

# Reimagining Utopias

## Theory and Method for Educational Research in Post-Socialist Contexts

Iveta Silova, Noah W. Sobe,  
Alla Korzh and Serhiy Kovalchuk (Eds.)



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## **Reimagining Utopias**

# Bold Visions in Educational Research

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# **Reimagining Utopias**

*Theory and Method for Educational Research in Post-Socialist Contexts*

*Edited by*

**Iveta Silova**

*Arizona State University, USA*

**Noah W. Sobe**

*Loyola University Chicago, USA*

**Alla Korzh**

*School for International Training Graduate Institute,  
World Learning, USA*

and

**Serhiy Kovalchuk**

*University of Toronto, Canada*



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This edited volume embodies the collective effort of budding scholars, seasoned researchers, and experienced practitioners who have been conducting research about educational transformations and working in different capacities in post-socialist Africa, the former Soviet Union, and Southeast and Central Europe. The ideas that brought this volume to life emerged during the informal conversations among the editors during the 2012 Annual Meeting of the Comparative and International Education Society in San Juan, Puerto Rico. Alla Korzh and Serhiy Kovalchuk, who were doctoral students at that time, shared their fieldwork dilemmas in the post-Soviet region with the senior scholars in the field – Iveta Silova and Noah W. Sobe – and brainstormed ideas about an edited volume. At that time, Alla Korzh just completed her fieldwork in Ukraine, examining disadvantaged youth's educational inequalities in Ukrainian orphanages and society at large. During her fieldwork, she faced multiple challenges ranging from navigating access to orphanages that historically used to be closed to the public to grappling with the utility of neo-Marxist theories in the cultural context largely averse to Marxism. Serhiy Kovalchuk was preparing for his fieldwork in Ukraine to study what teacher education for democracy might mean in the context of a rapidly transforming post-authoritarian society, the topic which was perceived by many of his research participants as “politically provocative.” The shared frustrations and concerns about the lack of scholarship that addresses theoretical and methodological dilemmas in post-socialist contexts catalyzed the idea for this edited volume with a hope to serve as a guide for scholars, researchers, and practitioners working in the field of post-socialist education research.

Informal conversations among the editors further developed into meetings, workshops, webinars, and conference panels during the ensuing annual meetings of the Comparative and International Education Society. The panels and webinars drew new scholars, many of whom were in the middle of their dissertation fieldwork in post-socialist countries, as well as seasoned researchers who, despite their experience in the field, faced similar theoretical and methodological dilemmas. Many who participated in those gatherings contributed their individual chapters to the volume. Some, while being interested in sharing their dilemmas, decided not to do so fearing for potential political implications and even personal safety in the context of fragile and authoritarian political regimes. The development of this first ever volume on education research in post-socialist contexts would not have been possible without every contributor and reviewer who shared intimate insights about their intellectual and ethical struggles and generously volunteered their time to provide valuable peer feedback to the authors.





IVETA SILOVA, NOAH W. SOBE, ALLA KORZH AND  
SERHIY KOVALCHUK

## 1. INTRODUCING RESEARCH DILEMMAS IN POST-SOCIALIST EDUCATION CONTEXTS

Since the fall of the Berlin Wall in 1989, there has been a myriad of attempts to understand education change in Southeast and Central Europe and the former Soviet Union. While offering important explanations and interpretations about the changing contexts of educational institutions and communities, research on post-socialist education transformations has also revealed multiple theoretical, methodological, and ethical dilemmas. This book seeks to creatively mobilize theory and method to address the dilemmas we encounter in conceptualizing and conducting research in post-socialist education settings.

Theoretically, much research has been conducted within the dominant Western conceptual paradigms, which often explain the complicated post-socialist reform trajectories in terms of a linear path from socialism to neoliberal capitalism (Fukuyama, 1992; Jowitt, 1992). Viewed through a singular Western lens, the complicated experiences of the post-socialist world have been invoked merely as a lagging temporality in the processes of global educational convergence. Consequently, the difference, diversity, and divergence of the post-socialist education space have been systematically erased in the expectation that the region will eventually become (just like) the West (Silova, 2010). Although more recent research has challenged the possibility of a singular (linear) path to post-socialist transformations and revealed the ways in which “Orientalization” has affected academic knowledge production about the region (see Perry, 2005, 2009; Silova, 2010, 2011, 2014; Griffith & Millei, 2013), concerted scholarly attention has not been given to generating theory and research methods that would allow for more complicated, authentic, and accurate analyses of the post-socialist world. The absence of such analyses in the area of post-socialist education transformations is particularly stark. This presents the first and perhaps most important theoretical dilemma that this book attempts to tackle: *How do we reconcile the appropriation of Western theoretical frameworks for research in post-socialist region(s)? How do these frameworks enhance or limit our research imagination? And how can we move beyond the existing frameworks to articulate new theoretical insights?*

Methodologically, much research has relied on traditionally established data collection and analysis tools – surveys, interviews, focus groups, observations, document analysis – which have been used in various ways to produce so-called

“reliable” and “valid” data in order to explain post-socialist education transformations. However, even some of the best methodologically conceived research can easily fail to capture post-socialist experiences and realities situated in these complicated socio-cultural and political contexts. In the shadows of socialist surveillance cultures, surveys can yield plentiful but pointless data. Survey respondents may bias results due to social desirability or inexperience in answering survey questions. When research participants remember arrests and detentions that resulted from friends, neighbours, and co-workers turning each other in, formal interviews and focus groups can reproduce official dogmas or lead to extremely shallow data, especially when participants feel a collective pressure to protect their communities from outside influence. In *Research dilemmas: Anthropologists in post-socialist states*, DeSoto and Dudwick (2000) note that relationships based on friendships, care, and trust may be more meaningful, despite the potential costs in terms of theoretical commitments, analytical objectives, or perceived objectivity. Similar to many contributors to this book, DeSoto and Dudwick (2000) argue that unplanned encounters, informal and spontaneous conversations, and private exchanges can yield more in-depth and nuanced understandings of post-socialist transformations than more formalized data collection tools could. This can unsettle traditional notions of “truth,” “reason,” and “knowledge” as they commonly circulate in social science research, thus revealing another research dilemma addressed in this book: *What counts as legitimate knowledge(s)? How do we validate knowledge that our research produces in post-socialist spaces? What are the dynamics of Western and indigenous knowledge production? What are the alternative ways of producing and validating knowledge in post-socialist contexts?*

