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Introduction

Terrie Epstein and Carla L. Peck

This volume grew out of an American Educational Research Association–sponsored conference entitled "Teaching and Learning Difficult Histories: Global Concepts and Contexts," held in New York City on June 24–26, 2015. The aim was to bring together scholars from across the globe working on issues related to "difficult histories," a term that we defined at the time as "historical narratives and other forms (learning standards, curricular frameworks) that incorporate contested, painful and/or violent events into regional, national or global accounts of the past." We used the concept of difficult histories as a heuristic device for distinguishing the research included in this volume from a cognitive or disciplinary approach to research in history education, an orientation that dominated the field until recently in North America and Great Britain.

We have included in the volume all except two conference papers: Cinthia Salinas (University of Texas, U.S.) published her conference paper in the *International Journal of Multicultural Education* (Salinas & Alarcon, 2016), and Andrew Mycock (University of Huddersfield, U.K.) preferred to revise his paper on the World War I centenary and British "history wars" for publication in a journal. At the conference, participants presented their papers as part of a four-person panel organized by themes; each panel was followed by commentary by a leading scholar in the field. Following these presentations, participants divided themselves up among the presenters to discuss individual papers in greater depth. After a 45-minute discussion, the participants reconvened for 15 minutes to discuss larger themes. We mention the format because many presenters commented that this was the first time they had attended a conference where their work received serious and sustained attention. It made the conference a highly productive and memorable experience, one that we believe can be replicated in other settings.

In the following pages, we discuss three major theoretical frameworks in which history educators embed their research. These include disciplinary and sociocultural frameworks, as well as those organized around the concept of historical consciousness. We then put forward what we have termed a "critical sociocultural approach" to research in history education, arguing that it is a framework in which studies in any setting and society

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can be situated. We did not introduce the term at the conference but have developed—and continue to develop—the concept to highlight how concepts of power, identity and agency shape all historical narratives. While none of the chapters in the book employ the term, all refer implicitly or explicitly to how concepts of power, identity and/or agency influence the production and appropriation of historical narratives in specific national settings, especially as they relate to difficult histories, i.e., violent aspects of a national past that evoke contested and/or painful responses.

Disciplinary Approaches to Research

Disciplinary approaches to research in history education have framed the concept of history as that which is practiced by professional historians; within this framework, the immediate aim of history education is to develop young people's understanding of the nature of history as an academic discipline. Researchers who use a disciplinary approach have examined a range of young people's cognitive abilities, including how young people assess and interpret primary historical sources (Lee, Dickinson & Ashby, 2001; Shemilt, 1980; Wineburg, 1991), how they construct or critique historical claims or arguments (Nokes, 2010; Monte-Sano, 2011; Shemilt, 1987), or how well they understand second order (vs. substantive) concepts—change and continuity, cause and consequence, significance and empathy—that give meaning to history (Seixas, 1993; Seixas & Morton, 2013). Some studies have examined "progression" in students' historical thinking: as students mature, they develop more sophisticated understandings of the evaluation and interpretation of historical evidence and of second-order concepts (Lee, 2004).

Disciplinary approaches are grounded in psychological theories of cognition or constructivism. They focus on teaching history in order to transform young people's naïve understandings of historical accounts as true or singular representations of "what happened" in the past to their abilities to reconceptualize accounts as *interpretations* or reconstructions of the past based on evidence and rational thought (Lee & Shemilt, 2003). Instruction often is organized around a cognitive apprenticeship model: Teachers make explicit and scaffold historical thinking in relation to questions or evidence; students use objective reasoning to evaluate and synthesize historical evidence and construct defensible interpretations of the past in the form of narratives (Monte-Sano, 2008, Freedman, 2015). Disciplinary approaches caution against "presentism" or employing contemporary modes of thought in evaluating the motivations or behaviors of historical actors (Wineburg, 2001) and often promote the concept of detachment or "historical distance" (Grever, chapter 2 in this volume, Phillips, 2004) by bracketing out affective responses to historical sources or narratives in favor of more objective evaluations.

