History education research in Portugal: methodological options

Investigar em educação histórica em Portugal: opções metodológicas

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ABSTRACT

Research in history education aims to understand the subjects' historical thinking at meta-historical and substantive levels. Its main focus is the ideas of the agents involved in learning within formal education contexts. In a methodological perspective, both systematic and action-research studies in that field have mainly followed essentially qualitative approaches with an additional quantitative data analysis. The article discusses procedures and results of some studies carried out in Portugal in the light of methodological options and concepts entangled in the nature of history.

Keywords: Qualitative methods in historical cognition. Epistemology and methodology in research. Inductive data analysis. Conceptual progression in history education.

RESUMO

A pesquisa em educação histórica visa compreender o pensamento histórico dos sujeitos a nível substantivo e meta-histórico, sobretudo no que concerne aos agentes da aprendizagem no contexto da educação formal. No plano metodológico, quer os estudos sistemáticos quer os de investigação-ação têm privilegiado abordagens de natureza essencialmente qualitativa, acompa-nhadas de análise quantitativa de dados. Neste artigo discutem-se processos e resultados de alguns desses estudos em Portugal, à luz das opções meto-dológicas e de conceitos inerentes à História.

Palavras-chave: Métodos qualitativos em cognição histórica. Epistemologia e metodologia da pesquisa. Análise indutiva de dados. Progressão conceptual em educação histórica.

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Introduction

The main focus of research on history education in Portugal has been students' ideas about historical concepts as well as related conceptions and practices of history teachers (LEE, 2005). Nevertheless, research on textbooks and curricula has also been carried out. In addition to those systematic studies, more rigorous in their methodology and deeper in epistemological questions, some teachers have conducted action research to test this approach in the field, under the concept of workshop in history classroom (BARCA, 2004). I discuss here four systematic studies carried out in history education to exemplify some of the investigative practices in Portugal. It is not a review of these studies, but rather a brief discussion about the rational, concerns, and motives behind some decisions and their operationalization throughout the investigative process, seeking to establish a relationship between theory and methodological procedures. It is an investigative exercise on studies in which I got involved as an author, co-author or doctoral supervisor. The studies are the following:

A. Students' ideas about provisional historical explanation
B. Teachers' conceptions on narrative and historical consciousness
C. Students' narratives on history in time
D. Conceptions and practices in history education

I tried to elaborate an archeology of these four studies which I present here in the light of a framework consisting of three presuppositions:

• Epistemology of history
• Epistemology of education
• Research methodology in education

A. Students' ideas about provisional historical explanation

Epistemology of History. This PhD study focused on notions of explanation in history and its provisional nature (BARCA, 1996, 2000). There I discussed various perspectives under this focus and among them I selected the approach that recognizes the possibility of existing concomitant, divergent explanations as part of the nature of history. On this issue, one must distinguish the concepts

of explanation (for question of 'why it happened' or 'how something could happen' in the past) from hypothetical argumentation when evidence about what happened is absent (such as to the question whether the arrival of Cabral's navy to lands that are now Brazilian was intentional or occurred by chance). In my study, to make the students thinking about the factors that best could explain an Eastern 'maritime empire' created by a small country in Western Europe, I proposed an argumentation based on four historical versions or perspectives (A, B, C and D), accompanied by several primary and secondary sources. Each version is an extract from larger works and emphasizes one or more different factors to explain (and eventually describe) the Portuguese domain in the Indian Ocean at the beginning of the sixteenth-century.

Version A written by the historian Oliveira Marques (1980) stresses that the fact of Muslim countries have strengthened their power on land-based military force was a very contributory factor: "It was very helpful to the Portuguese that none of these great Muslim states [Egyptian and Turkish] based their force on the sea "(page 327). Version B, a translated and adapted excerpt from the work of Arnold Pacey (1990), emphasizes the previous Chinese power in the Indian ocean, and launches an explanatory hypothesis with counterfactual contours: "One might ask what would have happened if the Chinese still controlled the Indian Ocean when the Portuguese arrived "(p.62). Version C, an excerpt from the single history textbook existing in a given period of the New State in Portugal, written by A. Mattoso (1946), emphasizes subjective conditions of nationalist tone: "This vast domain, conquered in a short time and with limited resources of men and money, can only be explained by the moral rectitude of the great Portuguese chiefs, by the sacrifices for the country made by all" (306). The D version, an account produced by the researcher based on two books for young people (BARCA, 2000), only describes the process of the maritime explorations in the fifteenth-century and suggests no argumentation of explanatory type:

> The Prince Henry sailors were those who took the first and most difficult steps [...]. Meanwhile, between 1405 and 1433, the emperors of China sent large armies to explore the Indian Ocean [...]. Vasco da Gama arrived in India in 1498. From then on, the Portuguese quickly began to explore the profitable spice trade (271).

