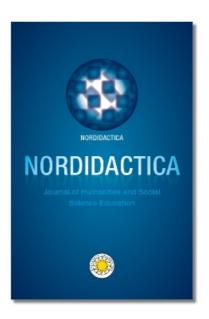
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Students' Understanding of Historical Sources – A Composite Ability

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Abstract: This paper investigates what students need to learn, to be able to interpret and evaluate sources, in relation to specific subject matter addressing Imperialism and Decolonization. The History-didactical framework used stems from the Historical Thinking tradition and the method applied is a textual analysis informed by theoretical assumptions originating from Variation theory. Data is derived from assignments generated in two Learning Studies undertaken in a Swedish upper secondary school. Specific aspects were identified as critical for our students' ability to handle the sources in a composite manner. On a more general level results indicate that the application of source-criticism only in the form of source-critical criteria is not the ideal choice, since their design not necessarily seem to encourage students to interpret and evaluate sources from a composite standpoint. A proposal given is that the development of students' ability to handle historical sources might benefit if Swedish history instruction adopted elements associated with the second order concept of evidence and allowed such practices to complement usage of source-critical criteria.

KEYWORDS: HISTORICAL THINKING, HISTORICAL SOURCES, EVIDENCE, SOURCE-CRITICAL CRITERIA, STUDENT IDEAS, CRITICAL ASPECTS

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Introduction

One important purpose for history education is to develop students' ability to evaluate and interpret historical sources¹. This can be justified from both an individual and societal perspective, since possessing such competences is important to fully participate in society and for upholding a healthy democracy (Barton & Lestvik, 2008; Carvalho & Barca, 2012; Lee, P, 2011; Seixas P., 2000). That the ability is considered important is also underscored in the present syllabus for History in the Swedish upper secondary school, stating that students should "search for, examine, interpret and assess sources using source-critical methods [...]" (2011). The methodological approach is elaborated in the commentary material (2012), stating that sources should be evaluated based on relevance and source-critical criteria², but that a continuous interpretation of content, origin and function also should guide this process. Despite these ambitious aims, traditional school practice in Sweden has been inclined to approach historical sources as context independent method exercises where students are expected to evaluate the reliability of individual sources. These practices are also frequently reflected in textbooks. When source tasks at all are included, it is quite the rule that these exercises refer to reliability, and expect students to evaluate them using source-critical criteria (Rosenlund D., 2015;2,1).

Attempting to understand the reasons why such practices prevail it may be helpful to turn to the discipline of history for answers. Methods to evaluate the reliability of sources has been a focal point since the latter half of the 19th century, as the subject gradually developed into a scientific discipline. Here the German historian Ranke is considered a key individual, through the methods he developed in order to verify the authenticity and reliability of sources (Evans, 1997). Influenced by this German tradition, a source-critical school associated with the Weibull brothers developed in Sweden during the first half of the 20th century. Gradually source-critical criteria were formalized and came to be regarded as fundamental principles for how historians would approach historical sources (Jarrick, 2005). However, the British historian Collingwood argued that true understanding for historical sources also holds an interpretative dimension. Historians must practice reenactment, trying to understand societal contexts and mentalities surrounding the creation of sources. Concurrently uphold an awareness of the implications caused by the temporal distance between themselves and the sources (Collingwood, 2014). Contrary to Ranke, for whom the aim was to approach the past without preconceived notions, Collingwood also stated that it is neither possible nor desirable to avoid being influenced by one's present position in the choice of questions and interpretations (2014).

¹ A wide and somewhat vague term used throughout the paper well aware that it includes sources of very different nature. There is no complete agreement regarding the terminology for different kind of sources, see for example (Lee & Shemilt, 2011; Seixas P., 2015b).

² Traditionally these refer to authenticity (if a source is what it claims to be), concurrency (closeness in time and space regarding the event reported in the source), dependency (whether a statement within a source is dependent on other statements) and tendency (whether a statement is considered to show sign of bias) (Thurén, 2005).

Returning to the educational context, it is fair to say that the evaluative approach has had a profound impact on teaching practices in Sweden during the latter half of the 20th century whereas the interpretative dimension has not received as much attention. Rosenlund, who has investigated Swedish history syllabuses from the 1970s until today, has shown that epistemological attitudes to source work have foremost been based on a Rankean empiricist standpoint. Up until the recent syllabus, sources have usually been attributed with fixed values and source work largely equated with the application of source-critical criteria (2015;2,1). However, findings presented in this paper points in the direction that such approaches not necessarily encourage students to address sources from a composite standpoint. The epistemological point of departure taken is that sources need to be addressed in relation to specific questions and contexts rather than treated as method exercises focused on reliability. Another assumption is that sourcecritical criteria, though obviously important, should be regarded as only one element of what is required to handle sources in a composite manner. The aim for this paper is to contribute with knowledge for how students in upper secondary school tend to understand historical sources. The research question strives to answer what students need to learn to be able to interpret and evaluate sources, this in relation to specific subject matter addressing Imperialism (the Scramble for Africa) and Decolonization (the conflict over minority rule in Rhodesia).

Earlier Research and its Implications for History Instruction

Research for students' understanding of sources has primarily been undertaken within the framework of the Anglo-American Historical Thinking tradition and in relation to the concept of evidence (Ashby, Lee, & Shemilt, 2006; Barton & Lestvik, 2008; Chapman, 2011; Levesque, 2009; VanSledright & Limon, 2006). Academics within this tradition have largely focused their research on second order concepts of which evidence is one example. Such concepts could be equated with disciplinary tools that, independent of chronology and subject matter, allow students the opportunity to phrase questions to the past, apply perspectives and construct history (Ashby, Lee, & Shemilt, 2006; Lee, P, 2011)³. Conceptualized in research, evidence has the potential to address both the evaluative and interpretative dimension of sources. Pioneering extensive research projects⁴, British academics have been able to map students' understanding of evidence and create progression models (Ashby, Lee, & Shemilt, 2006; Lee & Shemilt, 2011). Results show that students with limited understanding of the concept equate sources with information and judge them as either false or true. As their ideas progress, students tend to see that sources might shift in reliability. But it is not until possessing advanced understanding they see that value and limitations largely

³ Examples on such concepts are significance, continuity and change, cause and consequence, historical empathy and evidence (Lee & Ashby, 2000).