One critique of disciplinary approaches is their emphasis on teaching young people to construct objective evidence-based historical narratives,

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often in response to teacher- or test-posed questions, but not to focus on the broader interpretive frameworks in which all historical narratives are embedded (Bekerman & Zembylas, 2011; Freedman, 2015; Nordgren & Johansson, 2015). At an individual level, a historian's interpretive frame—her underlying assumptions, beliefs and/or ideologies—influence the questions she asks, the way she interprets evidence and the historical arguments she formulates in the form of a written narrative. The differences in historians' frames explain how two historians can pose the same question and evaluate the same evidence, yet generate different or even competing historical accounts, even as they abide by the profession's methodological criteria (Cronon, 1992, Troilloit, 1995).

At a broader level, national historical narratives distributed through schools, official media and historical sites often function to maintain those that give legitimacy to contemporary political alignments, as well as to sustain national identities that privilege dominant groups or cultures (Bekerman, 2016; Connerton, 1989; Nordgren & Johansson, 2015). Historians have recognized that their narratives are "not made in isolation but in conversation with others that occur in the contexts of community, broader politics and social dynamics" (Thelen, quoted in Wertsch, 2002, p. 59). Yet disciplinary approaches rarely ask young people to explore or "discover the mechanisms of power" (Nordgren & Johansson, 2015, p. 16) that underlie the framing of dominant or alternative historical narratives or the functions that they serve. By neglecting the role that political and social dynamics play in the production and distribution of historical narratives, disciplinary approaches can limit young's people's historical understanding.

Sociocultural Approaches to Research

Since the beginning of the 21st century, sociocultural approaches to research in history education have proliferated (Epstein & Salinas, in press). The approach examines how political, social and cultural contexts influence the historical narratives produced by national, subnational or transnational communities (Wertsch, 2002). They position historical narratives as "cultural tools . . . distributed across individuals and groups," in particular settings for particular purposes (p. 25). They provide a "usable past" (p. 31) meant in large part to create and maintain collective identities from which community members may derive a sense of self and belonging. A usable past also can construct boundaries between those who belong and those who do not, based on nationality, ethnicity, religion or other markers of difference. The extent to which people appropriate historical narratives circulated within national, ethnic or religious communities vary not just among individuals but also within individuals over time, depending on the purposes for and contexts in which historical narratives are employed (Barton & McCully, 2010; Peck, chapter 15 in this volume; Zembylas, chapter 12 in this volume).

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Sociocultural and disciplinary approaches to research differ in their assumptions about historical thinking and the nature of historical narratives. Disciplinary approaches often conceptualize historical thinking from the "inside out": An individual evaluates and synthesizes historical evidence to construct an argument about the causes, consequences or other aspects of historical events or other phenomena. She eschews or acknowledges and transcends her own beliefs about or commitments to particular perspectives and rationally evaluates evidence to construct an interpretation, taking into account the beliefs and behaviors of people in the past (Reisman & Wineburg, 2012). The product of historical thinking is an objective (or as objective as possible) historical narrative, based on an empirically rigorous analysis and synthesis of evidence (Freedman, 2015).

In contrast, sociocultural approaches view historical thinking from the "outside in": An individual evaluates evidence and constructs arguments about the past within the context of an "internal culturally mediated framework" (Wertsch, 2002, p. 26): i.e., a mental model of human thought and action conditioned by the historical, political and cultural contexts in which an individual has learned to act and think. While an individual can become aware of her and others' mental models, she can never entirely escape the mental model or framework she has constructed of how human thought and action operate. Every historical narrative, including those of the most professional historians, reflect the internal culturally mediated framework—which in turn reflects broader societal beliefs and knowledge—that the individual draws upon to think historically.

Sociocultural approaches to research have examined at least four overlapping areas. One is how official national historical narratives in and beyond schools reflect the ideologies of current political orders. A second approach examines if or how individuals/groups respond to (appropriate, resist, revise, amalgamate) official or other narratives. A third line of research has investigated how individuals'/groups' ethnic, religious, gendered, sexual or regional identities influence the production or appropriation of historical narratives (Peck, in press). A fourth and emerging area considers how individuals or groups in research, school or public settings negotiate individually or collectively competing or parallel meanings and significance of historical narratives. Almost all of the research encourages teaching young people to understand their and others' positioning in relation to the historical narratives they encounter (Peck, 2010) as well as examine the politico-social functions that particular narratives serve (Bekerman & Zembylas, 2016). All of the chapters included in this volume fit into one or more of these categories.

