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## 5. CRITICAL SCHOLARSHIP IN SOUTH AFRICA

*Considerations of Epistemology, Theory and Method*

### INTRODUCTION

When researching Otherness against the colonial or apartheid legacy (be it with respect to women, white or black people, or rural communities, for example), the relation between the subject and the object of research develops against the background of the social relations that have been objectively structured in the past, and are currently reproduced. This is particularly important where these relations have been structured, historically, around deeply entrenched categories of social difference such as race, gender, ethnicity, sexual orientation, or socio-economic status. In the context of African scholarship, these largely remain epistemological blind spots. In such situations, research practice in social sciences and education cannot be separated from the relations of domination and subordination inherited from colonial and apartheid social engineering. In South Africa, in particular, disregarding these relations and the marginalising discourses underpinning them, has always been a danger. These discourses are frequently either swept away or just overlooked in intellectual circles and the field of knowledge production (Cross, 2015; Seepe, 2004). Many years after the demise of colonialism and apartheid, few fundamental changes seem to have occurred in these domains.

In this chapter, we revisit the debate about researching the Other in South Africa. We locate and expand it within two key intersecting domains of the intellectual and political field of knowledge production, namely, the knowledge foundational domain (discursive or epistemological), and the social domain (social action and social relations). We explore how these domains interface with the individual agency of social science researchers in the research processes, in relation to perceived forms of social difference. We do so by tracking the main scholarly traditions in recent years, their explicit or assumed epistemological foundations, and their implications for knowledge produced.

The chapter argues that, given the colonial/apartheid legacy, relationships between subjects and objects of study in a social science research context are intentionally or unintentionally conditioned by the imaginary boundaries of race, class and gender, and other forms of social difference. These have profound implications for knowledge conception, formulation and validation.

Many researchers, already privileged through their position in the dominant social structures—constituted as hierarchies and communities of difference (Tierney, 1993; Rowe, 2003)—or through the embodiment of dominant intellectual discourses, very often tend to overlook these epistemological and methodological issues, even when confronted by indisputable evidence. Our argument builds on three basic premises: (i) the importance of awareness or understanding of the social experiences of the researched connected to those specific divisions; (ii) scholarship as an exercise of power and interest subtly articulated in knowledge representation (hence the role of critical agency); and (iii) the implications of the researcher's positioning in the intellectual field or, following Bourdieu (2003), the researcher's 'habitus' (individual dispositions and pre-dispositions that may influence research practice).

#### ANALYTICAL FRAMEWORK

The goal of scientific enquiry or research in social sciences is the search for 'truth' or 'truthful' knowledge, that is, to obtain results that are as close to the 'truth' as possible, or that provide the most valid explanation possible (Mouton, 2009). Taking this into consideration, we draw our conceptual and analytical framework largely from a number of Bourdieu's theoretical constructs. First, Bourdieu's (2003) notion of *original complicity*, and second, the concept of *epistemological break*. Bourdieu (2003, p. 13) uses the notion of original complicity or original crime to refer to a researcher's historico-cultural embeddedness with respect to class, race, gender, and the other forms of social difference that may separate the researcher from the researched. This embeddedness is considered to be the foundation of complicity, and thus indelible culpability, in the field of intellectual research.

Despite the claim of scientific objectivity, researchers can never separate themselves completely from their social condition because of their particular social location. As a result, they may not see beyond their own subjectivities and dispositions and may project these onto the object of enquiry rather than seeing more 'truthful' attributes, and may thus fail to fulfil the epistemic imperative of 'truthful knowledge'. Such distortions are more likely in societies that have undergone profound colonisation and racial segregation, as is the case with many African societies where coloniality of the social is inseparable from coloniality of knowledge and research at large.

Structured along racial, gender and ethnic differences, the dynamics of interest and power play out in the research process in numerous ways. This is not to deny that knowledge construction can assume different degrees of approximation, since social science research is always shaped by its selectivity. For example, one may choose to investigate specific topics/issues due to normative concerns/interests, so that there can be objectivity without researchers being totally disinterested. In scrutinising the responses to this challenge, we look at the epistemological place and significance of the construct of original complicity within South African scholarship.