⁴ See, "The Schools Council History Project 13-16" (SCHP) founded in the early 70s, later followed by "Concepts of History and Teaching Approaches at Key Stage 2 and 3, 7-14" (CHATA).

depend on the questions asked and that sources need to be interpreted in relation to their context (Lee & Ashby, 2000; Lee & Shemilt, 2011; Shemilt, 1983; Shemilt, 1987)). Ashby (2011) concludes that students need to differentiate between sources and what actually constitutes evidence, what kind of questions that are possible to phrase to various sources and how their nature differ. Similar strategies are advocated by Seixas (1996; 2015a; 2015b), arguing that students need to differentiate between information and evidence, substantiated and unsupported claims, and see that sources comprise of differing perspectives and interpretations. He also points out that students should be allowed to phrase questions concerning the creation of sources, consider surrounding contexts and corroborate claims (2013).

Originating from his expert and novice research, Wineburg (1991; 2001) found that US high school students ignored subtexts, not being aware that such exist, and did not possess any strategies to handle contradictory accounts. They viewed sources as plain information, and did not see the need to interpret them in relation to the surrounding context. He concludes that if students not explicitly are told to pay attention to the fact that people in the past had different beliefs, they are inclined to base their interpretations on personal values. To develop students' understanding he advocates that they should be allowed to practice the heuristics of sourcing, contextualizing and corroboration⁵. Research by Nersäter (2014) and Johansson (2014) shows similarities with findings from the UK and US. Both investigated students' conceptions of historical sources within two groups of Swedish upper secondary students. Independently they found that many participants perceived them as information, showed presentism in their interpretations and had problems discerning subtexts.

In a comparative study including students from three European countries, Carvalho & Barca (2012) investigated students' competencies interpreting historical sources. They found that in their last year of compulsory education, only a few were able to handle evidence at an epistemological level making them able to cope with conflicting accounts. Barton (2001) showed that primary students in Northern Ireland had a greater understanding of evidence than their US counterparts. The likely reason according to Barton is that Northern Irish students frequently encounter various sources while US students predominantly read textbooks depicting a fixed story for their own country's history. This phenomenon has been observed by several US researchers pointing to the linkage between history instruction and the understanding for sources (Barton, 1997; VanSledright B. A., 2002; VanSledright & Kelly, 1998). Their findings show that middle school students, when asked, could draw conclusions about the reliability of sources, understand that sources could vary in reliability and may show bias. Nevertheless, they tend to treat them as equally trustworthy and use information within them uncritically when writing essays. Researchers therefore recommend that students should encounter various sources and that history instruction should avoid presenting

⁵ In brief, sourcing is to perform an external analysis were origin and context surrounding the creation of a source is decoded. Contextualization refers to an internal analysis where the content is interpreted and placed within a context. Lastly, corroboration involves comparison and contrast of claims within a source against other available sources (Wineburg S., 1991).

narratives as given, but instead illustrate how these have been constructed (Barton, 1997; VanSledright & Kelly, 1998).

Research has also found strong connections between the ability to handle sources and the possession of content knowledge. Rosenlund (2016) discovered that students who efficiently applied the heuristics of contextualization and sourcing when creating accounts also were able to construct complex interpretations. Students lacking content knowledge had problems performing valid interpretations, instead using whatever historical content in their possession disregarding the context surrounding the sources. Similar findings have been shown by (Nersäter, 2014) and Pickles (2010), indicating that efficient use of sources requires both context knowledge and an understanding of evidence and historical empathy. The latter since students need to consider the worldviews and mentalities that surround the creation of sources (Endacott, 2014; Lee & Shemilt, 2011; Levesque, 2009).

Methodological and Theoretical framework

The method applied has been a textual analysis informed by theoretical assumptions originating from Variation theory, a theory that views learning as ways of experiencing. It assumes that learning requires a simultaneous discernment of certain necessary aspects regarding phenomena we encounter in our environment, which in turn is made possible by experiencing variation (Marton, 2015). In an educational context such phenomena are labelled as objects of learning. These consist of two elements, a direct and indirect object of learning. The direct refers to a specific subject matter, whereas the latter comprises of the ability that teaching strives to advance.

Every object of learning contains a set of aspects that needs to be discerned for learning to progress in relation to the ability and subject matter. Some of these are critical for students' ability to master the object of learning in the desired manner. Within a group of students, some may have discerned these aspects and some have not. Hence, teachers need to be receptive, how students understand an object of learning and try to identify aspects critical for their understanding. According to the theory, teachers should design learning activities based on patterns of variation that allow students to discern these aspects (Marton, 2015).

The identification of critical aspects cannot be derived at solely from what teachers consider to be the essential characteristics of an ability and related subject matter. Neither can they single-handedly be concluded through an analysis of the misconceptions that students could show in relation to the same ability and subject matter. Critical aspects should be regarded as relational, and they are possible to identify through a combined analysis of the nature of the ability, related subject matter, curricula definitions, teachers' professional experience and the ideas that a specific group of students under investigation could show (Pang & Ki, 2016).

Data and Design

Data has been generated through two Learning Studies (LS)⁶ undertaken in a Swedish upper secondary school. The same three classes consisting of sixteen-year-old students participated in both while studying History 1b, a mandatory course for all university preparatory programs. Data originates from assignments generated in this research and includes a total number of 221 essays7. Research was undertaken in accordance with the ethical guidelines of the Swedish Research Council (2012). Students were informed of its purpose, implementation and the handling of collected data. Participation was voluntary and the students could decide in what manner data related to them were used. Corresponding letters of approval were sent to their guardians. In order to meet requirements of confidentiality, all names have been anonymized during the analysis process. Assignment answers used in the paper have been translated into English by the author. Both LS were designed as source-based units in which students were provided with context material and accompanying sources. LS1 addressed 19th and 20th century Imperialism specifically framed on the scramble for Africa. During this unit students investigated what caused the scramble. Undertaking the assignments, they were also expected to evaluate and use two accompanying sources. Besides causation, this design made it possible to study their ability to handle sources8. LS2 focused a subject matter framed on Decolonization and conflict in Rhodesia. Again the unit addressed an overarching historical question - causes leading to the downfall of white minority rule in Rhodesia. In the assignments, students were asked to interpret and evaluate two sources, assessing their value and limitations for the historian who investigates the Decolonization process in Rhodesia. Accordingly, this paper presents the combined findings from these assignments concerning what characterizes qualitatively different ways to interpret and evaluate sources. This in relation to a subject matter focused on the scramble for Africa and Decolonization and conflict in Rhodesia.