Students were asked to perform a set of tasks based on the four versions given. They are discussed below.

Epistemology of Education. At the educational level, the research sought to take into account the unusual manner of placing a historical question to young students as well as their unfamiliarity with the challenging proposal of making inferences based on divergent historiographical perspectives.

One caution was to select a historical topic already studied by the participating students. To reduce some other obstacles causing feelings of strangeness and complexity about the tasks, the instruments application procedures followed key principles of cognition. Thus, besides trying to create an affable environment close to a classroom situation, I oriented the accomplishment of the tasks in a process of gradual complexity. After requesting the collaboration of all participants in the research exercise, I proceeded to distribute the material and read it aloud.

The instrument included a set of five tasks in a questionnaire format and followed the principle of starting from the students' previous conceptions and thus gradually stimulating a more complex historical thinking. The five tasks of the questionnaire were oriented as follows:

1. Request of a global explanation as first impressions to answer the central question (Explain in your words why the Portuguese succeeded [...]).
2. A set of intermediate questions, of reasoning scaffold to lead to the analysis of the specific messages of each of the four historical versions given (ex. "What differences do you notice between versions A and C, B and D? ").
3. Two first questions already directly oriented to epistemological or 'second-order' reasoning ('Why are there different explanations [...], Do you think that one of the explanations can be considered better than any other? Justify your answer").
4. A set of five questions also oriented towards an epistemological reasoning, with more detailed scrutiny on the relative validity of each version presented (e.g., "where does the 1st version – the one you chose in first place – explain better than the 2nd in relation to the Portuguese domain in the Indian ocean? Do you consider the 1st version better justified by the sources? Why? ").
5. A final task of advanced epistemological challenge, of selecting who could better explain the Portuguese domain in the Indian Ocean ("a) a recent author, because she can compare more varied points of view; b) an important author [...], neutral? c) a witness of the time, because she saw what really happened, d) a Portuguese who participated in these events [...]?").

The construction of instruments for data collection including these and other questions respected the methodological design presented below.

Research methodology. The research was undertaken as a cross-sectional descriptive study (in three years of schooling), with a qualitative and quantitative approach that we can now designate as mixed methods (RIAZI; CANDLIN, 2014). Due to its qualitative component with reflections on some sampling options, this design implied from the beginning a non-generalisation of results to a large student population. Also, in a qualitative scope, the Grounded Theory method was chosen with its various phases of data collection for a progressive refining of instruments (two exploratory studies, four pilot studies and a final study), and with an inductive data analysis based on open, axial and selective coding. For the final study, the target population were students learning history in the 7th, 9th and 11th years of classes, in schools located in the north of Portugal and linked to the history teacher training of the University of Minho. To deepen the inductive analysis of data, I decided to focus the study on a sample of six classes – three classes in each of two schools; I selected two schools with different cultural strata (predominantly rural or urban contexts), and in each one I selected a random sample of the three classes, one per year of schooling (7th, 9th and 10th). The application of the instruments followed systematic and identical procedures in the six classes.

Data analysis was guided by the Grounded Theory method. In the final study, this analysis resulted in the proposal of a categorization model of students' ideas about the provisional explanation in history, in 5 levels of conceptual progression: 1) "the story", 2) "the right explanation", 3) "the more factors the better", 4) "a consensual explanation?" and, 5) "perspective".

The quantitative approach came to illuminate some relevant characteristics of the student sample and the results of the analysis. For example, the frequency distribution of conceptual progression levels revealed that level 3, which is based on the criterion of quantity of factors to assess the quality of a historical explanation, reached 46% of responses, followed by the level of restricted explanation (level 2) and descriptive (level 1), with 21% and 19%, respectively. Levels based on more elaborate criteria, of neutrality and consensus (level 4) and perspective (level 5), were the least frequent with 10% and 1%, respectively. The chi-square test revealed a significant difference of conceptual levels per year of schooling (at 5% level). In a more detailed examination, level 1, corresponding to a less elaborate, descriptive thinking, was observed only in 7th and 9th graders, and level 5, linked to a more elaborate idea of explanation allied to an emerging notion of perspective, emerged only in the 11th year; level 3, where the explanation is valued by the factorial quantity, was observed in the three years of schooling but with a higher incidence in the two upper school-

ing strata (9 and 11 years); level 4, based on the idea of neutral and consensual explanation, occurred in the opposite direction.

