significant facts that were not understandable or interesting to the global community. One had to look for large narratives, problems, and phenomenon in which to attribute the newly discovered local facts. Most successful work in this direction was about education of various social groups ("lost voices"), such as ethnic minorities and education of the Baltic exile community.

When contemplating the future of the history of education of the Baltic countries, one can refer to Barbara Finkenstein who states that attention should be focused not only to the common but also the different by asking – how to understand that?[36] Historians of education of the Baltic countries believe that the local is not understandable just through a global perspective, but global history can also be understandable through a national perspective.[37]

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[34] I. Silova, 'Rediscovering Post-Socialism in Comparative Education' in I. Silova (ed.), *Post-Socialism in not Dead: (Re)Reading the Global in Comparative Education*, Emerald Group Publishing, 2010, p. 13.

[35] J. McNutt, 'What is Modernization? Eurocentrism and Periodization,' *Encounters/Encouentros/Recontres on Education*, no. 15, 2014, p. 134.

[36] B. Finkelstein, 'Teaching Outside the Lines: Education History for a World in Motion,' *History of Education Quarterly*, vol. 53, no. 2, 2013, p. 127.

[37] See also M. Tamm, 'Writing Histories, Making Nations: A Review Essay,' *Storicamente*, no. 12, 2016; I. Kestere, 'The "Nation" in the History of Education from an European "Postness" Perspective,' *Bildungsgeschichte. International Journal for the Historiography of Education*, vol. 6, no. 1, 2016, pp. 109-111.

Table 1. **Doctoral Theses in History of Education defended in the Baltic States from 1990 to 2004**

Estonia	Latvia	Lithuania
Lost voices. Specific Social Groups (Total 8)		
1) Aldo Kals. *The Role of Education in the History of Integration of the Visually Impaired in Estonia.* University of Tartu, 1999 2) Lauri Lindström. *Album Academicum Universitatis Tartuensis 1918–1944:* Tallinn Pedagogical University, 2001 3) Aivar Jürgenson. *Identity and Territoriality of Siberian Estonians.* Tallinn Pedagogical University, 2002 4) Vello Paatsi. *Formation of the Natural Science Outlook of Estonian Peasants Rural Schools (1803–1918).* Tallinn Pedagogical University, 2003 5) Inna Järva. *Educational Changes in Three Generations of Russian Families Living in Estonia: a socio-cultural approac*h. Tallinn Pedagogical University, 2004		1) Valentinas Vytautas Toločka. *Development of Education for the Blind in Lithuania until 1940.* Vilnius University, 1992. 2) Sada Petružienė.*Education of Jewish Children in Lithuania: Development of Gymnasiums and Modern Secondary School.* Klaipeda University, Vytautas Magnus University, 2000. 3) Benediktas Šetkus.*The School of National Minorities in Lithuania during the Period of 1918–1940.* Vilnius Pedagogical University, 2000.
Ideas. Travelling Ideas and Practices (Total 10)		
1) Tiina Kala. *Late Medieval Literary Culture and School Manuscripts: handbook of Dominican Friar David Sliper from Tallinn Friary.* University of Tartu, 2001	1) Jeļena Davidova. *Pedagogic Ideas of J. S. Bach.* University of Latvia, 1997 2) Baiba Kaļķe. *Teachers–Writers in the Development of Pedagogical Theory and Practice in Latvia from 1900–1940.* University of Latvia, 2002	1) Ona Tijūnienė. *The Problem of Pedagogical Relations in Pedagogical Thought in Lithuania in the First Half of the 20th Century.* Vilnius University, 1990. 2) Jolanta Vaičiūnaitė. *The American School as a Social Educational Phenomenon.* Kaunas University of Technology, Vytautas Magnus University, Lithuanian Sports, 1997. 3) Diana Šileikaitė. *The System of Pedagogy of Immanuel Kant.* Vilnius University, Kaunas University of Technology, 2002. 4) Džiuljeta Maskuliūnienė. *Lithuanian Didactic Prose of the 19th Century.* Vilnius University, 1999.