Analytical premises

The identification of critical aspects stems from the analysis of assignment data and have also been informed by earlier research findings regarding students understanding of sources⁹. Analysis began with several readings of the assignment answers. From this, three major themes gradually appeared:

⁶ LS is an iterative and collaborative method for the analysis and enhancement of teaching and learning (Marton, 2015)

⁷ Students wrote one pre- and one post assignment in each LS but due to the character of the preassignment question in LS1 only post-assignments have been used from this LS.

⁸ Findings from LS1 have been published in a research report focused on students' ability to construct historical explanations (Nersäter, 2014).

⁹ See earlier research.

- The way students addressed value and limitations of the sources in relation to the historical question
- How they interpreted the sources
- Their treatment of methodological criteria regarding source-evaluation

After further analysis these initial themes were themselves coded into subcategories according to the similarities and differences student responses showed. Textual segments showing similar ideas regarding the subcategories were highlighted and sorted together. During this process the assignment answers were reread several times to ensure that identified themes and subcategories were consistent with data. An example of how the coding process was undertaken showing connections between themes, subcategories and qualitative similarities/differences is illustrated in the matrix below. This particular example refers to students' usage of methodological criteria:

TABLE 1

Matrix illustrating the coding process

Theme: Treatment of	Qualitative similarities and differences regarding discerned aspects - Excerpt examples	
methodological criteria regarding source- evaluation	Excerpt 1. "Source 2 is probably useful and true since the statement is contemporary with	Excerpt 3. "Source 2 is a primary source and contemporary, but it is hard to know if it only conveys facts [] he has decided to only show the
Subcategory: Concurrency and dependency in relation to the perceived trustworthiness of sources	events." Excerpt 2. "Source 1 is very reliable [] the soldier has personally experienced what he is writing about."	perspective of a freedom-fighter []" Excerpt 4. "Source 1 is concurrent and not dependent on other sources [] a limitation for its use is the propagandistic content shown in the value laden words []"

Critical aspects were identified through an analysis of qualitative similarities and differences regarding discerned aspects within the themes and subcategories of data. The example excerpts in the matrix illustrate this process. Excerpt 1 and 2 were coded together as they illustrate qualitative similarities regarding the idea that fulfilment of source-critical criteria (in this case concurrency and dependency) is enough to deem sources reliable and useful. Excerpt 3 and 4 were coded together since they share the notion that completion of such criteria is not in itself a sufficient requirement. Hence, there is a qualitative difference between the two pairs. In excerpt 3 and 4, students have discerned the need to treat such criteria in a relational manner. They see that even though

the criteria appears to be fulfilled, this is not sufficient proof to judge them reliable and useful as they show strong bias (source 1), respectively give a one sided perspective (source 2). This is not yet discerned in excerpt 1 and 2.

That research has been informed by specific theoretical assumptions and data originate from assignments created in the context of two LS, in which the researcher cooperated closely with teachers, could be regarded both as a strength and a weakness. A weakness, since it might be difficult to distance oneself from a process were one is an active participant. A strength, as participation in the process can contribute to a deeper understanding of the difficulties students encountered when handling the sources. The risk of being too closely connected to data has been handled by the application of repeated analysis. First, assignments were analyzed during the implementation of LS. A second analysis of student understanding for sources was undertaken writing the research report (2014). Lastly, and most important, a thorough reanalysis of the LS assignments were undertaken writing this paper. Regarding choice of method and theory, I would argue that these choices have not steered the outcome of research in a manner not consistent with data. An argument supporting this is that results in some respects show similarities with earlier findings originating from other research environments applying different approaches.

Another question is to what extent these results are possible to generalize to source work associated with other subject matter. A reasonable hypothesis is that since several aspects deemed as critical are of rather generic nature, they would be necessary to discern regardless of the chosen subject matter. The fact that other researchers have identified similar problems connected to some aspects, this in relation to different subject matter, strengthens that argument.

The identified aspects presented in the next section stem from both LS and will be presented together. Considering demands of transparency, rich excerpt examples with accompanying analysis will be accounted for in relation to every identified critical aspect. All sources from the assignments referred to in the excerpts are included in the appendix. The overall ambition is to clarify on what basis critical aspects have been identified and to serve as foundation for what conclusions that might be drawn.

Results

Based on the analysis of the assignment answers the aspects, as presented in the diagram below, were concluded as critical for our students' ability to interpret and evaluate sources with high quality in relation to the historical context and question. In the following section the character of these aspects will be elaborated through student excerpts and accompanying analysis:

TABLE 2

Identified critical aspects

C.A	Identified critical aspects	
1	Discern the need to contextualize and evaluate sources rather than treating them as neutral information.	
2	Discern the need to alter temporal and contextual perspective to avoid presentism and literal interpretations.	
3	Discern the need to uphold an evaluative approach while still doing empathetic interpretations.	
4	Discern the need to use source-critical methods in a relational manner rather than treating them mechanically: a) Discern that the fulfilment of source-critical criteria like	
	concurrency and dependency not necessarily makes a source trustworthy.	
	b) Discern that the specific origin of a source not necessarily makes it trustworthy.	
	c) Discern that primary sources not necessarily are more trustworthy than secondary sources	
	d) Discern the difference between authentic sources and reliable claims	
5	Discern that the value and limitations of sources change depending on the historical questions we phrase.	
6	Discern the need to compare and contrast sources to validate claims and show different perspectives.	

C.A.1. Discern the need to contextualize and evaluate sources rather than treating them as neutral information

Literal interpretations lacking in contextualization appeared rather frequent in the data. The first excerpt illustrating this phenomena stem from the assignment answers in LS2. In these, students were asked to interpret and evaluate two sources, assessing their

value and limitations for the historian who investigates the decolonization process in Rhodesia. The first excerpt refers to an account from Lt. Gen. Peter Walls', commander of Rhodesia's commando troops, arguing for the just cause in their struggle against the African Nationalist movements¹⁰ (Appendix, source 3):

Source 1 shows that many soldiers fought for the whole population. It also demonstrates that the army fought for the rights of everybody. He [Lt. Gen. Walls', my comment] thinks that the country is unique which also makes it stronger. He states that everybody have to work together and help each other to succeed.