Therefore, one of the results suggested by the study indicates that the students interviewed tend to develop an explanatory thinking but still very much based on the criterion of 'cut and paste', valuing the sum of factors (COLLINGWOOD, 1946), but without concerns of testing the validity of statements or reinforcing the explanatory power through the use of a variety of sources and perspective-crossing.

B. Teacher conceptions on narrative and historical consciousness

Epistemology of History. The PhD study sought to understand teachers' historical thinking, a focus still scarcely explored in this area of research (GAGO, 2007). At the time, only one study of a quantitative nature was produced in Portugal, suggesting the need of further scrutiny of teachers' conceptual framework especially concerned with classroom practices (MAGALHÃES, 2002). The thesis of Marília Gago was based on a solid epistemological framework referring to historical narrative, a notion she discussed in several perspectives from the relativist one to the compromise between "internal realism and perspectiveful objectivity" (GAGO, 2007, p. 50). In the conceptualization of historical narrative, she adopted a balance between internal realism and objectivity as a theoretical basis to illuminate the construction of historical consciousness profiles in teachers. To this end, among several issues the researcher presented the participants with a few pairs of narratives, one of them being on Salazar's dictatorship focused either in an economical or a political dimension:

> **Narrative 1**. The New State was in power in Portugal between 1933 and 1974. During much of this period the destinies of the country were designed by António O. Salazar. Salazar bet on reducing expenses, recovering the country financially. During this period there was political stability, including during World War II when he opted for a position of some 'neutrality'. With the beginning of the World War the economic boom was frankly shaken.
> **Narrative 2**. The New State was in power in Portugal between 1933 and 1974. During much of this period, Antonio O. Salazar was President of the Council (of ministers), especially between 1933-1969. Political stability was achieved in Portugal but at the expense of a dictatorial model

in which there were no free elections, freedom of choice or freedom of expression of thought. With the end of World War II and the beginning of the Colonial War, the political opposition becomes more pronounced [...].

Concomitantly, the notion of narrative and its relation to historical consciousness in everyone was discussed largely under the inspiration of Rüsen's (2001) philosophical reflections. Following this author's ideas, it should be noted that in addition to the assumption of the descriptive-explanatory structure of the historical narrative as a privileged means of communication in historiography, Gago also explored another perspective about the meaning of narrative – the 'abbreviated narrative' with its symbolic power indicating a certain identity orientation. The "linkage of narrative and historical consciousness" (GAGO, 2007, 84) thus provided theoretical bases for constructing four conceptual profiles, whose ranking suggests a progressive elaboration of the idea of history and consequent forms of historical consciousness: 1) "the substantive past", 2) "lessons from the past", 3) "lessons from a past in evolution" and, 4) "continuities and differences between times".

Epistemology of Education. In the line of situated cognition, this research considers the relevance of the teachers' action as co-agents of their students' learning. As mentioned, empirical studies in history education are scarce under this focus, and those that exist are mainly directed toward teachers in initial education (some of them are discussed in this thesis). Therefore, inquiring teachers and, above all, looking at their conceptual world is always an arduous task and requires increased care, a concern already widely discussed by researchers in education (and that Gago refers to). It should be noted that, in this line, it is intended to look at teachers as an essential ally and not as an obstacle to the desirable learning of children and young people; it is essential to invite them to a culture of reflection and dialogue in a constructive way. This attitude has helped to opening doors of schools and classrooms to our research activity because if we are educational researchers and teacher educators we work mainly for teachers and with teachers. Thus, the selection of the participating sample took into account constraints and challenges.