In South Africa, under colonialism and apartheid, racial, ethnic and gender relations were constituted as relations of power and domination, that is, social groups

were not only constructed as different from other groups, but were also assigned a specific position in the social, economic and political hierarchy. According to the notion of original complicity, knowledge should be refracted through such forms of difference. This would mean that only researchers originating from the same social category, embedded in the same sociocultural experience, and embodying a similar world outlook as a research group, could arrive at truthful knowledge about that research group. This is a somewhat anti-intellectual perspective in our view. However, such an assumption raises important and pertinent epistemological questions: Why should original complicity receive ethical and epistemological privilege? (Bourdieu, 2003, p. 13). Smith (1990) questions whether it is “possible at all to write as ‘Other’ or to write the ‘Other’” (p. 170), and Fawcett and Hearn (2004) ask:

Is it possible to research ‘others’? If so, how is this to be done? And how does this aspiration and this activity relate to more general questions in social science methodology? ... [c]an men research women, white people, people of colour, or visa [sic] versa? (p. 201)

After *original complicity*, we address the concept of *epistemological break*. While earlier philosophers and social theorists (for example, Gaston Bachelard, Karl Marx and Louis Althusser) use the concept of epistemological break to refer to the critical moments when new theoretical consciousness emerges, Bourdieu narrows this concept down to refer to the degrees of vigilance required for achieving a more nuanced epistemic gaze, that is, a “dialectical advance towards adequate knowledge” (Bourdieu, 2003, p. 13). Bourdieu’s epistemic breaks enable researchers to be reflexive about their own epistemic position. He refers to three distinct types of epistemic breaks, relating to ‘three degrees of vigilance’ (Bourdieu, 1990, p. 20):

- *The epistemic break from common sense or everyday life understandings.* This entails breaking from the practical knowledge, based on everyday experience, that guides individuals to orientate their actions in certain ways and to uncover the underlying generating principles of such actions (Bourdieu, 1990, p. 20). However, Bandura (1977) illustrates in his theory of learning by trial and error, and the efficacy of positive responses in the process, that these forms of knowledge cannot be neglected.
- *The epistemic break from the objectivist and subjectivist reductionism.* For Bourdieu (in Bourdieu & Wacquant, 1992, pp. 104–107), subjectivity is neither determined by, nor free from, objective conditions. The outcome of this second type of break is the possibility of a “science of dialectical relations between objective structures ... and the subjective dispositions within which these structures are actualised and which tend to reproduce them” (Bourdieu, 1977, p. 3). Bourdieu (in Bourdieu & Wacquant, 1992, pp. 104–107) insists that researchers need to recognise their personal biases—their values, experiences and constructions—and acknowledge that these, together with the historical and ideological moment in which they live, influence the direction of their research. We maintain that this

reflexive positioning should also take into account that even the very conceptions of subjective and objective conditions, and the dichotomy that they propose, must be subjected to conceptual interrogation. Utilising Bourdieu's theoretical perspective to inform data analysis, then, requires researchers to look at the dynamic interaction between individuals and their surroundings, and situate their accounts within a larger historical, political, economic and symbolic context.

- *The epistemic break from 'theoretical knowledge'*. The third type of break requires researchers to break from theoretical knowledge, whether subjectivist or objectivist. This refers to the need to pay attention to the practices of social agents in the field and represent them as truthfully as possible (Bourdieu, 1990, p. 21). This is because:

... separated from the realities of the economic and social world by their existence and above all by their intellectual formation, which is most frequently purely abstract, bookish, and theoretical, [researchers] are particularly inclined to confuse the things of logic with the logic of things. (Bourdieu, 1998, p. 2)

It is important, then, for critical sociologists to cast a professional eye over the world of their origin, and to understand and deconstruct their own position in both the research and the academic fields. In doing this, research becomes a process of self-analysis in which researchers attempt to grasp, at a conscious level, their own dispositions, in order to make sense of those with, or upon, whom they conduct their research.

With reference to the analytical framework described above, we scrutinise recent South African scholarship and identify key insights that point to alternative epistemological and methodological pathways and their implications for future research. We focus on four areas: (i) the critique of essentialism and theoretical reductionism in South African radical theories of the 1970s; (ii) epistemological promises arising from the advent postmodernism in later post-structuralist debates; (iii) political and emancipatory epistemologies underpinning anti-apartheid and transformative intellectual discourses of the 1980s; and (iv) the potential that these have for a sound intellectual gaze across difference.

