

# THE USE OF CARICATURES IN THE SCHOOL TEXTBOOKS OF WORLD HISTORY (METHODOLOGY OF RESEARCH-BASED STUDYING)

**P. V. Moroz,**

*Ph.D., senior researcher of the Social Education Department at  
the Institute of Pedagogy of the NAES of Ukraine  
e-mail: pmoroz@ukr.net*

In the article, the peculiarities of the usage of caricatures in the school textbook on History are described. The methodology of work with them at the History lessons is provided. The author demonstrated that the important component of the full-fledged, developing studying at the History lessons is including various kinds of visualisation in the educational process. The main source of these visualisation types must be a school textbook on History. On author's opinion, it will make it possible to change it into a workbook, which will stimulate a pupil to work with it independently.

One of the important tasks which must be fulfilled by the textbook author is to teach children to "read" and to understand the caricatures. The cognitive tasks for the caricatures which were selected in a textbook must guarantee the usage of the corresponding methods and ways of the historical and social research in the analysis of the typical plots by pupils, teach them to make questions and be aware of the activity aim, forecast and exercise the self-control and the self-correction, evaluate the quality of the performed work.

**Key words:** *school textbook on History, textbook structure, illustrative material, caricatures.*

**Problem statement.** Under the modern conditions of the information society, the educational technology of the development of creative personality traits began to acquire significant relevance; one of them is the research-based one that directly affects the content and the nature of history teaching, changing requirements for training of graduates, their creative development, skills, and abilities. A modern graduate should not only have a certain amount of fundamental knowledge, but also be able to be independent, to think critically, reasonably defend their point of view, independently analyze the phenomena and processes of social life relations and contradictions, find information about life in the past, analyze, interpret and evaluate it, formulate, express and defend their opinions,

make choices and explain the position to debate on historical issues, to think, communicate and collaborate in training.

Addressing these challenges is essential to the use of a variety of historical sources including visual ones in the history textbooks and the studying process at the lessons of history.

**Analysis of recent research and publications.** Nowadays the gained methodological experience of their use in teaching history is represented in the numerous published articles, textbooks, Ph.D thesis papers on the considered subject. In particular, the problem of the methodology of using caricatures in the structure of the textbook is studied in the publications by O. Zheliba, Yu. Komarova, O. Pometun and others. At the same time, the analysis of the problem of the use of visual sources in the history teaching at the secondary schools in Ukraine demonstrates the lack of effective, focused, systematic work on them as the teachers implement educational, developmental, educational potential of the visual historical sources only partially, and they sometimes do not apply the appropriate methods of working with them.

**Formulation of the purposes of the article (a problem).** The objective of this article is to reveal the methodological aspects of the caricatures in a school history textbook in terms of research-based training in accordance with the generalized experience.

**Main body.** The sources that carry a lot of information include a poster, a caricature and advertising. They have been used in the history textbooks recently. They provide an important kind of information about the era; they sometimes add text information and perform the function of an independent historical source. However, it is worth for the authors to indicate that these sources can not be used for the precise quantitative characteristics of the historical development processes, but help them to identify the key trends.

As a genre, a caricature appeared long ago and was designed to deliver information or rather the interpretation of that or another phenomenon of the illiterate population. In this article, we find the term *caricature* as a genre of fine art (usually but not necessarily graphics), which is the main form of graphic satire, satirical or humorous form that depicts some social, socio-political, household phenomena, real people or characteristic types of people.

The authors of history textbooks should bear in mind that a caricature has certain characteristics as they must analyze it more thoroughly than posters and advertisements in combination with other sources, and they can not be objective because of its nature and essence.

In the process of interpretation and analysis of political caricatures posted in a tutorial, we offer to apply to the following algorithm:

Let us consider a caricature carefully. What is the date of its creation? Which historical event or phenomenon is it dedicated to?

1. Do you recognize the caricature characters? How? What are they doing? How are they dressed?

2. How much realistic or exaggerated characters and objects are? What are the means to achieve it?

3. Identify the symbols used in the cartoon. What do they mean? Why does the artist put them into the picture?

4. What is the inscription below the caricature? Is it the same story with the picture? What attitude does a cartoonist reflect on the characters or events?