The design of the instruments for data collection (by inquiry) sought to follow the principles of surveying prior conceptions to gradually progressing on the complexity of the issues to be addressed. Thus, the initial questions were of direct and generic response or directed to aspects of substantive historical content, to evolve into much less usual issues over second-order ideas in history. For example, on teaching and learning in history, each participant was asked to rank by order of importance a set of statements such as "developing the moral judgment on historical events" and, about a set of substantive topics, to choose

"three which promote the development of skills at the historical narrative level". From these initial exercises, the instrument advanced to deeper cognitive challenges in which a reflection of epistemological character was stimulated including in the educational field. For instance, the role of the teacher as a challenger of meaningful learning has been activated for example, by discussing pairs of somewhat divergent narratives on the same historical subject. After a silent reading of the narratives, the interviewer asked each participant a set of questions such as "in your view, if you present these two narratives to your students can they orient them today and for the future?" This and other procedures contributed to the researcher obtaining valid data for a relevant analysis.

Research methodology. In terms of 'grammar' of research methodology the design was essentially qualitative, according to the principles of Grounded Theory accompanied by quantitative analysis to clarify some trends regarding the characterization of both the participant sample and the teachers' profiles (of historical and educational thinking). The characteristics of this quantitative analysis, which included several statistical tests, allow me to consider the study as close to a mixed methods approach (RIAZI; CANDLIN, 2014). However, there was no intention of generalization of results.

The empirical study included an exploratory phase, a pilot phase (with three moments of data collection that included a questionnaire applied to history teachers in UK), and a final phase. Although the sampling was deliberate, there was a concern with ensuring the sample of considerable heterogeneity. For the final study, it covered the north and south of the country and was stratified according to the criterion of professional experience (undergraduate students year 4, teachers in initial education, holding 3 to 10 years, and more than 10 years of experience); teachers of basic education cycle 3 and of secondary education; teachers linked to the public, private and cooperative sectors of education. Taking into account these criteria, the students covered by the teaching of the participating teachers might involve a broad spectrum of school achievement in history. A set of 48 participating teachers was obtained, with 12 elements per 'professional' stratum. In each stratum there were six elements from the northern region of the country (Braga city) and six from the south region (Évora city).

The instrument for data collection consisted of an individual interview with an interactive questionnaire (GAGO, 2007, p. 176), following guide-lines that included a set of historical materials and proposals for reflection in a dialogue between interviewer and interviewee, within respect for the methodological and ethical dimensions of research.

The inductive analysis of data gave rise to a categorization of the conceptions manifested by the teachers about historical narrative and historical consciousness. Those conceptions were distributed by four profiles, as already stated previously.

To refer to some results in more elaborate profiles, in profile 3, "lessons from a past in evolution", teachers consider legitimate the existence of several historical narratives although a consensus must be tried in order to understand the past and present as a continuum, with total neutrality. In profile 4, the historical sense of several narratives is dynamically accepted, they are considered the fruit of inter-related subjectivities, and their validity must be debated. Comparing narratives with various messages will contribute to students' critical thinking development early on, and it will be helpful for them to try to assess which will be the best. This keenness of critical thinking is important for them to pay attention to every-day and media information. But it is also important to "take a stand and argue in relation to any decision-making," as one teacher with 5 years of teaching said.

Within the quantitative analysis approach, the distribution of participants' ideas by profiles revealed a greater tendency for notions which, in terms of temporal orientation, link the importance of history to lessons of the past conceived mainly as an evolution (about 50% of the sample). A more dynamic idea of the past integrating continuities and differences between times was manifested by one teacher only. Several statistical tests were carried out for a number of particular issues where conceptual tendencies were not so obvious. For example, for the answers to a multiple-choice item on national identity symbols (which could indicate either a more conventional or a more open historical conscious-ness), the hypotheses test for proportions of the importance attributed to the various identity symbols was applied. The test revealed that the participants attributed high importance as national symbols to language, flag and anthem, to contrary to other less institutional ones such as port wine, cod, 'fado' song, or others located only in a given time such as caravels and red carnation flower [symbol of the 1974 democratic revolution in Portugal].

On the whole, the study suggests that the structuralist model in a perspec-tive of single and neutral history still strongly influences the historical thinking of those teachers who attend or have attended a history course (in the past). It is urgent to stimulate the use of interpretation and argumentation in class over diversified versions of history in order to effectively create a more analytical and open-minded thought toward what is different.

C. Student Narratives on history in time

Epistemology of History. The central concern in this study published as an international journal article was to explore narratives of young students in order

to analyze the conceptualization of explanation and empathy in history inherent to substantive knowledge about movements of peoples over time (BARCA; CASTRO; AMARAL, 2010).