Ethically, the dilemmas are both complex and diverse. Obtaining a formal permission to conduct human subjects research in post-socialist education settings (for example, through Institutional Review Board approval) does not necessarily guarantee that research participants will have the supports and protections necessary for informed consent and active participation. Researchers may also face the post-socialist red tape and bureaucracy at the Ministries of Education, local authorities, or schools; they may be required to negotiate access to research participants with the local (political) gatekeepers, especially if participants represent traditionally marginalized groups; and they may even need to pay for access to research sites. As Christine Beresniova points out in her chapter, “permission [to do research] is not the same thing as participation.” In the post-socialist contexts, participation may entail removing the distance between researchers and participants to develop trust. Similar to research dilemmas in post-socialist Asia, “professional detachment” is sometimes neither an option nor a goal for researchers who attempt to creatively “balance empathy with observation, and scholarship with advocacy” (Turner, 2014, p. 2). This constitutes the core of yet another research dilemma addressed in this book: *What are the intellectual, ethical, and political dimensions of doing research in post-socialist education spaces? How can we navigate these ethical dilemmas in light*

*of academic expectations and fieldwork realities? What is the purpose of our research beyond its contribution to existing scholarship?*

This book has brought together an interdisciplinary group of researchers and activists who have been grappling with these research dilemmas over the last two decades in order to critically reflect on theory and method in the context of post-socialist education transformations. Contributors include education researchers and practitioners from across different geopolitical spaces, including post-socialist Africa (Ethiopia, South Africa, Tanzania, and Zimbabwe), the former Soviet Union (Azerbaijan, Kazakhstan, Lithuania, Russia, Tajikistan, and Ukraine), and Southeast and Central Europe (Albania, Bulgaria, Croatia, Poland, Romania, and Slovenia). We have deliberately included contributors from foreign (non-local) researchers who conducted research in post-socialist education contexts, as well as the experiences encountered by local researchers undertaking fieldwork in their own home cultures. While their experiences may be distinctively different, we believe that these variations can help us further understand the nature of the research dilemmas we outlined above.

Collectively, the chapters do not only expose the limits of dominant conceptual frameworks and research methods for understanding post-socialist education transformations, but they also engage creatively in broader challenges to mainstream theorizing on education, post-socialism, and globalization. Through case studies, conceptual essays, and autoethnographic reflections, the contributors reveal the complex nature of conceptualizing and conducting research in and about post-socialist education transformations through interdisciplinary research that intersects the fields of education, political science, sociology, anthropology, and history. The chapters particularly highlight the themes of researcher positionality, power, and privilege; scholarship, community engagement, and activism; methodological challenges and research ethics; as well as theoretical and conceptual dilemmas involved in the knowledge production processes.

#### RESEARCHER POSITIONALITY, POWER, AND PRIVILEGE

For many contributors to this book, the research dilemmas we discuss have clearly surfaced only after direct and intensive engagement in their fieldwork. Seemingly well conceptualized research studies, which have been carefully reviewed by Institutional Review Boards, dissertation committees, or funding agencies, suddenly posed multiple problems as researchers engaged in the data collection or analysis process. Ranging from access to research sites and participants to power and privilege, these problems primarily stem from how we position ourselves and are positioned by others via-a-vis a marker of difference or boundary: language, nationality, ethnicity, gender, or academic and professional background. This in turn determines our ability to observe, learn, and understand the context of our research. This is true not only for the so-called researchers from “outside,” but also for the “insiders” or “halfies” (i.e. scholars with mixed national or cultural identities) who conducted research in their

home countries. As Abu-Lughod (1991) writes, we “cannot easily avoid the issue of positionality. Standing on shifting ground makes it clear that every view is a view from somewhere and every act of speaking a speaking from somewhere” (p. 468). The issue of researcher positionality thus becomes central in addressing research dilemmas related to power, privilege, and representation, once again highlighting the importance of reflexivity in social science and comparative education research.

In a chapter “‘She’s our spy’: Ethnography and the mapping of cultural minefields in Lithuanian educational reforms,” Christine Beresniova examines fieldwork challenges experienced in Lithuania and asks whether methods reliant on interviews and participant observation need to shift in order to account for sensitivities in countries emerging from a history of mass surveillance. This chapter focuses on the meanings of the commonly applied nickname “spy,” which is used in post-socialist states in various ways to “other” those perceived as national or group outsiders. While many scholars have recounted situations in which the term was applied to them, few have explored what this moniker tells us about the role of research in post-socialist settings. Beresniova finds that there is unexplored cultural weight in the term that reflects social fragmentation in different relationships. Furthermore, she argues that acknowledging the use of the term as more than a Cold-War holdover requires social scientists to build trust with informants and remove the distance between the researchers and participants in order to ensure trust and participation. Ultimately, this participation has helped the author expand mainstream research frameworks beyond the “Western” explanations of educational obstacles as signs of local deficiency. The participation has also helped her to reveal existing productive contestations over cultural values inherent in post-socialist transformations.

The explicit use of reflexivity as an approach to qualitative data collection is the theme of Tatiana Bogachenko’s chapter “Applying reflexivity to educational research in post-socialist contexts: Fieldworker as an insider-outsider.” She draws on her experience as a Ukrainian citizen undertaking postgraduate work in Australia and then returning to Ukraine and Russia for ethnographic data collection about context-friendly educational change in foreign language teaching. While her position as an “insider” and “a person of post-Soviet descent” seemed to be an advantage initially, the research became more complicated when the author realized that she was also being positioned by her participants as a resident of the Western country, a professional colleague, a friend, a visitor and a guest, a young and single woman, an interpreter, and a traveler, among other roles. These multiple subjectivities entailed particular power relationships, ethical dilemmas, and language-related issues, which shifted and necessitated (re)negotiation each time the researcher’s positionality changed. While navigating these multiple roles was challenging, Bogachenko argues that it was ultimately beneficial for her study, enabling her to “see” educational change in ways she would have been unable to observe otherwise. More importantly, her deep reflexivity (including reflexive writing as a part of the research) has contributed to developing trust, facilitating openness, and “empowering” her participants to make their own interpretations and thus co-construct knowledge with the author.