A common feature of the four areas of scholarship listed above is that, although they have attempted epistemological breaks, they are still far from accounting for the complexities of social difference, experience and meaning, effectively. We argue that this is due to an inability to effect the fundamental paradigm shifts and epistemic breaks required to move African scholarship from its position as an extension of Western scholarship to a position of partnership in the global discursive context. In each case, the analytical strategies adopted remain within the parameters of the same theoretical frameworks they challenge or criticise.

In this analysis we take cognisance of the centrality of alternative epistemologies in reasserting the transformative potential of knowledge. We argue however that, to be effective, such epistemologies cannot be thought about outside the racialised and

gendered structure of social relations within the South African social and intellectual fields. We concede, however, that while not innocent, social markers of difference and privilege are not innate but are the result of socially constructed boundaries between individuals or social groups (Cross & Naidoo, 2012, p. 229). As Bernstein (2000) states, the boundaries between different social groups and categories of knowledge are a function of power relations: “power relations create boundaries, legitimise boundaries, reproduce boundaries between different categories of groups, gender, class, race, different categories of discourse, different categories of agents” (p. 5). This is where we locate our anti-colonial social justice project of research and knowledge decolonisation.

#### ESSENTIALISM, UNIVERSALISM AND THEORETICAL REDUCTIONISM

While neo-Marxism emerged in the 1970s as an alternative to the poverty of theory that characterised both Afrikaner nationalist and liberal scholarship in South Africa under apartheid, it displayed problems of its own. The over privileging of certain subjects as points of departure and change agents in social analysis soon revealed its limitations. Worth mentioning in this regard are two theoretical strands within the South African radical theory that dominated southern African debates in the 1970s: neo-Marxist and Black Consciousness scholarship. Each strand had its ‘privileged subjects’ that were the only driving force with all explanatory power for social change. For neo-Marxists, only the working class could carry out a truly revolutionary mission, regardless of its social and ideological differences (Wolpe, 1972; Johnstone, 1970, 1976; Trapido, 1970; Legassick, 1974). It was also through its actions and experiences that social change could be explained and understood. For Black Consciousness Movement (BCM) scholars, such a historical and intellectual mission lay in the hands of the black working class only, given its unique experiences under colonialism and apartheid (Biko, 1979; Alexander, 1986; Motlhabi, 1984).

Epistemologically, two important aspects divided the two intellectual traditions, neo-Marxism and Black Consciousness scholarship. The first aspect was whether the differential categories of race or class were appropriate analytical categories to understand the complexity of South African society. The second was whether a preoccupation with the working class, or the black working class, specifically, as privileged subjects was a sound starting point, analytically. The analytical excitement around these issues did not last long, however, and important insights soon emerged. It became clear that the problematic of privileged subjects had serious analytical limitations, particularly when students superseded the working class in the struggle for political emancipation (Cross, Carpentier, & Ait-Mehdi, 2008, pp. 15–16). It was evident that the focus on privileged subjects, in both ontological and epistemological senses, had to be replaced. As Laclau and Mouffe (1985, p. 70) correctly indicate, no social movement or social category can be taken, a priori, as having a revolutionary mission by virtue of its class nature, and certainly also its race or age affiliation.

The theoreticism that dominated these traditions curtailed sensitivity to the human dimension, more specifically, to the real life experiences of people as articulated by social theory. Analysts—particularly revisionists—came to the realisation that the universalising, totalising or essentialising mode that characterised their social analyses precluded the narrative of human experience, which was the more appropriate foundation for theoretical explanation. Essentialism is a form of theoretical reductionism that emerges when researchers fail to see the established order as problematic (Bourdieu, 1988) and when justifications for the prevailing social order are masked by theory (Bourdieu, 1990), offering explanations of social life that are removed from rigorous engagement with social practices. In developing his own concept of theoretical knowledge, Bourdieu sought to overcome the opposition between “theoretical knowledge of the social world as constructed by outside observers and the knowledge used by those who possess a practical mastery of their world” (Postone LiPuma & Calhoun, 1993, p. 3). He accorded validity to ‘native’ conceptions, without simply taking those conceptions at face value. He encouraged researchers to break away from theoretical knowledge—whether subjectivist or objectivist—because of its tendency to abstract reality, and “to confuse the things of logic with the logic of things” (Bourdieu, 1998, p. 2), as mentioned earlier. Revisionist critics in South Africa called for an epistemic break from such tendencies, which they termed ‘history without passion’ or, in this case, ‘theory without passion’ (Cross et al., 2008, p. 6). The alternative meant paying attention to the practices of social agents in the field and representing them as truthfully as possible (Bourdieu, 1990, p. 21).