Historical Consciousness

Historical consciousness is a framework used primarily in parts of Europe. Since the 1970s and 1980s, the term has generated a number of complex

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meanings and models (Korber, 2015); Jörn Rüsen, the most widely cited researcher in the field, defined historical consciousness as "how the past is experienced and interpreted in order to understand the present and anticipate the future" (1987, p. 286). Advanced levels of historical consciousness include awareness of one's own historicity or "historical identity," as well as a connection to moral values: i.e., the acknowledgment of the "pluralism of viewpoints and the acceptance of the concrete 'otherness' of the other" (2004, p. 77). Seixas (2004) built on and explored Rüsen's conceptualization of historical consciousness and offers five principles that, he argues, are necessary to "push the theorizing on historical consciousness further in this cultural moment" (p. 10). Recently, Nordgren and Johansson (2015) integrated concepts of historical consciousness and cultural diversity to promote history education that developed "intercultural competence" (p. 6). Intercultural competence included the ability to construct evidence-based historical narratives (disciplinary approach), as well as the capability to deconstruct the assumptions and values that structure historical narratives, including those of one's own making and of the societies in which one lives.

In 1997, Angvick and von Borries published the findings of a survey examining the historical consciousness of more than 31,000 15 year olds in Europe, Turkey, Israel and Palestine. Their aim was to analyze and compare across nations students' historical consciousness or "the connection between young people's conceptions about the past, their evaluation of the present and their expectations of the future" (p. 22). When asked what factors in the past have influenced the present, adolescents across all countries selected scientific and technological advances as having had the biggest impact and prominent historical actors or ordinary people as having had the least. Factors such as migration, political reforms or wars had some but not overwhelming impact. They also perceived scientific advances as having the most significant impact on future developments, while all other factors were insignificant. When asked about whether historical change is best captured in terms of progress, decline or a cyclical or pendulum effect (i.e., ups and downs), a majority chose a series of ups and downs. The authors found this to be an "astonishing result" (p. 203), surprised by young people's ambiguous belief in progress.

More recently, Barca (2015) reported on a study comparing students' historical consciousness in Brazil and Portugal. Students in both nations associated recent global history with negative change and their own nation's history with a greater sense of progress. Portuguese students imagined their nation's recent history in terms of a straightforward linear progression, while Brazilian students considered both positive and negative aspects of change. In addition, Brazilian students positioned themselves as having some agency as temporal actors, while Portuguese students saw themselves as spectators, rather than actors, in relation to historical or contemporary change.

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Critical Approaches to Research

Zvi Bekerman and Michalinos Zembylas independently and collaboratively have published a prodigious amount on history education framed by critical theories. Working in conflict (Bekerman in Israel) and post-conflict (Zembylas in Cyprus) societies, they have situated research on students' and teachers' historical discourses around the "multiple relations of power in which these complexities are immersed" (Bekerman & Zembylas, 2016, p. 15). Much of the research has explicated how "hegemonic" or official historical narratives have played themselves out in classrooms and professional settings, yet they also have investigated the "small openings" where students and teachers present counter-hegemonic discourses in which one group in conflict sought solidarity with "the other" by recognizing the other's suffering. In a recent article, Bekerman and Zembylas (2016) reminded readers of how powerful groups influence history and society:

> what gets defined as the 'official' memory' or beliefs about . . . victimhood . . . reflects the power of certain groups and ideologies in society to define the pasts according to their interests, often by silencing alternative and competing discourses.
>
> (p. 16)