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Taking a similar interest in researcher reflexivity, Meg P. Gardinier's chapter "‘Now I have three directors’: Examining power, positionality, and the making of meaning in post-socialist educational research" explores epistemological and methodological dilemmas she experienced while conducting ethnographic research in post-socialist Albania. Due to the legacy of authoritarianism, establishing trust with participants and gaining access to research sites brought challenges that, upon reflection, illuminated some of the implicit power dynamics embedded in the educational system, as well as in the process of cross-cultural research. The author employed a reflexive methodology based on feminist theory and epistemologies to make sense of her positionality during the research process. Through an analysis of select research memos, Gardinier highlights how research participants reacted and responded to her as a foreign researcher interested in learning about the various identities, forms of knowledge, and pedagogical practices of educators in post-socialist Albania. She argues that in post-socialist contexts, where power relations may be masked or obscured due to legacies of authoritarianism, reflecting on positionality and valuing research participants' diverse forms of knowledge can serve as important tools for unpacking multiple sites of meaning and generating new knowledge.

In her contribution to the volume, "Pedagogical peep show: The challenges of ethnographic fieldwork in a post-socialist context," Elena Aydarova analyzes the struggles she experienced as an educational ethnographer in Russia along four contextual dimensions – economic, socio-cultural, political, and personal – to explore ways in which participants positioned her in different situations. Because of the interplay between contextual factors and subject positions made available to her, she experienced ethnographic research as a "pedagogical peep show" wherein she was a spectator who sometimes had to pay for the "pedagogical show" of lectures, seminars, and faculty-student interactions. She notes that even though there were multiple opportunities to learn, this learning carried with it a transgressive quality of an illicit act. Deeply troubled by the positions she was assigned during her field research, Aydarova suggests that she would have been better prepared had she conducted a context analysis along the four dimensions – economic, socio-cultural, political, and personal – to examine what obstacles, challenges, and struggles might arise.

## RESEARCH, COMMUNITY ENGAGEMENT, AND ACTIVISM

When research involves minorities and underprivileged groups, ethical issues can become more complicated and pronounced. Although research participants may not be in positions of political power or economic wealth, they are never passive victims of the post-socialist transformations. They often quietly and cleverly contest the "rules" of the ruling majorities through what Scott (1990) calls "hidden transcripts," while being well aware of the malleability of culture, history, and social relations (Turner, 2014). Hidden transcript, defined as "discourse that takes place 'offstage,' beyond



direct observation by power holders, constitutes open acts of resistance expressed in disguise with a purpose to contest domination” (Scott, 1990, p. 4). Embodying critiques of power, hidden transcripts may manifest themselves through “offstage speeches, gestures, and practices that confirm, contradict, or inflect what appears in the public transcript,” or open interaction between the powerful and the subordinate (Scott, 1990, p. 2). Working with minorities in subordinate positions often generates a strong desire to address inequities and support research participants, leading to the ethical “quandaries raised when trying to balance empathy with observation, and scholarship with advocacy” (Turner, 2014, p. 3). The chapters in this section explore these quandaries in the contexts of working with Roma populations in Romania and Bulgaria, as well as economically deprived populations in rural Tajikistan.

In her chapter “Reflections on Holocaust education of the Roma genocide in Romania,” Michelle Kelso examines ethical issues and challenges she faced as a Westerner working alongside local partners while conducting research and Holocaust education programming in Romania, a post-communist country that for nearly six decades denied responsibility for its perpetration of the Holocaust. From 1941 to 1944, the German-allied Romanian regime led a genocidal campaign against its Jewish and Romani populations. Over 200,000 Jews and 10,000 Roma died in camps in occupied Romania. Since 2004, Romania has begun seriously examining its dark past. The majority of Romanians know almost nothing about the Holocaust, which remains an understudied subject in schools. Kelso focuses on formal and informal education about the Holocaust concerning the inclusion of the Roma minority, a deeply impoverished, discriminated against, and marginalized ethnic group in Romanian society. The study draws upon ethnographic fieldnotes, transcriptions of seminars and meetings, and discussions with Romanian high school students, researchers, and government officials to illustrate the complexities of paradigmatic schisms in research and teaching.

Questions of partnership, community involvement, and researcher-researched dynamics reverberate through Veselina Lambrev’s contribution to this volume. In a chapter titled “Journey of a ‘Gadzhe’ researcher: Rethinking the use of reflexivity in research in post-socialist contexts,” Lambrev explores the complexities of her fieldwork as a non-Romani researcher among three Romani communities in post-socialist Bulgaria. Working with this historically marginalized population, Lambrev had to face the legacy of education research and policymaking that has traditionally excluded the Roma perspectives, legitimized negative stereotypes, and reinforced the social exclusion of Roma. Entering into such historically unequal power relationships, Lambrev engaged in in-depth reflections on her Bulgarian dominant cultural stance and the complex ways in which power was exercised and navigated in the field. In this context, reflexive accounts were essential and powerful methodological tools for Lambrev (as a dominant researcher) to minimize power differential, respond to ethical issues, and honor the perspective of the respondents in culturally appropriate manners. Such an approach enabled Lambrev to gain insights into the indigenous Roma perspectives about the strategies for youth empowerment,

rooted in the knowledge, culture, and engagement of Roma students, families, and communities. Such an approach requires full input of minority community members thus re-shaping power imbalance and supporting active participation of Roma in knowledge mobilization and decision-making about their own communities.

In a chapter titled “Fieldwork as socially-constructed and negotiated practice,” Sarfaro Niyozov argues that doing successful educational research in Central Asia is a process of multilevel negotiation between possibilities, challenges, and researcher’s personal practical knowledge and social and political skills. Niyozov highlights some of these negotiated themes (such as identity, ideologies, politics, physical geographies, health, and emotions) during his own professional and academic journey as a graduate student, professor, and consultant in the former Soviet Union, post-Soviet Tajikistan, and Central and South Asia. Reflecting on his personal experiences in research and international development in Tajikistan, Niyozov notes that successful research requires negotiation and strategic use of one’s multiple identities, as well as methodological plans and procedures – through “a process of give and take” – in order to develop the intellectual, political, and linguistic capacities. He argues that fieldwork and research in general are socially constructed and produced through the interaction between the researcher, the participants, the theories, and the context. The quality of this process depends on the quality of the negotiation that the researcher makes with all elements involved.