It was presupposed that historical reasoning needs a solid and coherent substantive framework to assume the potential of history to establish relationships between past, present, and possible future scenarios, to be expressed by narrative. Thus, concepts of narrative, empathy, and temporal orientation were interlinked considering that they can be explored in history at a deeper, diachronic level. The movements and interactions of peoples contain several, sometimes conflicting motivations which lead to several consequences in short, medium and long term. Therefore, it was launched the research question, "what are the conceptual frameworks that young Portuguese construct when they think about the movements of peoples throughout history?" Associating this concern with the assumption that the narrative constitutes a privileged form of communication of historical thought, it was suggested to the students two narrative tasks to be developed from two excerpts of historiographical narratives. The first task focused the movement of peoples to the Iberian Peninsula since the fifth-century, in a perspective that could touch the sense of national identity; the second task evoked the first human movements from Africa and considered human migrations for 50,000 years in the perspective of global humanity.

Epistemology of Education. The design of the study, and in particular the construction of the instruments and data collection procedures, took into account the principles of contextualized learning. Firstly, because we considered students' previous ideas and some knowledge which eventually students might have about past movements of people: according to the history syllabus, the 7th grade students had already studied in class some topics of national and global history related to the tasks proposed. Secondly, because the tasks contained a somewhat controlled challenge in proposing a personal narrative about possible scenarios of the past (if little known to them) and eventually of the present:

Task 1. Continue the History considering the arrival of other peoples and groups to Portugal in the present times.

Task 2. Continue the History considering the movements of peoples all over the world until the present times.

Research methodology. The methodological procedures essentially assumed a qualitative approach with an additional quantitative analysis to illuminate the tendencies of the conceptual profiles obtained by the inductive data

analysis. In a non-random sampling procedure, a school was selected in a small city in the north of the country with a relatively heterogeneous student population in terms of socioeconomic context (family contexts linked to industrial, commercial and tertiary activities, and unemployment in some cases), with medium school achievement rate including in history. The study involved 47 students aged 12 and 13 from two classes taught by a teacher who offered to apply the two tasks to the students. By then, the students were studying Classical Antiquity and had already approached in the previous two years of schooling the History of Portugal from Prehistory to Contemporaneity. The tasks were applied in two lessons with an interval of two weeks, and each one consumed about 20 minutes.

The categorization of the students' accounts followed the model of inductive analysis widely used in this line of history education from its beginnings (as already mentioned), and gradually refined under inspiration of the by the Grounded Theory. The analysis sought to generate a set of conceptual categories in coherence with the previously set epistemological bases, proposing to ally second order and substantive concepts: (a) relations of past, present and plausible futures; (b) historical narrative structure (logic and chronology, notions of explanation and empathy); (c) substantive ideas about human movements and interactions. From this analysis resulted a set of levels constructed under the model of conceptual progression: 1) "presentism, or fictional past", 2) "a fragment of the past"; 3) "binary time" and; 4) ". dDynamic tTime".

At level 1, the narratives present non-historical portraits linked to the present or as a fictional past, with no grounds of evidence. Despite this focus on current everyday life – or fiction – as given in examples A and B below, the statements contain intentional explanations (people's motives for migrating and interacting with each other):

> (Participant A) Task 1. *Portugal "adopted" many peoples from America, France and Brazil. The Portuguese go to other countries in search of a better financial situation.*
> Task 2. Today people go to the richest countries like France and Switzerland. Portugal has great financial difficulties [and as a result] there is emigration.
> (Participant B) Task 2. *As Portugal had no slavery, it had great conditions of life and commerce, all the people came to Portugal ... Muslims, Romans, Hebrews, Egyptians.*

At level 2, the narratives present for past migrations in the past only an objective factor (looking for raw materials) or stereotyped motives ("good

climate", "for a better life"). At level 3, the narratives cluster two temporal segments, past and present. The past is substantiated by reference to one or two peoples. They have a variety of motivations mainly related to survival, conquest and economy, but on a stereotyped level; *eg.*: "people who came from other countries to the Iberian Peninsula looked for wealth, good climate, and conditions to expand their land and religion". At level 4, historical pictures tend to present more diversity of motives and strategies for migration and social contacts. This diversity eventually suggests either sources of tension brought about by conquest or peaceful trade-related interactions.