We see that the testimony is taken for granted in the sense that this student accepts the trustworthiness of Walls' statement arguing that the commando troops "fought for the rights of everybody". There is no attempt to contextualize the testimony in relation to the nature of this conflict, or evaluate his statement from a critical standpoint, hence identifying a bias based on Walls' position as a high ranking military representing the regime. The next two excerpts are derived from LS1. The first represents the same phenomenon as we have seen above. The second is an example where a student has discerned the critical aspect. During these assignments, students were asked to evaluate and use two sources in an explanation for the causes behind the scramble for Africa. The source in question is an extract from a speech held by the British Colonial Secretary Joseph Chamberlain to the British Colonial Society in 1897 (Appendix, source 1). In the speech he argues for why the British must engage themselves in the colonization of Africa:

Joseph Chamberlain's speech is about how to stop the injustices that have emerged against black people. How they [the British, my comment] will wage war to stop slavery among the indigenous Africans.

This is yet another interpretation that has to be considered as both literal and uncritical in the sense that Chamberlain's underlying motives are not questioned. Instead the assumption is that what he says is what he really means. The next excerpt, an interpretation of the same source, is an example of a typical approach from students who have discerned the critical aspect:

He [Chamberlain, my comment] describes the successes this to convince the audience and get them on his side, it is extra important since the speech is held to influential people. It is important that Imperialism is seen as positive in Britain. He says it is their national duty but this is only a means to convince the public of its necessity. For them, it was really a source of power, an economic source to raw materials and supremacy [...]. This source is useful to understand the thinking during the scramble. At least among those who benefitted from Imperialism and the scramble for Africa.

¹⁰ Zimbabwe African National Union (ZANU) and Zimbabwe African People's Union (ZAPU), two militant organizations waging a guerilla war against the Rhodesian regime from the mid-1960s until the signing of the Lancaster agreement December 1979.

This student has identified a potentially hidden agenda in the speech arguing that it was "only a means to convince the audience". We see how it is interpreted in relation to the context prevailing at the time when the student claims that colonial possessions were "an economic source to raw materials and supremacy". This operation requires access to contextual knowledge and an ability to use it. Secondly, identifying potential bias as this student do, involves an ability to read between the lines, discern value-laden words but also paying attention to what a speaker may omit from his argumentation. Overall, this points in the direction that a successful evaluation of these sources requires both an extent of contextual knowledge as well as an ability to discern subtexts.

C.A.2. Discern the need to alter temporal and contextual perspective to avoid presentism and literal interpretations

The second source from the assignments in LS1 (evaluate and use sources when explaining the causes behind the scramble for Africa), was a photo illustrating native Africans doing labour on a Rhodesian farm (Appendix, source 2). The excerpts below show that even though most students discerned the need to interpret the photo from a critical standpoint, they still failed to display valid interpretations:

The likelihood that it would be the British who have taken the photo is not great. They did not want to show that they kept the population there as workers/slaves. Rather, I believe the photo is taken by a worker who might try to get other people to react.

That the photographer is unknown could be because he is white and is afraid of negative reactions if the photo becomes public in media.

These excerpts could be considered to show presentism since they indicate that the students only apply their contemporary perspective interpreting a past context. From a present-day perspective one could argue that they made a sound interpretation. If we engage in a thought-experiment and imagine a contemporary photo taken by an unknown photographer, and assume that it shows the existence of poor working conditions in a factory owned by a western multinational-company, located somewhere in the Third World. From such a contemporary perspective their interpretations would be perfectly reasonable. The difficulty interpreting this specific photo is that they have to interpret a past context. One where the photographer most likely was a white person, not a native worker, who for some reason wanted to document work undertaken at the farm. Based on the mentalities frequent during the Age of Imperialism it is not likely that the photographer was concerned about any hostile reactions if it became public. A likely reason for the presentism shown in the excerpts is that these students became too dependent on their contemporary understanding since they either lacked enough context-knowledge, or failed to use it. Another excerpt, probably springing from the same kind of difficulties, illustrates how the purpose behind the creation of a source might be misunderstood:

The purpose with the picture is to show how black people had to work while the white had the power.

This may well be the purpose if someone, out of specific interest, uses this photo during another time period and in another context. However, it was most likely not the purpose behind why it originally was taken. Considering the societal structure and mentalities during this period, the photographer probably did not consider the situation as unjust. The excerpt also indicates that this student either finds it hard to distance himself from a contemporary perspective, or is not aware of the necessity to do so. The end result is the same, the interpretation will originate from personal values, rather than taking into account the mentalities existing among many Europeans during the Age of Imperialism. This contrary to students who discerned the need to take into account the context and mentalities prevalent at the time in their interpretations of the photo:

A purpose behind the creation of this photo might have been to show how the colonial rulers created job opportunities for black workers, simultaneously demonstrating that it was the black man's rightful place to work for the Europeans. The photographer might also want to show people back home in Europe how life in the colonies was. It would have been beneficial to know more about the circumstances surrounding the creation of the photo since we can't say for sure if the workers are slave-labourers or just low paid workers.

Conclusively, in regard to this aspect, analysis showed that students, to avoid presentism and literal interpretations, have to be made aware of the need to shift temporal perspective adjusting it to the time and context at stake. Finally, they also need to be offered enough contextual knowledge regarding the sources at hand to do this in a qualitative manner.

C.A.3. Discern the need to uphold an evaluative approach while still doing empathetic interpretations

Assignment answers from LS1 showed examples of a lack of historical empathy when students in some cases (as shown above), interpreted sources from a present-day perspective and therefore drew invalid conclusions. Assignment answers from LS2 on the contrary, revealed examples where empathy instead turned into sympathy and interpretations for that reason risked ending up faulty. The excerpts demonstrating this relate to a source from LS2. It is an extract from "Rhodesia an African Tragedy" written by a journalist traveling through Rhodesia in 1967 (Appendix, source 4). Student excerpts refer to an interview with Lazarus Makoni, an African who has just been released after imprisonment:

I think that Lazarus who was interviewed can be trusted.

I don't think that Lazarus has made up the story.

Lazarus tells, according to me, in a very trustworthy manner how life in prison was.

Source 2 is objective and originates from someone who has experienced the terror.

I think source 2 is valuable since Ringberg is neutral. It doesn't say so much about decolonization but depicts how it was for ZAPU and ZANU. One doesn't know the extent of truth told by Lazarus but I don't think that he would lie.