#### DATA COLLECTION, COLLABORATIONS, AND ETHICS

While many ethical issues in education research can be meaningfully addressed through the processes of researcher reflexivity and positionality at different stages of the research process, there are additional complicated ethical points that are not so easily resolved. The first two chapters in this section directly address the nature and implications of working with Institutional or Ethics Review Boards (IRBs and ERBs), highlighting how standardization and regulation of such institutional bodies, although a necessary mechanism to ensure research integrity, may present unexpected research challenges for researchers working in intercultural, post-socialist contexts. The other two chapters examine the ethical challenges and opportunities of working with large surveys and conducting analysis in post-socialist education reform contexts.

Christopher Whitsel and Martha Merrill focus on the ways that Institutional and Ethics Review Boards in North America place constraints on researchers conducting international fieldwork. Based on a review of the existing literature, analysis of IRB/ERB policies from a sample of North American universities, and findings from a survey with scholars conducting research in Eurasia, their chapter “Institutional review boards and intercultural research barriers” argues that ethics review board policies and procedures not only fail to achieve their goals of protecting human subjects, but also may limit the research imagination of those trying to understand the region. While some concerns are common to fieldwork in other international

research contexts, the authors also point out challenges specific to the Eurasian research settings. In particular, they explain that the informed consent process often does not match cultural expectations in Eurasia. Signing a document may overly formalize the relationship between researcher and participants, which can in turn inhibit communication. Furthermore, informed consent emphasizes individualism and social equality versus communalism and a social hierarchy, which may go against cultural expectations in Eurasian countries. Above all, institutional review board regulations may limit the ways scholars conceive research ideas, without necessarily increasing protection for participants.

In “‘Come together’: Navigating ethical (un)knowns through dialogue in community,” Elise S. Ahn and Maganat Shegebayev share their experiences of conducting school-based research in the absence of ethical review board procedures in Kazakhstan. Drawing from the narrative accounts of three research projects, the authors reflect on the challenges of navigating the education-research landscape in an institutional environment that is undergoing transition in multiple domains. They conclude that the interstitial space that emerges in education-in-transition contexts like post-Soviet Kazakhstan can provide researchers opportunities to engage in meaningful reflection. They suggest that essential to engaging in reflection is the need for researchers to adopt a dialogic ethic within a community of practice, which can be invaluable for thinking through and responding to ethically unclear or “messy” moments while conducting research in dynamic socio-cultural-political contexts.

Ulviyya Mikayilova and Elmina Kazimzade’s chapter “Facing the research challenges: Lessons learned from monitoring study on education reforms in Azerbaijan” examines the problems researchers face in the specific context of monitoring curricular reforms in Azerbaijan. Their qualitative research addressed the issues stemming from the long-term quantitative monitoring studies of national education reforms by international development agencies such as the World Bank. The authors interviewed data collectors who were involved in the monitoring studies to gain a better understanding of why these monitoring studies failed to produce “reliable” data, as well as explain the causes of social desirability bias and high non-response rates among teacher respondents. The findings point out a variety of factors affecting research reliability, including the lack of experience among local stakeholders to participate in paper surveys; a lack of “shared vision” and “ownership” over the change process and thus unwillingness to provide feedback; a desire among participants to protect themselves by over-reporting positive attitudes; and the inexperience or insufficient professional preparedness of data collectors to identify and address these challenges. The authors conclude that it is necessary to keep a balance between qualitative and quantitative approaches in the national monitoring studies to ensure high quality research outcomes.

Benjamin Kutsyuruba reflects on his experience of “Using document analysis methodology to explore educational reforms and policy changes in post-soviet Ukraine.” He notes that significant political, social, and economic changes trigger

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policy and legislation transformations at the governmental level. Subsequently, the changing documents and policies form a documentary or material culture of multiple and conflicting voices and differing and interacting interpretations. Document analysis methodology allows researchers to get a deeper understanding of the nature of documents related to interactions and relationships in the educational systems. In this chapter, he analyzes his research experience with using document analysis methodology to explore educational reforms and policy changes in post-Soviet Ukraine. He discusses the significance, nature, and specificity of documentary/material culture, the inherent cultural challenges and contextual dilemmas, and the benefits and drawbacks of using qualitative document analysis method while conducting research in post-socialist contexts. He concludes with a discussion of how the content and context analytic framework that was helpful in his research could be adopted for use by researchers in post-Soviet educational contexts. This reflective research endeavor offers an insight into his personal experiences with various categories of documents, approaches to document analysis, and perceived documentary impact on transformations in the policy frameworks and implementation of educational reforms.

#### DISCIPLINARY PARADIGMS AND ACADEMIC TRADITIONS

The last section brings together the authors who engage with theoretical dilemmas to understand and conceptualize post-socialist education change. While theoretical, methodological, and ethical dilemmas are often interrelated, the focus here is specifically on the constraints imposed by the established disciplinary paradigms and academic traditions. While some authors point to the limitations of Western theoretical and methodological traditions, others attempt to carve a space for indigenous knowledge production and theorization in comparative education, thus offering alternative ways of producing and validating knowledge in post-socialist contexts.

In “Beyond teleological rationality in post-socialist educational research,” Marta Shaw draws on Kuhn’s (1962) concept of “apparent absurdities” to critique previous research of post-socialist education for failing to present findings as rational rather than illogical or absurd. She argues that post-socialist institutions exist in social and organizational mechanisms that defy rationality understood as an alignment of aims and means. Apparently paradoxical findings of many studies of education in the post-socialist region may stem from Western researchers’ unreflective immersion in the assumptions of instrumental rationality. The author argues that a lingering influence of mental models dating from the 19th century appears especially pronounced in the field of comparative and international development, where a linear view of progress underlies much research on post-socialist educational change. One possibility for moving the conversation forward is problematizing the extent to which the dynamics of post-socialist social systems reflect the form of rationality that permeates our theoretical constructs, even though it has been dethroned in other disciplines. Systems

theory is suggested as one possible path of exit from instrumental confinement. Seen through the systemic lens, an educational organization or system self-perpetuates the patterns prescribed by its identity, and responds to the environment through adaptations that enable it to preserve and realize that identity.