Continue Table 1

Estonia	Latvia	Lithuania
		5) Lilia Rašimienė. *Komensky's Idea of "The Mother's School" in Lithuania – late 19th century – first half of the 20th century).* Klaipėda University, Vytautas Magnus University, 2000. 6) Aušrinė Zulumskytė. *Development of the Child's World View in Lithuanian Primary SchoolS: the aspect of the curriculum in 1918–198.,* Klaipeda University, 2000. 7) Kristina Mačiulytė. *Ideas of Education in Fugative Sermons in the Grand Duchy of Lithuania in the Second Half of the 18th Century.* Institute of Lithuanian Literature and Folklore, 2004.
Reality of Schooling (Total 10)		
1) Karl Kaalep. *Justification of Content and Methodology of Special Schools' Mother Tongue Teaching.* University of Tartu, 1993 2) Martin Hallik. *Role of Professors and Students of the University of Tartu in 'Studia Humaniora Orientalia' (1802–1940).* University of Tartu, 2001 3) Roman Kallas. *Tradition of Teaching Estonian Literature in the 20th Century Russian-Language Schools.* Tallinn Pedagogical University, 2003	1) Valentīna Liepa. *Interaction of Theory and Practice in Teacher Aesthetic Education from 1920 to 1940 in Latvia.* University of Latvia, 1990 2) Ilma Neimane. *Several Pedagogic Conclusions on Content and Teaching/Learning Mathematics During the 1920s and 1930s in Latvia.* University of Latvia, 1993 3) Irena Upeniece. *Development of Theory and Practice for Physical Education in Latvian Schools from the Latter Half of the 19th Century to 1940.* University of Latvia, 1995	1) Danutė Petrauskaitė.*Klaipėda Music School as a Pedagogical System and its Importance to Music Education in Interwar Lithuania.* Vilnius University, 1993 2) Asta Širiakovienė, *Vocational Training in General Education Schools in Lithuania (1940–1990).* Vilnius University, 1993 3) Remigijus Motuzas, *Pedagogical Trends in the Development of Secondary General Education Schools in Lithuania in 1918–1940.* Vilnius University, 1994 4) Vidimantas Raudys. *National Upbringing in Lithuania's Elementary Schools in 1918–1940.* Klaipeda University, 1998
Education outside Traditional Educational Institutions (Total 3)		
1) Anne Valmas. *Publishing Activities of Estonians outside Estonia from 1944–2000.* Tallinn Pedagogical University, 2003		1) Tamara Vainauskienė. *Formation and Development of Vocal Pedagogy in Lithuania (1919–1949).* Lithuanian Academy of Music and Theatre, 1993 2) Vida Pukienė. *The Lithuanian Education Societies in the Early 20th Century (1906–1915).* Vilnius University, 1993

Continue Table 1

Estonia	Latvia	Lithuania
General Topics. Overview of Development of Education in the Baltic States (Total 10)		
	1) Aivars Rubenis. *History of the Development of Compulsory Schools in Latvia and Their Pedagogic Values from 1919 to1940.* University of Latvia, 1990 2) Leonards Žukovs. *Development of Education of "Folk School" Teachers in Latvia until 1940.* University of Latvia, 1993 3) Irēna Saleniece. *Political Management of Schools in Latvia (1918–1934).* University of Daugavpils, 2002	1) Bronė Čėsnaitė.*Organisation of Obligatory Secondary Education in Lithuania in 1975–1987.* Vilnius University, 1992 2) Romaldas Navickas. *Universal Secondary Education in Lithuania in 1966–1988: Aspect of Management.* Vilnius University, 1992 3) Vitalija Gražienė. *Pedagogical Features of Kindergarten in Lithuania before 1940 – roots, development and establishment of systems.* Vilnius University, 1993 4) Darius Staliūnas. *Government, Society and Higher Education in Lithuania in the Middle of 19th – Beginning of 20th Century.* Vytautas Magnus University, 1997 5) Artūras Grickevičius.*Vilnius Papal Seminary in 1583–1655,* Vytautas Magnus University, Institute of Lithuanian History, 1997 6) Aušra Žemgulienė. *Development of training of primary school teacher in Lithuania in 1918–1940.* Vilnius Pedagogical University, 2000 7) Sigita Montvilaitė. *Maturity of Education Science in Lithuania in the First Half of the Twentieth Century.* Vilnius Pedagogical University, 2002
Total 10	**Total 8**	**Total 23**
Total 41		