Such views regarding the trustworthiness of the account from ZAPU-sympathizer Lazarus Makoni are rather common in the data. When evaluating content and language in this source, it has to be considered emotional in regard to content and language. In the article, Makoni describes the primitive conditions he experienced in a Rhodesian prison and the consequences of his imprisonment. Simultaneously, looking at the perspective of the journalist and his choice of value-laden words 11, it is evident that he sympathizes with Makoni and in the just cause of the guerrilla movement. After having performed an evaluation, it is of course plausible to reach the conclusion that Makoni's statement is altogether correct. However, it is equally evident looking at these excerpts that many students had no inclination to apply such an evaluation in relation to his statement, nor to question the stance taken by the journalist. Analyzing the next excerpt we see how students who discerned this aspect went about to apply historical empathy but still uphold a critical attitude:

Ringberg's purpose was to report home about events in Rhodesia. In the sense that he is a foreigner, he could be considered as objective, however, looking at the way he writes and the things he chooses to address, Makoni's time in prison... we can see a slight bias, in his factual selection it is clear that he sympathizes with the Africans. If we want an overall picture of the situation, the value of this source decreases somewhat. The source is however very valuable if we would like to know how the outside world viewed the situation in Rhodesia.

Studying the excerpt, we see that this student has discerned the need, and has the ability to consider the historical situation while still undertaking a critical evaluation of the journalist's story by stating that "we can see a slight bias, in his factual selection it is clear that he sympathizes with the Africans". Many failed to uphold this approach, and the next excerpt might give us a clue why this was the case:

Source 2 is valuable since it shows how evil and mean the white minority in Rhodesia was. First, they (Lazarus and his friends, my comment) only discussed possible changes and probably didn't feel any large hostility towards the white minority. However, if one gets a sentence of 30 months in prison it is not surprising that you feel a strong hatred and want to change everything.

Implementing the unit, it became evident that the subject matter, a narrative depicting a suppressed majority-population demanding equal political rights, opposed by an elite possessing political and economic power, aroused emotional commitment and sympathy among our students. This may be the reason why many students were unable or reluctant to interpret some of the sources applying historical empathy and simultaneously uphold a critical approach. The nature of this narrative might have

¹¹ See source 4 in the appendix.

overshadowed their inclination to uphold such an attitude which instead turned into sympathy.

C.A.4. Discern the need to use source-critical methods in a relational manner rather than treating them mechanically

This aspect proved to consist of several interdependent elements. These include both an understanding for the relational and interdependent nature of traditional sourcecritical criteria but also elements related to the origin of sources and their perceived trustworthiness:

a. Discern that the fulfilment of source-critical criteria like concurrency and dependency not necessarily makes a source trustworthy

In some cases, students who had discerned the need to assess value and limitations of sources from a critical standpoint still ended up in difficulties. To some extent this might be related to a lack of contextual understanding, but often difficulties seemed to arise in relation to their methodological ideas concerning different dimensions for what could make sources trustworthy. The excerpts analyzed below all stem from LS2:

It is useful since he who has written source 1 [Lt. Gen. Walls', my comment] took part in the war and has seen it with his own eyes. Therefore it is useful when he explains how the war should be won to secure peace.

Source 1 [Lt. Gen. Walls', my comment] is pretty reliable since it originates from the time these events took place.

Source 2 [The interview with Lazarus Makoni, my comment] is probably useful and true since the statement is contemporary with events.

Source 2 [The interview with Lazarus Makoni, my comment] is contemporary and also published which makes it rather trustworthy, it is an interview with a freedom-fighter.

Normally there is not a problem to use dependency and concurrency in an evaluation of reliability as these students do, but doing that in isolation or in a static manner becomes problematic. This since the nature of the two sources, combined with the context and question at stake, puts the criteria of bias in the forefront. The end result is that even though a proper evaluation of concurrency and dependency might have been undertaken, the evaluation of trustworthiness and value of these sources are still inadequate. This since the criteria has not been treated in a relational manner where consideration has been taken to the historical question and context, which in a plausible evaluation should allow the criteria of bias to overshadow the others. The next excerpt is from a student who *has* discerned that the internal importance of each criteria shifts depending on the question and also is influenced by the context that surrounds the source:

Source 2 is a primary source and contemporary, but it is hard to know if it only conveys facts. We do not know if Ringberg has interviewed other

individuals as well, but he has decided to only show the perspective of a freedom-fighter. He does not give the full story for why the police arrested Lazarus, and maybe Lazarus took the opportunity to exaggerate the story for political reasons. This to make more people sympathize with his struggle hoping for a change. I also think that it seems like Ringberg supports Lazarus since he writes about emotional facts which I think most people are affected by.

Here we could argue that the criteria is treated in a relational manner. Indeed, there are remarks made on dependency and concurrency, but wisely, this student puts most emphasis on the possible bias of the source stating among other things that "He does not give the full story". There are also remarks made on the perspective and an identification of bias regarding content and language when the student comments that "he writes about emotional facts".

b. Discern that the specific origin of a source not necessarily makes it trustworthy

Possessing developed understanding for historical sources, one knows that origin in itself is not a sufficient criterion to judge the credibility of a source. However, analyzing the excerpts below, we see that students sometimes rely too much on origin when judging the trustworthiness and value of sources:

Source 1 could be valuable since they tell what they are willing to do to decolonize Rhodesia. This is also told by a soldier which makes it more reliable compared to if a journalist had written it $\lceil ... \rceil$.

Firstly, this excerpt demonstrates an evident lack of contextual understanding, since it is believed that Walls' wants to "decolonize Rhodesia". Secondly, we could also see that the specific origin of the source is considered enough to make it trustworthy since it is "told by a soldier which makes it more reliable". Besides the perceived credibility of Lt. Gen. Walls', there are other examples that demonstrate this static approach in regard to origin. Some argue sources to be trustworthy since they emanate from a military journal, a Swedish newspaper with a good reputation, or are written by a journalist:

Since source 2 is an interview done by Ringberg, it is neutral and not written from a specific perspective [...].

Both sources feels pretty secure due to their origin, a journal and an article from a journalist. The first source is reliable since it is written by a Lieutenant-general from Rhodesia.

Source 2 is an extract from Dagens Nyheter [A well-renown Swedish newspaper, my comment] and since it is an interview one can assume that Lazarus is telling the truth.