One of their greatest contributions is research on the role of emotions in the teaching and learning of history in post/conflict societies. Emotions, like "thinking," they posit, are not simply individual expressions; they are embedded in broader relations of power as "actions or ideological practices that serve specific purposes in the process of creating and negotiating reality" (2016, pp. 1008–1009). Similarly, historical narratives and emotions are mutually constitutive and work interactively "at the level of the individual and the social-political structures within school and the wider society" (p. 1021). Nations as well as subnational communities legitimize and seek to promote particular emotional responses to historical narratives, i.e., feelings of belonging and pride in the past, of sympathy or imagined trauma of victims and/or of grievance or forgiveness towards oppressors (Cole, 2007; Zembylas & Bekerman, 2008; Zembylas & Kambani, 2012). Rather than ignore or repress the complex emotional interactions around historical narratives, Bekerman and Zembylas have urged teachers to learn to "acknowledge and explore disturbing feelings" evoked by difficult historical events, but also engage in pedagogy that supports "all students in dealing with open wounds without reproducing the status quo" (p. 1023).

Critical Sociocultural Approach to Research

Our concept of a critical sociocultural approach to research builds on the significant theoretical foundation presented by Berkerman and Zembylas.

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Like them, we conceive of historical narratives as embedded in complex webs of power relations that influence whose and which historical narratives are legitimated, as well as how and why historical narratives are constructed, appropriated, contested and otherwise taken up in schools and societies. While Bekerman and Zembylas have examined social interactions around historical narratives in conflict and post-conflict societies and have contextualized their work within the fields of peace, multicultural and human rights education, we extend their theoretical insights into the production of and engagement with historical narratives that occur in all societies, including long-standing democratic ones.

For example, the chapters in this book related to teaching or learning the histories of Indigenous people are in the well-established democratic nations of Australia (Clark, chapter 5), Canada (Tinkham, chapter 8), New Zealand (Kidman, chapter 6; and Sheehan, Epstein and Harcourt, chapter 7) and the U.S. (Mayo, chapter 13, Stotskopf & Bermudez, chapter 11). The authors have demonstrated how hegemonic or official historical narratives have marginalized Indigenous experiences and sanitized the violence perpetrated against them by colonial and democratic governments. The chapters on Brazil (Schmidt, chapter 14), the Netherlands (Grever, chapter 2) and Singapore (Loh, chapter 3) similarly demonstrate how hegemonic narratives in democratic societies populate schools, the media and popular culture in ways that minimize nationally sanctioned violence or oppression. As elsewhere, teachers and students in these societies have responded variously to hegemonic narratives: In some settings, they resist official representations of "others" (Stoskopf & Bermudez, chapter 11 in this volume), appropriate narratives of traditional heroes and events (Schmidt, chapter 14 in this volume), and/or is often the case, consider and/or blend aspects of competing narratives (in this volume: Ahonen, chapter 1; McCully, chapter 10; Peck, chapter 15; Wasserman, chapter 4).

Drawing from Wertsch, we also emphasize the "sociocultural" within a critical sociocultural framework. As discussed earlier, sociocultural approaches examine the relationship between individual internal processes and the historical, cultural and institutional settings in which individuals think, feel and believe. As Wertsch (2002) has noted, "internal processes" do not just refer to rational thought; they also refer to feelings of attachment or alienation. He has made the distinction between mastering a historical narrative, or knowing its content and logic of argumentation, and appropriating it, or internalizing it or making it one's own, which involves an emotional or affective component. National or subnational historical narratives often serve as "identity resources" or cultural tools that promote attachments to broader communities, including feelings of belonging, grievance or forgiveness of "enemies" (Wertsch, 2000, 2002).

A critical sociocultural framework also contributes to a sociocultural framework through its criticality: It is grounded in the assumption that all historical narratives are embedded in asymmetrical power relations

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at classroom, community and national levels. It is within a critical sociocultural framework that the concept of difficult histories fruitfully can be explored. For example, members of marginalized groups in specific settings may or may not overtly resist or contest hegemonic narratives, but they often feel aggrieved or discounted (Epstein, 2009; Villareal, in press; Wilkinson, 2014). Teachers and students who identify with hegemonic narratives also may feel guilty or defensive when engaging with narratives about officially sanctioned violence towards marginalized groups (in this volume: Goldberg, chapter 9; Zembylas, chapter 12). Depending on the particular settings, identities, purposes and narratives under review, researchers have documented that teachers and students have appropriated, resisted, and/or integrated some but not all of—and/or then manipulated or forgot—the traditional alternative narratives with which they engaged (Cowan & Maitles, 2011; Den Heyer & Abbott, 2011; Fickel, 2005; Goldberg, 2013; Gross, 2014; Misco, 2008; Klein, 2010; Porat, 2006; Savenije, von Boxtel & Grever, 2014; Tupper & Cappello, 2008; Vansledright & Afflerback, 2000).