In Conclusion

Iveta Kestere

This collection of articles is a story about education reforms. However, these are not "ordinary" reforms that visit the field of education chronically and have become almost commonplace.[1] Education reforms in the Baltic states, which began in the late 1980s shortly after Gorbachev's proclamation of *perestroika*, were not improvements in educational practices that were carefully coordinated at the highest levels in the offices of civil servants. It was the destruction of the old world, while simultaneously creating a new education system in a new political and geographical context. Education reforms went hand in hand with political change: liberation from the dictatorship of the Soviet Union and the restoration of the independence of the Baltic states and their return into the Europe. Education reform in the Baltic States was imbued with an aura of political protest and education, in Labree's words, became a showplace for the ideals of society.[2]

Common political and social goals defined change in all axes of education: 1) institutions needed to be freed from Moscow's leadership and concurrently adapted to the requirements of global actors (OECD, the World Bank, EU); 2) in school practice, communist ideological teaching content needed to be changed in response to the local community's demand for nationally-oriented education and to the market economy's need for a competent workforce; and 3) the entire teaching community needed to be inspired because radical reforms required broad agency in educational institutions.

These changes and challenges are the focus the research described in our collection. However, participating authors are not only education researchers, but many of them are also teachers who personally experienced the turbulence in the field of education in the 1990s. Therefore, this collection is a look from the "inside," and between the lines, one can sense each author's personal

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1   See D. F. Labaree, 'School Syndrome: Understanding the USA's Magical Belief that Schooling Can Somehow Improve Society, Promote Access, and Preserve Advantage,' *Journal of Curriculum Studies*, vol. 44, no. 2, 2012, p. 155; E. Terhart, 'Teacher Resistance Against Reform: Reflecting an Inconvenient Truth,' *School Leadership & Management*, vol. 33, no. 5, 2013, p. 496.
2   D. F. Labaree, 'School Syndrome: Understanding the USA's Magical Belief that Schooling Can Somehow Improve Society, Promote Access, and Preserve Advantage,' *Journal of Curriculum Studies*, vol. 44, no. 2, 2012, p. 154.

position, experiences, and insecurities, which accompany every attempt to reform education.[3]

The first chapter of the collection reveals institutional changes "during a strategic move away from the socialist past towards a (Western) European future."[4] The Baltic states needed to simultaneously change their local education system and take the European path that led to a global education community where standardization, evaluation, inspection, and accountability flourished:[5] "European integration has been a powerful driver for educational reforms in many post-socialist countries."[6] And in the Baltic states too, 'international standards' have become "an increasingly common point of reference."[7] As our collection reveals, in practice this meant understanding countless documents that were regularly produced, supplemented, and changed. The words "Europeanisation, democratization, and market-orientated globalization"[8] resonated and were incorporated into documents frequently, but the content – bringing it to life – was to be instilled in the daily practice of the school.

The second and third chapters of this collection reveal the new goals of education – the need to raise a person who could successfully integrate into the new world, which the Baltic states joined after emerging from the Soviet Union. It was the Western world, where democracy was self-evident – it was the norm – but the topical issues in the field of education were about

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3 E. Terhart, 'Teacher Resistance Against Reform: Reflecting an Inconvenient Truth,' *School Leadership & Management*, vol. 33, no. 5, 2013, p. 488.

4 M. Chankseliani, I. Silova, 'Introduction. Reconfiguring Education Purposes, Policies and Practices during Post-socialist Transformations: Setting the Stage,' in M. Chankseliani, I. Silova (eds.), *Comparing Post-socialist Transformations: Purposes, Policies, and Practices in Education*, Symposium Books, 2018, p. 9; See also M. Lauristin, 'Contexts of Transition,' in M. Lauristin, at al. (eds.), *Return to the Western World. Cultural and Political Perspectives on Estonian Post-Communist Transition*, Tartu, Tartu University Press, 1997, p. 25.

5 D. Tröhler, 'Change Management in the Governance of Schooling: The Rise of Experts, Planners, and Statistics in the Early OECD,' *Teachers College Record*, vol. 116, 2014, p. 14; E. Terhart, 'Teacher Resistance Against Reform: Reflecting an Inconvenient Truth,' *School Leadership & Management*, vol. 33, no. 5, 2013, p. 486.

6 M. Chankseliani, I. Silova, 'Introduction. Reconfiguring Education Purposes, Policies and Practices during Post-socialist Transformations: Setting the Stage,' in M. Chankseliani, I. Silova (eds.), *Comparing Post-socialist Transformations: Purposes, Policies, and Practices in Education*, Symposium Books, 2018, p. 15.