In these and several other examples demonstrating problematic ideas regarding origin in relation to reliability, it is not possible to connect it to any visible lack of contextual understanding. Analyzing the next excerpt however, we find that even though an evaluation of origin in combination with the criteria of concurrency and dependency has been undertaken, the evaluation could still be considered as rather

literal and naïve. This since the importance of evaluating the source for possible bias is not discerned:

Source 1 is very reliable since it's written by a soldier. The things that are written are contemporary and the soldier has personally experienced what he is writing about. It's valuable for historians to see how a soldier viewed the situation. The source is valuable if you want to see how they wanted to have peace in the country and equality between black and white people. This source is also not dependent on any other source.

At first glance this excerpt could indicate mastery of source-critical criteria, however a closer examination shows lacking ability to treat the criteria in a relational manner. If students hold mechanical ideas regarding their use, it is not surprising that they consider a contemporary first-hand account as credible in itself. If they however possess a relational understanding of source-critical methodology, they are likely to see that evaluating source 1 from LS2 in relation to the context and question at stake, causes the criteria of bias to completely outweigh the criteria of concurrency and dependency. The next excerpt illustrates such a relational treatment interacting with contextual understanding:

The origin is a military journal from the late 70's and it is contemporary with the guerrilla wars in Rhodesia. Walls', who is the commander of the commando-troops argues with the purpose to raise support among the white minority within Rhodesia against the independence-movements from ZAPU and ZANU. This source is very biased, it shows one perspective; a white officer who is strongly against the independence-movements. One could also see the bias of Walls' in the value-laded words he uses against the Africans, "villains", "destructive forces", etc.

This student has defined the origin of the source and concluded that it is contemporary with events, but based on Walls' purpose and choice of words, the student chooses to emphasize its bias.

For some of the excerpts presented above it is possible that a lack of contextual understanding has contributed to shape the nature of the ideas. This making it harder for students to discern that Walls' has a specific interest in safeguarding the continuation of white minority rule. However, if this is the case, it just strengthens the importance of possessing enough contextual knowledge to be able to interpret and evaluate sources in a composite manner.

c. Discern that primary sources not necessarily are more trustworthy than secondary sources

As shown above, there are many examples where students consider the specific origin of a source to equate trustworthiness. In some cases these views are specifically related to the opinion that primary sources always hold sway over secondary ones:

Source 2 is a secondary account and therefore not as reliable as Source 1. The author, Åke Ringberg might have exaggerated certain events to attract readers. One could also ask oneself what Lazarus did against his country. He

was arrested and had to sit in jail for 30 months – and Åke regards him as a freedom fighter? [...].

This is yet another example of a static attitude to methodology and where students do not see the need to take the context and question into consideration evaluating the trustworthiness of sources. In addition, this excerpt illustrates an obvious lack of contextual understanding, but it is not apparent that it has affected the students view regarding the trustworthiness of the source. Having discerned the need for a relational approach to the criteria students might argue that:

Source 2 is a primary source and contemporary, but it is hard to know if it only conveys facts [...]

Analyzing this excerpt, we see that neither origin nor concurrency in isolation is considered as sufficient in themselves to judge the trustworthiness of the source.

d. Discern the difference between authentic sources and reliable claims

Assignment answers during LS2 showed that some students had difficulties to see the difference between the criteria of authenticity and whether a source, based on the outcome of a source critical evaluation, is reliable or not. Investigating authenticity relates to the external evaluation of a source, checking if the origin is what it claims to be in relation to the historical context and time-period (Levesque, 2009). Analyzing the excerpts below, it is obvious that these students instead are of the opinion that authenticity equals reliability:

Source 2 [The interview with Lazarus Makoni, my comment] is pretty authentic since he retells what he has experienced and I don't think that he would lie [...].

Source 1 [Lt. Gen. Walls', my comment] is very authentic since it's written during the time these events took place $\lceil ... \rceil$.

We see that these students view the sources as trustworthy since they are considered first-hand accounts and moreover have a closeness in time. What these excerpts have in common is that students confuse the fulfillment of authenticity with reliable claims.

C.A.5. Discern that the value and limitations of sources change depending on the historical questions we phrase

Analysis showed that many students considered that the value and limitations of sources predominantly depend on the extent of information they can provide and that their usefulness is something static:

I wouldn't say that the source [source 1, LS2, my comment] is particularly useful since it doesn't depict any events, instead it encourages a continuation of the war. It isn't so valuable to know how they tried to motivate people.

This source [source 2, LS2, my comment] is more valuable since you get so much information concerning how it was to be imprisoned during this time. There are not many other sources that addresses that. One also gets a lot of

information on how unfairly black people were treated and how poorly the economy and democracy in the country worked.

Related to this is the idea that sources should be dismissed if they are considered to show bias. Students did not see that such sources can be very valuable and depend on which questions we seek an answer to:

You can't use source 1 **[LS2, my comment]** so much since it gives a very biased and naïve view on the conflict. It shows what everyone wanted to see and hear but it is not so relevant since it is all made up.

In source 1 **[LS2, my comment]** Walls' make it look as black people are the bad guys. The source is not especially useful since it is a very glorified and biased viewpoint regarding the conflict.

These examples highlight the importance of emphasizing the relational nature that exists between sources, surrounding contexts and the questions we seek an answer to. The excerpt below is an example where this aspect *is* discerned:

Walls' want to convey his views on the war. Obviously he wants to depict it as he and the army fought on behalf for everybody to "win the peace in Rhodesia". He is very biased and strongly against the independence-movements. This means that we can't take his word for that the situation was as he describes. We need to have some background information. He labels ZANU and ZAPU as "villains" despite that it was actually they who fought for what we now consider as just. However, the source is still valuable if we want to describe how the white regime viewed the situation.

From the excerpt we can conclude that students need to be made aware that the usefulness of sources is not a fixed attribute. That their value and limitations change depending on the surrounding context and the questions we phrase. They also need to discern, as this student do, that a biased source could be very valuable and that this ultimately depends on what evidence we are looking for and on what kind of questions we phrase.

C.A.6. Discern the need to compare and contrast sources to validate claims and show different perspectives

Comparison and contrast of sources have to be considered an essential element of the ability to treat sources in a composite manner. Analysis of data proved this practice to be rather uncommon, but in the excerpts below we see examples were this aspect is discerned. In the first, originating from source 2 in LS2, we see how a student has made use of several sources to address what I label as the evaluative dimension of comparison and contrast:

It is probably a tactical move to start by depicting the bad conditions within the prison since it could arouse compassion and the purpose is likely to get the reader on `their` side against the white minority. It is possible that the bad conditions within the prison could be slightly exaggerated but since I have read several other sources about the situation I'm quite sure that this source is rather reliable.