> (Participant C) Task 2. *The Phoenicians, Greeks, and Carthaginians came to the Iberian Peninsula to trade, and so established colonies and trading stands. The Romans conquered lands around the Mediterranean. The Arab people conquered lands in Africa, Asia and Europe. Later, the Portuguese went to discoveries and conquests by sea.*

Within a quantitative approach, the frequency distribution of the narrative frame by conceptual levels revealed a strong presence of the two less elaborated levels in both the national task ($N = 30$) and the global task ($N = 31$). In most historical narratives (levels 3 and 4) most took the form of "binary time" in the national task, and "dynamic time" in the global task.

We can conclude in this study that the participating students tend to present brief, fragmented or chronological narratives about some aspects related to peoples' migrations in the past and, especially, in the present. On the other hand, students recognize reasons or motives for the human movements and, when some of them give their statements based on historical evidence, they allude also to the diversity of their motivations. However, this sense of diversity only suggests situations of contact between peoples due to the actions of one of the parties through peaceful or aggressive ways, without discussing interactions resulting from these contacts.

D. Conceptions and practices of history education

Epistemology of History. This study was set up as a doctoral thesis (LAGARTO, 2017). After discussion of some historiographical models that

influenced the formal teaching of history in Portugal, the theoretical framework included the analysis of the matrix and the typology of historical conscious-ness proposed by Rüsen (2001). This was carried out in a theoretical dialogue with research productions in history education and with the educational praxis of teaching and learning. The latter evokes an objective example of the need for orientation in daily school life and history class through historical culture. This praxis is carried out both by teachers in their professional activity and by students when they construct meaningful learning for themselves.

Epistemology of Education. Some of the educational assumptions in the line advocated and practiced in history education are here spelled out and dis-cussed, namely the need to attend to the students' previous ideas so that, from there, the teacher can consolidate a scaffold that will provide the students with possibility of broadening and deepening their conceptual world. The research looks particularly at the students' construction of a global picture of past issues to allow establishing meaningful temporal relations. In this concern, attention should also be paid to evaluation issues, from a conceptual 'constructivist' and contextualized perspective, in a posture distant from superficial learning proposals and contexts of non-directivity. Personal reflection and interaction in dialogue should be encouraged among students, not forgetting that teachers are responsible for favoring these conditions in view of conceptual progression and development of other broad educational competences.

This is a relevant discussion since it is common to see a certain confusion between advocating diversified practices in which individual and group work is combined with teachers lecturing oriented to the students' cognitive challenge, and something very different when, in the name of constructivism, formally active but conceptually poor practices are developed.

Research methodology. Since the study aimed to understand history class practices and how they contribute to developing students' historical thinking, it was considered appropriate to maintain a predominantly qualitative approach but emphasizing triangulation of instruments and outcomes. Thus, if the Grounded Theory method offered advantages to seek to understand a complex phenomenon such as that of a lesson in action, the researcher selected not only the technique of the survey (by interviewing teachers and by questionnaire to students) but also the technique of direct observation of lessons. In the final study, in the interviews after class observation the researcher encouraged the two participat-ing teachers to include some tasks directly oriented to a second order reasoning (for example, about ideas of change in history). It was a way of stimulating the potential of the history workshop class, which was already practiced formally by these participant teachers. With those cognitive challenges the teaching activity assumed action-research contours for the participating teachers. In addition, the

study shared a concern common to other studies in this area, that of carrying out a quantitative analysis to shed some light on the frequency distribution of various trends in the results.

The empirical research was developed in three phases, and all the data set was analyzed – class records, teachers' interviews in previous and after class moments, students' questionnaires in class. With this methodological architecture, the researcher constructed a typology of 7 profiles of lesson moments (there is no fixed teaching profile per lesson but rather more or less interactive, or more or less conceptually challenging moments to the students).

The criteria for generating the teaching profiles encompassed formal aspects (types of classroom interaction) and teacher lecturing and inquiry historically oriented (whether toward students' regurgitation, source interpretation, historical understanding). Profiles 1, 2 and 3 are characterized by moments centered, respectively, on teacher lecture, a mixture of lecture and dialogue between teacher and class, inclusion of group work in order to obtain fixed answers in history; profiles 4 and 5 are characterized, respectively, by source interpretation activities in dialogue with the whole class or by similar activities but in written tasks in which the students have more time to think and evaluation already takes a formative character; the more challenging learning profiles 6 and 7 focus more on tasks of source interpretation and historical understanding proposed to students in small groups; the profile 7 stands out for integrating a metacognitive evaluation, involving discussion of objectives and results.