7 G. Steiner-Khamsi, 'Understanding Policy Borrowing and Lending,' in G. Steiner-Khamsi, F. Waldow (eds.), *World Yearbook of Education. Policy Borrowing and Lending in Education*, London, New York, 2012, p. 5

8 M. Chankseliani, I. Silova, 'Introduction. Reconfiguring Education Purposes, Policies and Practices during Post-socialist Transformations: Setting the Stage,' in M. Chankseliani, I. Silova (eds.), *Comparing Post-socialist Transformations: Purposes, Policies, and Practices in Education*, Symposium Books, 2018, p. 9.

a knowledge society,[9] creativity, innovation and flexibility, and compliance with "economic challenges of a more and more global economy."[10]

Education of citizens in new, democratic societies required new curricula. Through discussion of a variety of curriculum design issues, this collection reveals several paths of change, ranging from celebration of a teacher's professional freedom to dissatisfaction with the uncertainty about curriculum arrangement and control. Liberation from Moscow was emancipation from dictatorship and foreign ideology, but governments, regimes, and elites will always seek to "centralise the conduction and impose their criteria,"[11] transforming emancipation into a "continuous and unfinished process" that constantly produces its own hierarchies and disagreements.[12]

The fourth chapter of this collection reveals the search for the identity of education sciences (pedagogy) by getting rid of a single, ideologised paradigm of trivialised Marxism in order to regain academic freedom and join the global community of education scholars.

Yet, the key actor in each chapter is the teacher: it was they who were jointly responsible for bringing about innumerable changes in educational practice and taking responsibility for educational outcomes. For teachers who had been educated in the circumstances of a different political context, democracy was a challenge that had to be learned together with the students. Yet, in the 1980s and 1990s, teachers were enthusiastic agents of changes, as evidenced by their active participation in the initiation and discussion of education reforms.

Nevertheless, attitudes towards reform are always tied to "mixed experiences, mixed reactions and mixed attitudes."[13] In addition to those who fought for change, there were teachers who continued down the familiar Soviet-era educational path.[14] However, they can hardly be condemned from today's perspective. During reforms, there are always teachers who try to protect the "core practices", "the best of the past,"[15] thus maintaining stability and continuity in the field of education even during turbulent times.

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[9] C. Garrouste, *100 Years of Educational Reforms in Europe: A Contextual Database,* Luxembourg, Publication Offiece of the European Union, 2010, p. 14.

[10] J. M. Resende, M. M. Viera, 'Introduction,' in J. M. Resende, M. M. Viera (eds.), *The Crises of Schooling? Learning, Knowledge and Competneces in Modern Societies,* Cambridge Scholars Publishing, 2009, p. 3.

[11] M. Southwell, M. Depaepe, 'The Relation Between Education and Emancipation: Something Like Water and Oil? Introducing the Special Issue,' *Paedagogica Historica*, vol. 55, no. 1, 2019, p. 1.

[12] Ibid.

[13] E. Terhart, 'Teacher Resistance Against Reform: Reflecting an Inconvenient Truth,' *School Leadership & Management*, vol. 33, no. 5, 2013, p. 496.

[14] M. Chankseliani, I. Silova, 'Introduction. Reconfiguring Education Purposes, Policies and Practices during Post-socialist Transformations: Setting the Stage,' in M. Chankseliani, I. Silova (eds.), *Comparing Post-socialist Transformations: Purposes, Policies, and Practices in Education*, Symposium Books, 2018, p. 9.

[15] D. Tyack, L. Cuban, *Tinkering Toward Utopia. A Century of Public School Reform*, Cambridge, London, Harvard University Press, 2003, pp. 4, 5, 11.

Today's attitude towards the "conservatives" is revealed by the cautious assessment of the Soviet era in several articles. History is written in the present,[16] and when revolutionary ideas about the complete destruction of the old world have faded, the pre-post-Soviet experience no longer seems entirely condemnable.

The most important line that runs through this collection: the myriad of different challenges in the field of education were addressed through the cooperation, mobilised resources, shared energy, and hope among Baltic educators. This is a rare case in the history of education reforms when the "ground level" was ready for, even demanding, reforms that were initiative-rich and active. At the same time, education reforms were supported and defended by the "upper echelon" who incorporated them into the legal framework.

However, education reforms of the 1990s in the Baltic states were only the beginning: "...the reform gives birth to the necessity for another. It looks as if we will have to accept this as being normal."[17]

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[16] T. S. Popkewitz, 'Styles of Reason: Historicism, Historicizing, and the History of Education,' in T. S. Popkewitz (ed.), *Rethinking the History of Education. Transnational Perspectives on Its Questions, Methods, and Konowledge*, Palgrave Macmillan, 2013, p. 1.