5. In your opinion, what are the ideas and political views the author confesses on the picture? What can it be determined for?

6. What do you know about this historic event, the phenomenon, or the historical figures depicted in the caricature from other sources? Do you agree with the interpretation of the characters, events, phenomena, submitted by the caricature?

7. What new information have you received in the analysis of caricatures? Compare it with what is already known.

The teacher should organize work so that students have the opportunity to apply this algorithm several times in the classroom under his guidelines, before they can use it themselves. Compliance with such a detailed algorithm will help to develop the students' appropriate skills, observation, attention that it is essential to analyze and interpret cartoons.

Methodological value of a cartoon lies in the fact that it creates a vivid image, briefly and clearly sums up the essence of historical or social phenomena, events. The content of most cartoons are intuitive and allows students to get a sense of the views and attitudes of people in that time. However, students need to pay attention to the fact that caricatures usually reflect the attitude to the events, rather than the factual information about it. Cartoonists are often biased and do not attempt in expressing an objective viewpoint or presenting different points of view on the issue, as expressed customized (sometimes their own) opinion on an event so that they create a positive or negative impression by means of a picture, often using the certain stereotypes. For example, he/she can portray the character so that it will look credible or not, strong or weak, confident or the one that is hesitating, a patriot or a traitor.

The impact of the caricatures on the minds of great people is considerable, and sometimes they are a dangerous weapon. Let us recall the so-called caricature scandal that erupted in late 2005 – early 2006 and covered almost all of Europe and the Muslim world as well as the political conflict within the European countries. The reason for the conflict was the caricatures of Mohammed, the Islamic prophet, published in one of the Danish newspapers in 2005.

To understand the power of influence of cartoons, it is necessary to know the history of it as a genre. Cartoon as an art form has ancient origins. In particular, on the monuments of ancient Greece and Rome there are numerous pictures of humorous and satirical nature. Yet, caricature appears as a separate genre in the Renaissance, a picture that was made by a few quick stroke of the pen on the piece of paper. Its further spread is associated with the development of printing technology and prints. The most common technique appears to be the humiliation of an object portrayed and mockery of power. Thus, during the French Revolution, King Louis XVI is portrayed as a fat pig that has to be killed already, and his wife Marie Antoinette is shown as a wolf or panther, underscoring her brutal nature.

It is known that the Emperor Napoleon reacted to the caricatures of himself very sharply. He even demanded from the King of England to sentence these people like killers. Getting to know the way Napoleon reacted at the caricatures of himself, in Russia, in 1812, during the Russian-French War, a full-scale caricature campaign against the French emperor and his army was led by Mikhail Kutuzov, a chief of the Russian army who spread and even created the printing press at the special headquarters. Making fun of Napoleon, mocking his appearance, the Russian commander searched for the means to raise patriotic sentiments among the public and the army by means of a caricature.



French caricature "Beating Napoleon."



“Napoleon and skeleton”, a caricature made by T. Roulandson

When the caricature “Napoleon and skeleton,” by T. Roulandson was analyzed we have offered the students the following questions:

1. Which historical period is depicted in the caricature?
2. What is the main idea of this caricature?
3. What does this caricature make fun of (a politician’s appearance, his behavior, political event or phenomenon)?
4. What purpose was this caricature created for (is it shown to offend the politician, point to his significant errors, arouse public resentment, ridicule negative political phenomenon, etc.)? Why do you think so?
5. How do you feel about the main idea of this cartoon?

A caricature becomes the special recognition in the mid-nineteenth century, due to the emergence of a number of satirical magazines. At this time, a cartoon becomes more informative.

The authors of textbooks quite often use cartoons in the coverage of international relations of the period. In this case, a French caricature of the late 1890s, “The division of China by the European powers and Japan” is important. We propose an algorithm of its analysis:

Consider the picture and answer the questions.