The analysis of tasks carried out by students on source interpretation and historical understanding (one of its focus, proposed by the researcher, privileged the concept of change) showed that the teacher concern with evaluation in process was associated to a higher frequency of more elaborate levels of historical thinking. The researcher reflected on diversified factors regarding the differentiated teachers' practices (who always integrated moments more or less interactive and more or less expositive) – contexts for lesson planning, conceptions about what is a 'good lesson' of history, influences of professional education. This last factor for teaching practices seems to have had relevance in profiles 6 and 7 (more challenging for student learning), which correspond to the practices of continuing education offered in the specific area.

About Potentials and Constraints: Some Conclusions

The studies carried out within the perspective of history education have given positive results mainly to the understanding of children and young people's historical ideas in several countries, including Portuguese speaking countries like Brazil and Portugal. It has also contributed to better understand teachers' thinking and practices and that will foster a more informed reflection among the teaching community.

The epistemology of history is one of the pillars that solidly support this line of research, as it provides elements for understanding how important it is to give historical meaning to time. This pillar together with educational principles mainly related to cognition not only influences the selection of the object and the questions to be investigated but also inspires the methodological directions to take throughout the process. The methodological systematization is also essential to guarantee the validity of the results; however, a methodologically irreproachable study if it is oriented towards superficial analysis of data either in a quantitative or in a qualitative approach can obtain good quotation for publication but will not bring interesting contributions to the practices of history teaching and learning. That is, if a study proposes to investigate the explanations of a given participant sample, for example, about World War I, it will be of little use to inquire whether the explanations subjects have about this past situation are right, wrong or incomplete (as is done in many examinations), but rather it will be useful to understand the reasoning that point to more or less plausible and consistent explanations in light of the available evidence.

As main potentialities this broad research focus offers conditions to provide teacher educators and teachers in the field: a) a diagnostic framework on conceptions about several features of historical thinking – notions of evidence, explanation, objectivity, explanation, communication by narrative etc; b) suggestions of questions to be posed to the students, assuming that they must be adapted to the specific contexts and used in a gradual way; c) clues for the analysis of the students' responses, provided that, it meets the categories of ideas that are considered epistemologically more elaborate; d) ideas of conscious monitoring of learning, with a view to fostering a conceptual progression; e) promotion of young people' historical consciousness oriented towards a perspective of humanity, namely a neo-humanism that integrates the idea of interculturality. This is a concept that can relate to historical empathy, which entails perhaps a deeper meaning because it holds a diachronic sense.

Within the framework of conceptual diagnosis, attention must also be given to learning constraints that can become challenges. For example, several evidence suggest that students and teachers' historical thinking in Portugal (study A) takes an explanatory structure, which is positive; but at the same time it tends to accept the consensual explanation without recognizing that divergence is part of human nature, and so it must also be part of history (studies A and B). Therefore, at the level of history teacher education it is necessary to rethink such model of understanding history which is no longer compatible with epistemological advances and even with living in an open society. There is also evidence (study C) that the historical narrative which, in a broad sense, is the vehicle for expressing ideas through writing, or dialogue, or image – and that mirrors the historical consciousness of who produces it and of whom adheres to – is not satisfactorily practiced at least among students aged 12-13 years. Most of these young people gave brief or fragmented narratives, or mere chronological lists, on some aspects related to the migrations of peoples in the past and present. This might be an issue to keep in mind in class practices – organizing ideas for writing will help strengthen conceptual relationships about past, present and future. Yet within this perspective related to the migrations of peoples, some young people referred to several contacts between peoples by conquest or by commerce; it would be useful to stimulate the consideration of interactions between the two parties, those who came to conquer or trade, and those who suffered the conquests as victims or those who exchanged products as equals. Study C also reveals possible conceptual relationhips between interculturality (in the line of intercultural humanism expressed by Rüsen), and historical empathy used in history education; it would be challenging to discuss further at the epistemological level these possible relations. Study D suggests that teaching challenges when placed in a balanced and monitored fashion appears to be more productive than when student activities are challenging but are not carefully monitored. It is a relevant result that deserves to be presented, discussed and deepened with teacher's educators and teachers in the field, along with the problem of integrating notions of historical thinking as a cognitive challenge in student's inquiry. It will be a way of reinforcing temporal orientation based on genuine historical questions.

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