We see how this student makes use of background knowledge originating from other sources to corroborate the credibility of source 2. This evaluative part of source-critical methodology is important, since usage of comparison and contrast, arguing for a claim, opens the possibility to corroborate individual sources used in the process (Wineburg S., 1991; 2001). Obviously, the inclusion of several sources in an argumentation can also strengthen the overall evidential base. A final excerpt relates to what I consider to be the more interpretive reason why sources should be compared and contrasted. In the answer this student has already stated that she considers both source 1 and 2 from LS2 to show a bias, but still considers them potentially valuable depending on what you want to know:

These sources can complement each other since they both deal with the judicial system in Rhodesia, police, courts, the military etc. They give different perspectives and show the situation from both sides.

From the excerpt we can conclude that this student has discerned the need to address the interpretive dimension of comparison and contrast. Thereby she allows the question to be investigated from several perspectives and opens the possibility to show a richer and maybe more genuine picture of the past.

To Evaluate and Interpret Sources - A Composite Ability

Analysis of assignment answers revealed that many students did not **discern the need to contextualize and evaluate sources (C.A.1)**. Instead they viewed them as simple information that, without caution, could be used as evidence. This crucial aspect comprising of two parts has been identified by many researchers (see for example Nersäter, 2014; Ashby, Lee, & Shemilt, 2006; Johansson, 2014; Wineburg S, 1991, 2001). This implies that the first step developing students' understanding is to make them aware of the difference between sources as information and sources as evidence (Seixas P., 2015a). Having discerned this basic necessity, the next involves actually being able to practice this approach in relation to sources. Analysis showed that students to manage this need to encompass a certain amount of contextual knowledge. A clear indication that this is the case is that it was much more frequent with faulty and literal interpretations among students who demonstrated limited contextual knowledge. For history instruction this implies that students should be offered some sort of introductory material to be able to do contextualized interpretations undertaking source tasks.

The second element, being able to evaluate, also partly relates to context. This since students must be able to identify subtexts (Wineburg S., 1991; 2001). Many students failed to discern hidden agendas when actors expressed their opinions; instead they interpreted sources literally. One likely reason explaining this is that they lacked enough contextual knowledge to discern subtexts in relation to the intentions and actions of actors. In addition to contextual knowledge, students need to be able to discern value-laden words and what is not directly outspoken in an argumentation. This evaluative element hence also relates to the criteria of bias (see **C.A.4** below).

Some students did not discern the need to alter their temporal and contextual perspective in accordance with the context and time period (C.A2). Assignment answers from LS1 revealed that their interpretations sometimes could be considered as reasonable from a present day perspective, however not in relation to the societal context surrounding the scramble. Interpreting historical sources usually requires a shift in temporal perspective. Instead some upheld ideas leading to presentism and literal interpretations. These difficulties may relate to a lack of understanding for historical empathy manifested by the inability to leave one's contemporary understanding (Lee & Ashby, 2000; Lee & Shemilt, 2011; Wineburg S. S., 2001). Results indicate that a first step for history instruction should be to make students aware of the need to adapt this approach. The second involves students actually being able to uphold and maintain this trying to understand the mentalities characterizing the time and context from where the sources originate. Admittedly, interpreting past events, we always take our departure in a contemporary understanding, but possessing an interpretive competence should include a conscious effort to distance oneself from such an understanding. The difference between students possessing limited content knowledge, compared to those who had access to more, indicates that applying this approach in a qualitative manner requires a certain extent of contextual understanding, something supported also by other findings (Rosenlund D., 2016; Pickles, 2010).

The need to uphold an evaluative approach while still doing empathetic interpretations (C.A.3) was also identified as critical. This since some students, instead of practicing historical empathy, demonstrated sympathy with actors present in the sources. When practicing historical empathy it is necessary to simultaneously uphold an evaluative approach regarding the perspectives and intentions that these actors could convey (Endacott, 2014; Lee & Shemilt, 2011). Some students failed to do this when they felt sympathy with the actors. A conclusion that could be drawn, is that when the subject matter and sources address sensitive and emotional issues, it becomes extra important for teachers to emphasize the need to uphold an empathetic but still critical approach interpreting sources.

Analysis of assignment answers from LS2 showed that many students did not discern the need to use source-critical methods in a relational manner, but instead treated methodology rather mechanically (C.A.4). Although many used source critical-criteria, the end result of their evaluations did not always turn out as plausible. They upheld the notion that if sources seem to fulfill the criteria of concurrency and dependency, they are reliable and thus suitable to use without caution. Similar problems surfaced regarding origin and primary sources. In these cases the specific origin, or a perceived first-hand account, was in itself considered sufficient for the source to be considered reliable 12. No matter if these responses addressed concurrency, dependency,

¹² Authenticity was not focused in LS1 and LS2, partly due to the nature of the sources which had been chosen by the researcher and participating teachers. Still, many students addressed this criteria and in some cases misunderstood its nature and considered authenticity to equate a reliable claim.

firsthand accounts or origin, they all had one thing in common. These students did not discern that the question and surrounding context made the criteria of bias to completely override other criteria in a plausible evaluation regarding their reliability. Thus, we can conclude that students need to see that the internal importance of various source-critical criteria might shift, and that the sheer origin of a source is not in itself a sufficient criterion to judge its reliability. Differently phrased, understanding of source-critical methods requires of students to see the necessity to treat source-critical criteria in a relational manner.

The findings above are strongly linked to another aspect deemed critical, which is the need to discern that the value and limitations of sources change depending on the historical questions we phrase (C.A.5). Analysis showed that many students considered the value and limitations of sources to predominantly depend on the extent of information they can provide. Also that their usefulness is something static and that biased sources should be rejected. From that we could conclude that students need to be made aware of the relational nature that exists between sources, surrounding contexts and historical questions. Few students discerned the need to compare and contrast sources to validate claims and show different perspectives (C.A.6). This has been emphasized by several academics in relation to evidence. However, this is in relation to evaluation, being able to corroborate conflicting accounts (Seixas & Morton, 2013; Wineburg S. S., 2001). It is worth stating that it also holds an interpretive dimension, being able to see and present different perspectives. This aspect should not be neglected with the argument that it is to disciplinary and hence only a concern for professional historians. Both from the standpoint of history education and from a societal perspective, it has to be considered an important competence to be able to compare and contrast conflicting messages (Carvalho & Barca, 2012). For history instruction, this suggests that students should be allowed to work with multiple sources in relation to specific questions, rather than practicing source-critical criteria in context independent method exercises.