Ivana Cosic deliberates whether the capability approach could be used as an alternative, 'non-Western' lens for understanding post-socialist transformations in education and what its possibilities and limitations are. In "Theory and standardized assessment in Croatia: An alternative investigation informed by the capability approach," she discusses conceptual perspectives for viewing standardized assessment in a post-socialist setting. Standardized assessment is a globally traveling reform linked to educational effectiveness and competition between schools, states, and nations. The chapter argues that conventional explanations of teacher responses to standardized assessment, which rely on critiques of an increasingly neoliberal and globalized world, do not seem to do full justice to the constantly changing post-socialist educational settings. Adopting (and adapting) the capability approach, the chapter reveals that the standardized secondary school leaving exam (State Matura) in Croatia made teachers more rather than (as would have been expected) less interested in policy and advocacy work. The concept of educational value brought into light by the capability approach enables researchers to trace how teachers' expectations of standardized assessment resulted in teachers' increased engagement in policy-making.

In "Slovenian pedagogy between social sciences and humanities: Historical, theoretical, methodological and comparative implications," Irena Lesar and Klara Skubic Ermenc reveal the interplay of different pedagogical paradigms – cultural pedagogy, reform pedagogy, and socially-critical pedagogy – that have become visible in the post-socialist era. They examine the development of pedagogy as a reflective/theoretical science in Slovenia, specifically focusing on the fundamental research subject – that of *vzgoja* – which implies an intentional process aimed at reaching goals related to the holistic development of children. Drawing on historical data, the authors show not only that the concept of *vzgoja* is a scientific concept, but they also defend the thesis that ideas and theories related to *vzgoja* cannot be fully conceptualized, researched, and applied in practice solely by deploying the social scientific approach. On the contrary, they claim that simultaneous references to the humanities and the social sciences are crucial and can strengthen pedagogy, which has the potential to find solutions to contemporary challenges regarding the coexistence of people in diverse societies, including the formation of respectful, sympathetic, and righteous individuals.

The last two chapters examine post-socialist education research dilemmas in the African context. Yirga Woldeyes reflects on the possibility of cultivating post-socialist knowledge traditions in Africa by interpreting what was revealed and silenced through the socialist experience. In "Tirguaamme: An Ethiopian methodological contribution for post-socialist knowledge traditions in Africa," Woldeyes considers post-socialism an open space unconstrained by epistemological loyalties to the west

or east. The chapter presents a traditional Ethiopian methodology of knowledge production as an example of what is hidden behind (post)socialist constructions. *Tirguaamme*, a traditional practice of interpretation through creative incorporation and critical meditation, enabled Ethiopians to produce knowledge from diverse sources and use it in the traditional education system. Creative incorporation is the process of interpreting knowledge from foreign sources, while critical meditation is the practice of reflecting on social issues, as evidenced in the meditation of Zara Yacob. This chapter argues that traditions such as *tirguaamme* can become dynamic and relevant sources of knowledge for post-socialist education in Africa.

Mark Malisa continues the examination of the place of socialism in South Africa, Tanzania, and Zimbabwe. In “Masakhane, Ubuntu, and Ujamaa: Politics and education in (post) socialist Zimbabwe, Tanzania and South Africa,” he argues that even though a significant part of the world might have abandoned socialism, for many African countries, a version of African socialism might be the only option for redressing centuries of abuse and exploitation by European conquerors. However, such a quest requires new methodological tools and philosophies, as well as an acknowledgement that the paradigms and languages from Anglo-American academies might be insufficient when it comes to researching and rebuilding post-socialist Africa. Anglo-American methodologies will have to be receptive and open to languages and philosophies of those it had deemed inconsequential to modernity.

Collectively, the authors in this volume aim to advance a conversation about a variety of specific challenges of doing research in post-socialist contexts, addressing the political, social, cultural, and ethical dilemmas that arise when the new and old utopias of social science confront the new and old utopias of post-socialism. While contributing to the creation of a much-needed platform for making sense of research conducted in (and about) post-Soviet educational spaces, we hope that this volume will also have the potential to propel, what Kenway and Fahey (2009) have called, “a defiant research imagination,” which is directed against the closure of meaning and towards emancipatory understandings of historical, political, and social realities (p. 38). We believe that such a critical, collaborative, and creative approach to reflecting on the theoretical, methodological, and ethical research dilemmas is key to charting alternative visions and reimagining education utopias in a rapidly changing post-socialist world.

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**SECTION 1**

**RESEARCHER POSITIONALITY,  
POWER, AND PRIVILEGE**

CHRISTINE BERESNIOVA

## 2. “SHE’S OUR SPY”

### *Power and Positionality in Studying Lithuanian Teacher Communities*

#### INTRODUCTION

In 2010, I travelled to Lithuania to undertake dissertation feasibility research on Lithuanian Holocaust education. During this time, I was granted permission to observe the teacher training programs of the International Commission for the Evaluation of the Nazi and Soviet Occupation regimes in Lithuania (herein the Commission). The Commission had emerged out of NATO and EU accession guidelines that required more comprehensive Holocaust education in Lithuania before they were able to join western organizations. As the only scholar to ever study Commission educational programs since their inception in 2003, gaining permission was essential to my research design. However, when I started my research the following year, I quickly realized that permission was not the same thing as participation. Though I spoke the language, was married to a Lithuanian, and dutifully passed out my IRB information sheets extolling the significance of teacher participation, gaining access to teaching communities was much harder than originally anticipated. While challenges in rapport building are common in ethnographic inquiries, conducting comprehensive social science research in countries with a history of mass surveillance demands particular sensitivity to community relationships.