1. Which historical event is the caricature dedicated to? What helped you to define it?
2. Do you recognize the characters of the caricatures? How?
3. Is the name of the caricature the same as the story?
4. What attitude does a cartoonist reflect for the characters and the events?
5. Do you agree with the interpretation of characters and events, submitted by the cartoons?



French caricature of the end of 1890  
“The division of China by the European powers and Japan”

A caricature was widespread during the First World War. Working with the caricatures of this period, a comparative approach to the caricatures in different warring countries may be applied. In particular, the study of the causes and preconditions of the World War I can offer the students to analyze the German caricature “Map of Europe 1914” with the task: What was the artist’s objective when he created a caricature? What ideas and political views of the author does the picture confess? How can it be determined? Prove your answer by the facts.



Analyzing the Russian caricatures of the World War I, we propose the following tasks for the students: What was the artist’s objective to create a caricature? What ideas were embodied by the figure? Whose interests are reflected? Do these ideas correspond to the other data sources on the history of World War I? How is the information obtained while analyzing cartoons related to other historical sources?



For comparison, students can be proposed to examine and analyze the previously given algorithm of the contemporary cartoonists' response to the retreat of troops of the Russian Empire from Galicia in the summer – autumn 1915.



The text on the picture: “Tsar” is running away from Galicia. After spending 10 months in Galicia, destroying our land, and destroying his army, the “White Tsar” is escaping from the Carpathian Ruthenia.”

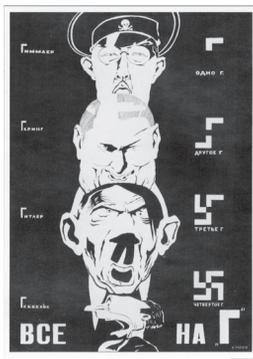


In the Soviet period, the official caricature served to achieve the political objectives: the fight against the “external enemy – capitalism” and some internal moral shortcomings of society “builders of socialism”, ridiculing parasitism, drunkenness, absenteeism and the like. Nevertheless, along with the official caricature there has always been underground one, such one that mocked the authorities it she could not do officially.

During the NEP period there were many different comic magazines, but their functioning was not long-lasting. In 1922, several satirical humor magazines such as “Crocodile”, “Smehach,” “Splinter” began to be published; later, in 1923, “Spotlight” (the “Pravda” newspaper) and a few more were founded. It published mainly undemanding literature reading, which was far from politics, tempered, though with cautious acceptance of the new Soviet reality: humoresques, unpretentious fun stories, poetry and parody, of course, caricatures. But these editions were an exception in Soviet periodicals and soon by the decision of the authorities they have been terminated; since 1930, “Crocodile” was the only Union satirical magazine.

The “Father of Nations”, Stalin, was not too fond of the caricatures. Many masters of this genre were violently punished. He allowed only that caricatures that openly showed all the best aspects of the Soviet citizen and mocked vices of capitalist relations. But during the Great Patriotic War, cartoon was remembered again as a powerful propaganda art.

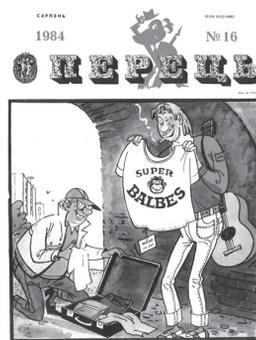
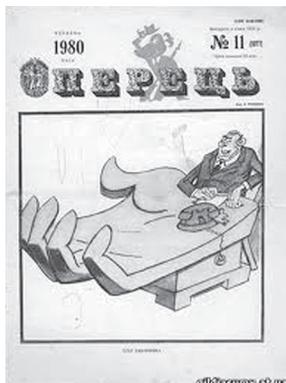
During the Second World War, a caricature has become an instrument of struggle and a means of raising patriotic spirit to some extent. At the beginning of the war, the famous poster made by Moor “Everything in G” (Gitler, Gimmler, Goering, Goebbels and the Russian letter T with the famous Russian swear word of the broad sense this letter and graphics in game four of these letters formed in Nazi sign).