Conclusions and a possible way forward

These results contribute with knowledge of what students need to learn to be able to handle sources both in terms of an evaluative and interpretative dimension. Several identified aspects have been discussed in earlier research. However, these findings have often investigated specific elements, such as students' understanding for epistemology or their ideas in relation to reliability, ¹³ while the ambition here has been to explore what they need to learn from a broader perspective. Previous findings close to these results are the progression models for evidence originating from the SCHP and CHATA projects (Ashby, Lee, & Shemilt, 2006). A difference between the aspects identified here compared to the British models is that the latter illustrate how students' understanding tend to evolve, but they are not specifically focused on instruction. This

¹³ See section, Earlier Research.

in contrast to the nature of the critical aspects, whose character could make them easier to use as a prospective basis for the design of teaching.

Results also contribute with knowledge for how the two dimensions (evaluation and interpretation) are mutually dependent. As stated before, our students demonstrated difficulties in relation to their usage of source-critical methods, (CA4), an aspect closely related to source-criticism. These difficulties very likely stem from the fact that the ability to handle historical sources is composite in nature. Here sole usage of sourcecritical criteria proved to be an insufficient tool to fully address both dimensions. There are several probable reasons for this. The first most likely relates to the fact that a critical evaluation of a source always holds an interpretative element. This in turn requires students to possess some contextual knowledge and a disposition to apply historical empathy (C.A 1, 2, 3). Secondly, results indicate that applying source-criticism only in the shape of these criteria is not the ideal choice, since their character not necessarily encourage students to evaluate sources from such a composite standpoint. Results rather indicate that their evaluative process often came to a halt after they had assessed the reliability of the source as such. Usage of the criteria did not necessarily take them further conducting an overall evaluation, one where sources are assessed regarding their degree of usefulness in relation to a question and a surrounding context (C.A 5, 6). Students who managed this addressed both the interpretive and evaluative dimension and went beyond the criteria (C.A 4). They asked questions related to the context surrounding the creation of the sources, the likely purpose behind a certain statement, and also reflected on conceivable perspectives that could appear in them.

Overall, results indicate that the development of students' ability to handle historical sources might benefit if Swedish history instruction adopted elements associated with the second order concept evidence and allowed such practices to supplement traditional source-criticism in Swedish classrooms. A possible way forward in regard to instruction might be to complement source-critical criteria with interpretive tools. These could be in the shape of instructive questions that support students in the process of contextualizing sources and the application of historical empathy. They could for example request students to consider the origin, purpose and perspectives of sources, before they are asked to perform an overall assessment concerning their value and limitations in relation to specified historical questions.

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Appendix. Sources used in the excerpts

Source 1: Derived from assignments LS1. Extract from "The True Conception of Empire" a speech held by Joseph Chamberlain, Colonial Minister of the Conservative Party, at the annual dinner of the Royal British Colonial Society the 31th of March 1897.

"In carrying out this work of civilization, we are fulfilling what I believe to be our national mission [...] No doubt, in the first instance when these conquests have been made, there has been bloodshed, there has been loss of life among the native population, loss of still more precious lives among those who has been sent out to bring these countries into some kind of civilized order, but it has to be remembered that this is the condition of the mission we have to fulfill [...]

You cannot have omelets without breaking eggs; You cannot destroy the practices of barbarism, of slavery, of superstition which for centuries have desolated the interior of Africa without the use of force; but if you fairly contrast the gains to humanity which we are bound to pay for it, I think you may well rejoice in the result of such expeditions as those which have been recently conducted with such success in Nyasaland, Ashanti, Nenin and Nupe (regions in the interior of Africa) [...]".

Source 2: Derived from assignments LS1. Native workers harvesting tobacco on a plantation in Rhodesia. Taken by unknown photographer sometime during the period 1890 to 1925.



Source 3: Derived from assignments LS2. Extract from "The South African Rhodesian" a military journal from the late 70's, in the journal General Lieutenant Peter Walls', commander of Rhodesia's commando troops (military Special Forces) argue for why the struggle against ZAPU and ZANU (African Independence Movements) must continue.

"We are fighting to protect innocent and sensible people of all races [...]. We protect the lives and rights of the majority from the illegal and terribly cruel terrorist practices that the villains out of their selfish interests threaten them with. As a soldier, I have one overall motive - not just winning the war, but winning peace in Rhodesia. Rhodesia is not like any other country. We have a unique way of life, unique resources and I think, a unique determination to withstand the destructive forces that are against us - I think our determination is stronger than in those countries that already succumbed to the communist threat. If we trust in God and ourselves, and mobilize even more of our ability, strength and determination, and above all stick together, we can never be defeated."

Source 4: Derived from assignments LS2. Extract from "Rhodesia African Tragedy" a reportage- book written by foreign correspondent Åke Ringberg, representing "Dagens Nyheter", who traveled through Rhodesia in 1967. The source depicts his interview with Lazarus Makoni, an African who has just been released after imprisonment.

"I came out of prison a couple of weeks ago. I spent two and a half years in a cell in Gwelo. Seven months I was sitting in a single cell. The floor was ice cold and the Walls' were hot. The cell measured four feet (1.2 meters) in square. I could not sleep stretched out properly on the floor. When I got out of prison I was examined by a doctor, I had lost 15 kg in weight"

Ringberg describes the background to why Lazarus ended up in prison: One night, Lazarus sat with some others in a room in Highfield and talked about what to do to make a change happen in Rhodesia. They had barely dissolved the meeting until the police arrived and arrested them one by one in their homes -all but one! For within the group there was a police informer. When Lazarus eventually was released from his 30 month prison sentence he was not quite the same man as before. When you met his eyes, it is not a dreamer's eyes but a freedom-fighter; a phrase that may appear pathetic but there is no better way to put it.

"We are all ZAPU said Lazarus and made a gesture with the hand over Highfield where children without clothes and shoes were playing in the dusty dikes."

Ringberg continues: Lazarus meant that all Africans, at least all who he knew were prepared to fight for ZAPU, the African liberation movement.