[17] E. Terhart, 'Teacher Resistance Against Reform: Reflecting an Inconvenient Truth,' *School Leadership & Management*, vol. 33, no. 5, 2013, p. 498.

Contributors

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Iveta Kestere, *Mg. hist., Dr. paed.*, is a historian of education, professor at the Faculty of Education, Psychology and Art, University of Latvia. She is the author of numerous internationally published articles and the author or co-editor of nine books, among them *History of Pedagogy and Educational Sciences in the Baltic Countries from 1940 to 1990: an Overview* (Riga, 2013). She serves on the editorial board of the academic journal *Acta Paedagogica Vilnensia* (Lithuania) and at the international advisory board of *Paedagogica Historica*. She is a Link Convenor of 17th Network (Histories of Education) at European Education Research Association (EERA). She is a member of the International Standing Conference for the History of Education (ISCHE). Her current academic projects are related to education of the 'New Soviet Man' (University of Vilnius, Lithuania) and visual propaganda in education under European totalitarianisms (University of Vic, Spain), and her academic interests include also history of educational sciences and history of teaching profession.

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Ene Mägi, *PhD*, from 1992 to 2013 was associate professor of Tallinn University, Estonia and founder and leader of the Department of Special Education. Her research and development activities are educational policy, inclusive education, and school behaviour. She has published 17 articles and supervised 35 master's theses and three doctoral theses. Through research and supervision and

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Mare Oja, *PhD*, has worked as a lecturer in history and history didactics at the School of Humanities, University of Tallinn, since 2004. She was a teacher of history, civics, and philosophy (1983–2007) and advisor on history and social science (1993–2010) in the system of the Estonian Ministry of Education. Her tasks were coordination of the process of curriculum development in social science and development of the *National Examination Test* in history. She is the author and editor of various teaching materials. She was the founder, chair, and member of the board of the History Teachers Association of Estonia (1993–2012), ambassador of EuroClio (2011) and member of the board of the International Society for History Didactics. Her *PhD* topic was *Changes in history teaching from the 1980s to today*.

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Iveta Ozola, *Dr. paed.*, is a German teacher and Board Member and lecturer at the Institute of Lifelong Learning and Culture *Vitae*. She graduated from the Faculty of Philology, German Language and Literature Department, and was awarded a doctoral degree in Educational Sciences (History of Education) in 2014 at the University of Latvia. Her doctoral dissertation was devoted to the genesis of pedagogy as a scientific discipline in Latvia. Her current academic interest is the development of educational sciences and pedagogy in Latvia and Germany.

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Ene-Silvia Sarv, *MA*, *MSc*, is freelance expert in the field of education; former lecturer on philosophy and science of education and school as a learning, knowledge creating institution (Tallinn University) and teacher of physics. She participated in teacher education curriculum development for INNOVE-UNICEF missions in Georgia (2014–2019). She is a member of Estonian Academic Pedagogical Association, the Baltic Association of Historians of Pedagogy, Estonian Forum of Education, and honorary member of European Educational Research *Association (EERA)*, former convenor of Network 01 (Professional Learning and Development: Learning for Individuals, Leaders, and Organisations). Author of 25 e-learning materials and six e-courses (2000–2017), three monographs, and more than 100 published research papers. Areas of research: teacher professional development, school culture, concepts and paradigms of education, history of educational/pedagogical thinking, organisational learning and knowledge creation in education, scenario-building, technologies and practices of co-operative thinking.

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Throughout the book, there is a pervasive historical view of the development of specific areas of education in three sections: pre-independence ideals and activities; shaping the educational field of an independent state from legislation to educational content and educational sciences; re-entering the Western world and integrating into EU educational processes. A different substantive approach shows changes in views and practices at the level of individuality, family, institution, and nation. I would like to emphasize in particular the importance of the book as a source of information on the 15-year upheaval in education. It clearly shows, on the one hand, the objectivity of the scientific approach and, on the other hand, the "grounding" of this objectivity due to the personal participation of the writers and researchers in the processes under consideration.

All the mentioned qualities make the book an important information resource for the widest audience: the description of the historical development, the identified ideals, problems and decisions, and the rich list of sources can be used by students, university lecturers, teachers, and researchers in the Baltic states, as well as internationally.

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