Moore’s Poster “All in G”, the Poster of WWII. Kukrynikses.  
We will mercilessly defeat and destroy the enemy. Poster of 1941

The times of Khrushchev's thaw discovered some new opportunities to expand the scope of the official Soviet caricature, but all with the end of the Khrushchev thaw was over as quickly as it began. Internal political cartoon was not official, and it was almost the only area of Soviet life, which was subjected to ridicule the service sector. However, in January 1, 1967 by the decision of the Central Committee, "Literary Newspaper" has acquired a new format, when a chief editor Alexander Chakovskyy was appointed and appeared in the newspaper funnies "Club 12 Chairs" soon, which was led by Viktor Veselovsky and Elijah Suslov. It was possible to find a lot of qualitative caricatures. And since the beginning of the 70s there are informal clubs: a new generation of cartoonists often gather at homes to share new ideas, show their work, communicate and even try to organize a secret show.

Many bright caricatures were in "Perets", a Ukrainian humorous satirical illustrated magazine, which criticized such shortcomings, drinking, bureaucracy, paid attention to the fight against speculation, helplessness of administration and household affairs.



In the post-Soviet boundaries, comical themes were canceled. Any topic was open. At once, political caricature was the most widespread. Caricature of politicians filled all the newspapers and magazines, and there were the following new topics for cartoons: the oligarchs, criminals in power, corruption, a new look at the political struggle, new social problems.

When creating cartoons, especially the ones of the foreign nature, the authors often use the characters: John Bull or English Bulldog symbolizes Britain, a bear – Russia, Uncle Sam – USA, etc. So what are these characters? What is their story? It is important to reveal it in the text of a history textbook.

Uncle Sam (Eng. Uncle Sam) is the personified image of the United States. The character “Uncle Sam” is usually grotesque, satirical. But this image was used for patriotic propaganda. He was especially popular during World War II – Uncle Sam was depicted on a postcard that invited volunteers to join the US Army. This expression has become a synonymous symbol of the US federal government.

The exact history of this image will probably not be found ever. It is believed that the image of Uncle Sam emerged as the personification of the United States at the time of the British-American war of 1812. The prototype could be Uncle Sam, according to American folklore, butcher Samuel Wilson (Eng. Samuel Wilson), who supplied provisions to the New York military base Troy. Wilson marked tubs with meat U.S. letters, referring to the United States (Eng. United States), and the soldiers jokingly said that the meat came from Uncle Sam (Eng. Uncle Sam). There is another version, according to which 7 September 1813 Guardian Irish-questions, meaning letters to U.S. tubs, explained to them the name of the manufacturer – Uncle Sam (Eng. Uncle Sam). This is the consolidated version of the resolution of the US Congress on September 15, 1961, which officially declared Samuel Wilson to be the ancestor of American national symbol, that is the expression “Uncle Sam.”

Uncle Sam is such a colorful character, his image is often used on both patriotic and anti-American posters, in cartoons and comics.



As for the other characters, the combined image of a typical Englishman John Bull (John Bull John Bull; Eng. John Bull – literally John Bull), it comes from the rustic farmer with a pamphlet of John Arbetnota, a British journalist, “History of John Bull.”

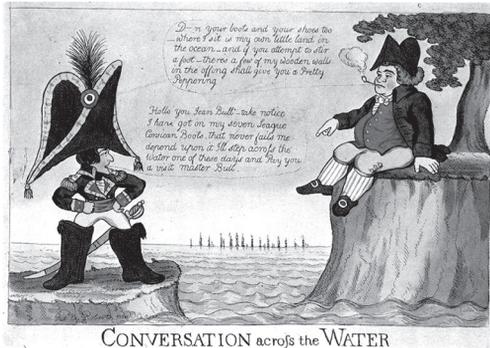
John Bull is depicted as a short fat guy with a sly red face, with essential whiskers, a red coat, white trousers or leggings and short cylinder or Shapoklyak sometimes with a telescope through which he is in safety and comfort viewed from its island across the Channel events that are taking place on the continent.