How might a critical sociocultural approach contribute to the field of history education generally and the exploration of difficult histories specifically? First, the approach foregrounds how power relations shape the broader political and cultural settings in which historical narratives are produced and circulated. While almost all societies promote national narratives that advance the ideological and material interests of those in power in contemporary societies (Connerton, 1989), they do so in very temporally and politically specific ways (see Ahonen, chapter 1). While contemporary narratives in U.S. history standards and textbooks, for example, have changed considerably in the past half-century, they still marginalize the historical experiences of people of color through what some have termed an "illusion of inclusion" (Heilig, Brown & Brown, 2012). Critical approaches may analyze the difference between additive approaches to the inclusion of marginalized group to more substantive critiques of the themes or interpretive frameworks in which marginalized groups' experiences are embedded.

Critical sociocultural approaches also promote research that examines how teachers have created opportunities for young people to deconstruct the purposes and structures of historical narratives. Critical and sociocultural theories attend to the contexts in which historical and other narratives circulate, the purposes they serve and the identities they privilege or omit (Collin & Reich, 2015, Segall, 1999). Students also learn to assess how the context, perspective, use and effects of historical narratives serve specific aims, such as social cohesion at one end of a continuum or the critical evaluation of one or more interpretations at the other. Not only do these exercises promote young people's disciplinary thinking (Chapman & Goldsmith, 2015), but they also advance the development of more critical understandings of how authorial perspectives, shaped by sociopolitical contexts, influence the writing of historical narratives (Freedman, 2015).

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A critical sociocultural approach also takes into account the emotional dimensions of history teaching and learning, particularly in relation to difficult histories. Teaching and learning difficult histories evoke emotions that often differ based on the cultural identities and affiliations of young people and teachers. While asking young people to assume historical distance, examine multiple perspectives or de-center their own views when studying difficult histories may be appropriate in some settings, this may be inappropriate or harmful in others (Nordgren & Johansson, 2015; van Boxtel, Grever & Klein, 2016). Beginning by asking young people to recognize their emotional responses to difficult histories may be a more productive approach, especially among those who feel aggrieved by or defensive about nationally sanctioned violence (Epstein, 2009; Villareal, in press). This area of research may be productively employed not only in conflict and post-conflict societies, but in long-established democratic societies, which tend to downplay the nation's past (and present) violence against marginalized people.

Finally, a critical sociocultural approach creates opportunities for young people to analyze their own and others' narratives in ways that reveal rather than conceal or leave unattended the underlying assumptions and absences that structure all historical narratives (Peck, 2010). Teachers may work with students over the course of a year to analyze the perspectives from which historical narratives are presented and the purposes they serve, recognize the agency as well as victimization in ordinary and marginalized people's experiences, compare the lessons of difficult histories to contemporary issues and injustices, and imagine their own agency as temporal beings to affect change (Epstein, Mayorga & Nelson, 2011; Rüsen, 2004).

The chapters in this volume are organized as follows: *Section 1: Re-Presentations of Difficult Histories* includes contributions by Ahonen, Grever, Loh and Wasserman, with commentary by Seixas. *Section 2: Teaching and Learning Indigenous Histories* includes contributions by Clark; Kidman; Sheehan, Epstein and Harcourt; and Tinkham, with commentary by Ahonen. *Section 3: Teachers and Teaching Difficult Histories* includes contributions by Goldberg, McCully, Stoskopf and Bermudez, and Zembylas, with commentary by Grever. Finally, *Section 4: History and Identity*, includes contributions by Mayo, Schmidt and Peck, with commentary by Epstein. Our intention is that the chapters in this volume lay a foundation for research upon which others will build to investigate how difficult histories may be productively taught and learned in diverse national settings.

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