Disastrously occupied three different times during World War II, many Lithuanians are wary of foreign governments bearing political promises. Several decades of post-Soviet independence have also produced mixed emotions about the role of western guidance in Lithuanian educational reforms. For those with long-term experience in the region, it’s no secret that “being American” no longer has the social purchase it once did. Therefore, even though I had permission from the Commission to study their teacher training programs, they seemed cautious about my presence. Run by only two staff members, both Commission employees seemed fundamentally unclear about what educational anthropologists did. When I asked them to invite me to every event they sponsored, they seemed slightly startled. In fact, just as I was about to leave the field in 2013, Ona, my key participant from the Commission, admitted to me with a laugh, “I remember when you first contacted me, I thought, ‘What does this crazy American girl want from us?’” It was hard to believe we were both sitting in her office at the Lithuanian government building after two years of research there. I sat watching her stir honey into her coffee and said, “I can’t believe it’s over.” She replied, “I know.

I can't believe it either. I have become so used to you being here." What struck me most about that moment was leaving as a member of a community to which I never thought I would gain access. Not only that, Ona saw me as a colleague contributing to the same work that she valued—and as a criticalist scholar who believes in doing research to effect democratic change, this was significant. I had done more than gather data; I had become an active participant in post-Soviet educational reforms.

Cautioned by many that anthropology purists would criticize my direct involvement in Lithuania, I knowingly made the decision to work alongside teachers to promote Holocaust education as part of my research. To be sure, the "boundaries" of my roles as an educational anthropologist were blurred. However, I argue that to produce effective research in post-Soviet states, this blurring of roles should not be seen as an effect of ethnographic research, but an integral part of the research design. Although this may sound like the promotion of Participant Action Research (PAR), a method that often puts community involvement ahead of data collection, this is not a call to see this particular form of research as the singular paradigm for post-Soviet studies. Instead, this chapter argues that by shifting positions, one can better interrogate how ascribed roles can influence the use of certain methods in studies of post-socialist educational reforms.

To this end, this chapter discusses how the history of Soviet society and post-Soviet reforms challenged me to reconsider the ways in which anthropological research was understood in a post-Soviet educational setting. By situating myself within multiple roles, I was able to view the post-Soviet experience differently and expand my study to include a multi-sited ethnographic account of transnational policy processes. In so doing, western assumptions about the purpose of education, which are rarely examined in post-socialist education research, became an integral part of the study. This approach helped to expand prior research frameworks that viewed educational obstacles in post-socialist settings as representative of local deficiency, rather than productive contestations over cultural values. As a result, this chapter suggests the need to better problematize positionality in post-socialist research.

#### ETHNOGRAPHY

Rejecting the view that social reality is "out there" waiting for researchers to find it, my research uses ethnographic methods that examine the processes through which meaning is made in the daily lives of individuals. As Lila Abu-Lughod (1991) writes, "The effects of extralocal and long-term processes are only manifested locally and specifically, produced in the actions of individuals living their particular lives, inscribed in their bodies and their words" (p. 474). In other words, ethnographic methods are best suited to gather the details of conversations, contexts, meanings, and lived experiences. These details provide the researcher the ability to map relationships, patterns, and systems of belief across and within communities and groups.

James Clifford (1986) sees ethnography as being "actively situated *between* powerful systems of meaning" (p. 3), which allows the researcher to pose questions

"at the boundaries of civilizations, cultures, classes, races, and genders" (p. 3). Because ethnographic accounts are situated at the boundaries of systems, ethnography is especially effective in capturing the messiness of post-Soviet transformation processes. Michael Herzfeld (2000) writes that the post-Soviet sphere is a place where ethnographic methods are "all the more urgent" because "people's understandings of what is happening to them cannot be captured by any of the top-down methods that once dominated, for better or for worse, the analysis of Soviet and Soviet-controlled society" (p. 221).

Committed to ethnography as the most useful method for understanding what Holocaust education meant to individuals in Lithuania, I further employed a specific kind of ethnography, critical ethnography. The criticalist aspect of this approach meant that my research focused on how power influenced truth claims, as "all thought is mediated by power relations which are historically and socially constituted" (Carspecken, 1996, p. 4). By examining the way power relations operate, criticalism intends to contribute to the development of more democratic societies—an aim that sometimes encourages direct involvement—sometimes seen as activism on the part of the researcher.

Criticalism lends itself as a framework to scholars who are more inclined to undertake activist research, or those who have what Gloria Ladson-Billings and Jamel Donnor (2008) call "a revolutionary habitus" (p. 395). In other words, this means that some criticalist scholars work in spaces beyond academia so that their research can help foster "more just and equitable societies" (p. 396). Douglas Foley and Angela Valenzuela (2008) write that scholars who are concerned with participating in social activism are still small in number due to the fact that activism is not rewarded or encouraged by the academy (universities and research institutions). Nonetheless, they still find that "the number of politically active anthropologists and sociologists appears to be growing" (Foley & Valenzuela, 2008, p. 292). Often, critical researchers find themselves not only observing participants, but also working alongside them, as researchers "take up" the fight of the communities they are studying to varying degrees. In discussing the role of critical anthropologists as activists, Foley and Valenzuela (2008) write, "This is not to argue that one notion of collaboration is superior to the other, but it is clear that 'native' or insider ethnographers may have to march to the beat of a different drummer" (p. 306). Still, conversations about the degree to which anthropologists can and should participate in the community they are studying raises normative questions about the "appropriate" role of an anthropologist.

Discussing ethics in anthropological fieldwork, Jeffery Sluka (2007) writes "in defining professional interests and duties, anthropologists are now wavering between responsibility to the people researched, on the one hand, and service to those who funded the research and the authorities under whose jurisdiction those researched live, on the other" (p. 272). While not all research needs to take up the "fights" that participants deem important, the decision to do so is increasingly visible in applied and critical research methods. In fact, my ability to finally gain access to teacher

communities in Lithuania was due in large part to the fact that I was willing to do the same work—and thus face the same social consequences—as teachers working with the topic of the Holocaust. However, before that happened, I had to traverse a rough terrain of questions about my motivations for working as an American researcher in post-Soviet Lithuania.