Military Recruiting Poster WWI with a canon of John Bull



Russian poster “sat by the sea, waited for the weather” with the images of the Trans-Baikal Cossack, Japanese Mikado, John Bull and Uncle Sam, 1904



CONVERSATION across the WATER

John Bull and Napoleon

In this genre, another textbook caricature character was the “Russian bear”. Bear belongs to a number of stable characters, for example, such characters as frost, Siberia, despotism, caviar, vodka, balalaika, and in recent times, they are ballet, matrioshka, Kalashnikov and corruption. But that bear was the plainest and popular feature of Russia to the Western mind.

A symbol of a bear is most often used to describe Russia in Western countries, particularly in Britain, and not always in a positive sense: sometimes this comparison implies that Russia is a “big, clumsy and cruel” country.

But the image of the “Russian bear” in the cartoons has changed over time, as it can be seen on the example of German cartoons in XIX-XX centuries. Below there is a caricature of 1863. Bear is one of the players of the political arena in Europe, Britain is represented by a lion, Italy – unicorn, Spain – bull, Prussia and Austria – two eagles and France – cock.

On this caricature, a negative attitude to Russia is expressed quite gently. Bear sat on his haunches in the bottom right of the picture, with a whip compressed in its paw.



Below there is a caricature made in 1855. A bear is bitten by Turkish bees in the Crimean War and it arouses not only malevolence but also pity:



A symbol of a bear on the caricature was inherited both by the Soviet Union and modern Russia. The following caricature is shown below.



**Conclusions.** Consequently, the long history of its existence, the caricature experienced many steps such as exaggerated picture of reality, cartoon, household scenes, genre sketches, book and magazine illustrations, political satire, and finally the philosophical understanding of reality. It usually reflects the problems of society and even from the earliest times served as a specific method of self offender or enemy.

Cartoon creates a vivid image, briefly and clearly sums up the essence of historical or social phenomena, events. But the authors of textbooks should remember that this type of source can not be used for the precise quantitative characteristics of the historical development, but it helps to identify the key trends. Consequently, a caricature is a kind of document of its time, where authors often emphasize the typical features of the certain historical and social phenomena; reveal their political nature; reveal (often on the negative side) image of a politician.

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*Мороз П. В.*

### **ВИКОРИСТАННЯ КАРИКАТУР В ШКІЛЬНОМУ ПІДРУЧНИКУ ВСЕСВІТНЬОЇ ІСТОРІЇ (МЕТОДИКА РОБОТИ В УМОВАХ ДОСЛІДНИЦЬКОГО НАВЧАННЯ)**

Автор статті зазначає, що важливою складовою повноцінного розвивального навчання на уроці історії є залучання у навчальний процес різних наочних засобів. Основним джерелом цих видів наочності має бути шкільний підручник. Це, на думку авторів, уможливить перетворити його на робочу книгу, яка спонукатиме учня працювати з нею самостійно. У статті розкрито особливості використання карикатур у шкільному підручнику всесвітньої історії, подано методика роботи з ними на уроках історії.

**Ключові слова:** шкільний підручник історії; структура підручника; ілюстративний матеріал; карикатури.

*Мороз П. В.*

### **ИСПОЛЬЗОВАНИЕ КАРИКАТУР В ШКОЛЬНЫХ УЧЕБНИКАХ ИСТОРИИ (МЕТОДИКА РАБОТЫ В УСЛОВИЯХ ИССЛЕДОВАТЕЛЬСКОГО ОБУЧЕНИЯ)**

Автор статьи отмечает, что важной составляющей полноценного развивающего обучения на уроке истории является вовлечение в учебный процесс различных наглядных средств. Основным источником этих видов наглядности должно быть школьный учебник. Это, по мнению авторов, позволит превратить его в рабочую книгу, которая будет побуждать ученика работать с ней самостоятельно. В статье раскрываются особенности использования карикатур в школьном учебнике всемирной истории, представлена методика работы с ними на уроках истории.

**Ключевые слова:** школьный учебник истории; структура учебника; иллюстративный материал; карикатуры.