#### FIELDWORK DILEMMAS

George Marcus (1995) writes, “Ethnography is predicated upon attention to the everyday, an intimate knowledge of face-to-face communities and groups” (p. 99). Yet an intimate knowledge of face-to-face communities requires people who actually want to be face-to-face with *you*. For the first three months of my fieldwork, no one would talk to me. I was an outsider bearing a Russian surname, casually throwing around the word “tolerance” and chasing ghosts of the Holocaust. Add a characteristic dose of Lithuanian reservedness to that already veritable Molotov cocktail of social issues, and it makes sense why no one wanted to talk to me. Now, I can laugh about it, as I did the other day on Facebook when Deividas, a teacher with whom I worked, joked that if anyone asked about me, he’d simply say, “I’ll mention that, yeah, sure, there was this weird American woman who came to teach us about our own history which we were trying so hard to forget and ignore, but she just had to put some salt on an open wound... Right?” However, when I first arrived in the field in 2011, I was worried that that was what people actually thought. I started to question whether my feasibility study the summer before had misled me about my ability to do research on this topic in Lithuania.

As I started to recognize challenges in conducting research on Holocaust education in Lithuania, I was forced to examine what was inhibiting my ability to gain access to the educational community. When I first arrived, I visited Lithuanian schools armed with a notebook and a tape recorder; however, in a country still emerging from a history of mass surveillance, these accessories were looked at askance by most Lithuanians. Individuals wanted to know for whom I was spying, Russia or America? My protestations to the contrary were met with scepticism. Most teachers believed I had some kind of political agenda to push. It took me months of showing up to events in Lithuania just to get people to talk to me, and even when I started to receive more regular invitations to observe teacher training seminars, I was still looked at with wariness. Gerald Berreman (2007) talks about the “impression management” required of ethnographers when he writes:

The ethnographer comes to his subjects as an unknown, generally unexpected, and often unwanted intruder. Their impressions of him will determine the kinds and validity of data to which he will be able to gain access, and hence the degree of success of his work. (p. 146)

The success of my project required that I become more than the “weird American woman” with the notebook and tape recorder, as Deividas had called me in the quote



above, but there were many roles I would have assume and transcend before that would happen: Spy, halfie, and moral authority.

These roles represented the effect of two decades of prior, well-intentioned western policy reforms that essentialized Lithuania as uniformly backwards and culturally deficient. Few teachers wanted another American “expert” weighing in on their teaching practices. It also did not help that the topic of my research was one of the most controversial programs in Lithuanian schools, Holocaust education. Marked by massive Lithuanian collaboration during WWII atrocities, Lithuanians saw discussions about the Holocaust as a western tool to humiliate them. Thus, national atonement for the violence of the Holocaust in Lithuania was hard to secure, and perpetually in the media. In this context, I was triply marked as a self-serving western spy. Months of reticent teachers who prepped their students for my arrival with token pictures of Jews and the Holocaust led me to realize that I was going nowhere fast armed with the methods I dutifully learned in graduate school.

Lithuanian teachers made it clear that they weren’t interested in helping me until I demonstrated what I could do for them. Most explained that they were tired of being “saved” by the west. Years of western research projects had amalgamated into what they saw as a poor international reputation for Lithuanians. Most were understandably tired of the barrage of western news accounts about virulent Lithuanian intolerance, and few were impressed anymore by the parade of US and EU diplomats bearing roadmaps for the moral re-education of Lithuanian teachers. Lithuanian teachers wanted to be understood on their own terms. Before I could get anywhere, I had to better understand what anthropology meant in the Lithuanian context. Luckily, understanding the legacy of post-Soviet research was visible in the way that many Lithuanians spoke about my positionality. I was labeled a spy, a diplomat, and a moralizing American. All my roles—wanted or not—required me to examine the context in which we all found ourselves after decades of western-driven, top-down political reforms in post-Soviet Lithuania.

Some of the roles ascribed to me as an anthropologist were representative of Cold War history. Being called a “spy,” as I often was, harks back to the fraught political relationships between the US and the Soviet Union during the Cold War. However, some of the roles ascribed to me—and the corollary mistrust they brought—represented Lithuanian reactions to what they saw as decades of policy reforms framed by western arrogance. Navigating perceptions of who people thought I was had a lot to do with the legacy of post-Soviet transformation in Lithuania more so than the Cold War. Diplomats, politicians, and NGO workers from western countries had long been visible in shaping the content of post-Soviet educational reforms in Lithuania. All of these initiatives were borne with their own cultural and historical baggage, but the cultural assumptions of the “bringer” were rarely examined, as the massive cultural changes in post-Soviet states were deemed to be the central focus of political and academic pursuits in the region. Although rarely examined, the history of EU and US involvement in post-Soviet political transformation influences how many people viewed my process of gathering data.

Most notable was Lithuanian fatigue with the presumption that post-Soviet states would simply transition into a mirror image of Western Europe. This view left many local populations feeling marginalized and misunderstood. Iveta Silova (2010) notes this trend in early studies of post-socialist reforms, finding that narratives about the west were often “presented through the familiar narratives of ‘progress,’ ‘hope,’ and ‘salvation,’ which the West is inevitably positioned to bring to the new emerging societies of the post-socialist region” (p. 6). Through such frameworks, the west was implicitly framed as the moral victor of the Cold War.

In this context, early studies of the post-Soviet system framed reforms as moving along a linear path away from Soviet practices toward neoliberal, western ones. Such linear views of transition conceived of Soviet citizens as having had no agency in the Soviet Union, no attachment to their prior identities, and no familiarity with the concept of civil society. Therefore many post-Soviet reforms naively framed (post) Soviet citizens as being empty vessels awaiting democratic salvation (Yurchak, 2010). However, transition along a linear path did not happen as anticipated, and, therefore, studying contemporary post-Soviet states requires reconceptualization of frameworks used to understand the region.

Lisa Wakamiya (2011) writes that a “self-reflexive turn” has finally developed in post-Soviet scholarship, in which “the term ‘Soviet’ can no longer be essentialized into a singular construction of culture” (p. 135). Wakamiya (2011) posits that new frameworks for understanding the Soviet system enable “a narrative of self-determination on the part of Soviet subjects and those who study them” (p. 136). With new frameworks that problematize the limits of early research, contemporary *post-Soviet* studies can better account for the agency of individuals who have long been viewed as only passive actors. However, this theoretical shift results in understandings of post-Soviet life that are “messier” than explanations provided by linear transition models. Therefore, a proclivity still exists to essentialize the post-Soviet region as the recipient of change, rather than an active participant.

The theoretical proclivity to simplify post-Soviet participation has direct ramifications for research methods. Because post-socialist research has long been informed by frameworks that viewed post-Soviet populations as unable to help themselves, research methods tended to “target” passive populations as having no interest or ability to explain themselves. This means that even the most well-intentioned scholars can still unintentionally smuggle in an expectation to find passive populations awaiting the benefits of their research. By undertaking an examination of my roles in the legacy of this methodological context, I found several benefits for my research: (1) the agency of individuals was better understood from their perspective; (2) the influence of historical contexts was more readily seen; and (3) the cultural assumptions of western agencies could be included within ethnographic examinations. Individuals often ascribed roles to me as a way to describe my outsider status in Lithuania, but understanding their context ultimately assisted me in finding my way into many teaching communities.

A SPY: THE PROCESS OF UNBECOMING THE “WEIRD AMERICAN WOMAN”

The most immediate impression of an American traipsing around post-Soviet Lithuania with a notebook was relatively unsurprising: informant—and I don’t mean the anthropological kind. People thought I was a spy. It was often a struggle for me as a researcher to decide when to take notes or use a tape recorder because they both drew attention to me and contributed to assumptions about my purpose. During an interview with a teacher who knew me from several events, I was talking about my research methods, and he asked, “Are the tapes only for you?” I replied with an earnest innocence that I find almost laughable now, and said, “Oh yes, only for me.” He laughed and said, as if knowingly, “And for the KGB.” Outwardly, we both shared a laugh, but inwardly I wasn’t laughing. The final destination of my research was frequently couched in Cold War discourses about spying for the Russians or the Americans.

I felt the shadow of the Cold War acutely one evening as I sat with a group of teachers relaxing after a two-day Tolerance Fair in a major city. Watching droplets of water pool on our skin in the misty sauna, there were many conversations going on at the same time across the steamy setting. Suddenly, there was a lull in the other conversations, and I overheard Ona, my key participant, explain my presence to another teacher with the description, “She’s our spy” [*mūsų šnipas*]. Aware that I had heard her in the now silent sauna, Ona turned to me, put her hand on my damp knee, and asked if I knew that someone in the capital city had expressed concern that I was a spy. I laughed. She didn’t. I asked, “Who?” She told me who it was, and it turned out that the person was a Jewish Lithuanian [Litvak]. In that instance, I felt doubly stung that even as an “outsider” himself (as most Jewish Lithuanians, even if born and raised in Lithuania, are usually held to be), he had othered me.

Later, I was lamenting this constant refrain of outsider-ness to a Lithuanian participant who was involved in Holocaust commemoration in his capacity as a local politician, and I said, “How can I be a spy? I don’t even speak a word of Russian!” I expected him to proffer a bit of collegial support as to the absurdity of it all, but he paused for a moment and said seriously, “Yes, but who better to have as a spy than the one who doesn’t seem like a spy?” After this irritating paradox of spydom, I decided on a few occasions to introduce myself as a spy to see what would happen. When I did this, people would laugh and say, “A spy? You’re not a spy.” I knew that I wasn’t a spy, but it was interesting to me that there seemed to be certain times in which this moniker was useful to others, but it made no sense if I was to invoke it myself. I couldn’t win at the spy name game. Russell Zanca (2000) experienced a similar issue during his research in Uzbekistan:

One of the most frustrating, though at times comical, elements of the field experience is our being seen as suspect in the eyes of local authorities, and sometimes, our local colleagues. Even though the Cold War is dead, we continue to be treated as spies whose motivations for conducting research in a given village is to write up and sell reports to the CIA. (p. 154)<sup>1</sup>

Anna Fournier (2012) also describes an experience being called a spy during her research in a Ukrainian school. She writes that she tried to assuage concerns over being a spy with the answer, “I am not a spy, I am an ethnologist.” However, she explained that because the role of anthropologists in the Soviet Union was political, giving such an answer made her feel “silly.” She recalls that when she gave this answer to a student, “I doubt this answer could have reassured him, as Soviet ethnologists were by nature politically involved” (p. 8). Yet, would an 11th grader in Ukraine have had any memory of ethnologists being part of mass surveillance growing up *after* the fall of communism? Probably not, but the Cold War idiom for untrustworthy elements as spies and informants endures.

Akin to Zanca and Fournier’s experiences, I was ascribed the identity of “spy” to accentuate my otherness, and even though I knew that in most (hopefully all) instances, being called a spy was most likely just a reflection of the vulnerability people felt when it came to outsiders, it still affected my research in real ways. Thus, I had to accept the weight of the historical past on my disciplinary methods and attempt to earn people’s trust in different ways.

In an approach somewhat different than Fournier’s (2012), who decided in her case, “to make my presence more inconspicuous than it had been at the beginning of my fieldwork” (p. 8), I decided to be visible *everywhere*. This was when I decided to work alongside teachers whenever I could.

Soon I was ever present visiting classrooms, helping plan commemoration events, and engaging with international diplomats to help secure program funding. My increased participation in US Embassy events ultimately earned me the reputation in the diplomat community of being, as the US Special Envoy for Holocaust issues called me, “ubiquitous.” (I took this to be a compliment, even though I don’t think it was intended as such.) I understood that being trusted was not a short-term process in post-Soviet Lithuania, so I dug in for the long haul. However, ubiquity had its own impact on my role as an anthropologist when my presence at events led some to see me not as a spy, but a US diplomat.

#### A DIPLOMAT

Sometimes, people would refer to me as “Christine, from the US Embassy” (when I wasn’t working as a spy, I guess). I never adopted this title for myself, but I heard about it in much the same way as the moniker of spy—from other people. The reason for this mislabeling was mostly innocent confusion on the part of Lithuanians. I spoke English, was always working on international “projects.” I was also on good terms with several US Embassy employees. These elements contributed to the impression that I had a professional association with the American diplomatic community. Additionally, my first year in Lithuania, I was supported by a Fulbright fellowship which meant that I was technically “overseen” by the US Embassy, and our Fulbright cohort was indeed invited to a number of events at the Ambassador’s Residence. I was also seen at official Embassy events, meetings, receptions, and