The opposite of theory without passion is an epistemological approach that challenges research that neglects the dialectic between the theoretical (made up of pre-determined and fixed ideas) and the empirical (real life experiences of people in their diversity). It is important for theorising ‘what is really going on’. Revisionists charged prevailing radical scholarship epistemologies of de-emphasising dimensions of experience by privileging imagined or pre-conceived categories, devoid of historical rootedness. Human experience in all its diversity and complexity can sometimes be absorbed and diluted into fixed concepts such as productive forces, relations of production, and capital and class struggles, which, under oppressive apartheid structures, failed to account for the daily experiences of the working class as a group and as individuals. In highlighting the need to account for social experience in social theory, the revisionist critique supported an epistemology with the potential to “denaturalise and to defatalize the social world to destroy the myths that cloak the exercise of power and the perpetuation of domination” (Bourdieu & Wacquant, 1992, pp. 49–50).

Essentialism makes it difficult, if not impossible, to account for the nature of the intersections of race, class, gender, and other forms of difference, including their manifestations in lived experience. These intersections assume different forms depending on the context (in some cases, race takes precedence over class but in others gender or ethnicity may be dominant, and so forth). The effectiveness of a particular

epistemological or methodological practice depends on how this complexity is conceptualised and understood. Revisionist contestations of essentialism opened space for two important discursive developments, namely postmodernism and popular emancipatory discourses.

#### EPISTEMOLOGICAL PROMISES OF POSTMODERNISM

Epistemologically, postmodernism is significant in the South African context for two reasons. First, by drawing attention to the notion of social plurality as a more dynamic analytical concept (Ranuga, 1982), it legitimised the call to supersede the privileging of the working class (in neo-Marxist analyses) and the black working class (in Black Consciousness perspectives), as the sole agents of a radical social transformation in South Africa. Second, it drew attention to notions of different knowledges, plurality of knowledges, and multiple locations of knowledge, and hence multiple epistemologies. This recognised and legitimised subjugated knowledges and previously silenced voices. It brought to the forefront the idea that “all groups have a right to speak for themselves, in their own voice, and have that voice accepted as authentic and legitimate” (Harvey, 1989, p. 48), and drew attention to, in Spivak’s words, ‘other worlds’ and ‘other voices’, as legitimate sources of knowledge (Gale, 1997, p. 104; Spivak, 2001).

With postmodernist perspectives, the boundaries of knowledge were widened to include informal processes of knowledge production by ordinary people or non-professional agents, that is, practices of knowledge production formerly outside the academy or discarded by it as unscholarly. This held a particular emotional appeal in Africa, where, in a society plagued by high levels of illiteracy, scholarly work that privileges the written word is problematic. Cross (1998, p. 3) argues that a radical review of the existing methods and processes of knowledge production recognised by the academy was warranted. Just as the Marxist tradition had in South Africa, postmodernism took itself very seriously, almost going so far as to claim for itself the status of ‘meta-narrative’, with the potentially constraining implications that held.

#### EMANCIPATORY EPISTEMOLOGIES FROM POPULAR DISCOURSES

What has been neglected in recent literature, is the impact of the people’s education movement on South African scholarship. The 1976–1980 school crisis led to a call for ‘people’s education for people’s power’ in 1986 as a counter to apartheid education and a vision for an alternative education system. The mass democratic movement foregrounded the centrality of ‘people’s education’ or ‘people’s power’ in the ideals of social justice and emancipation (Sisulu, 1986). This was a shift from an emphasis on struggles of resistance to struggles of transformation. The people’s education movement placed control of power at the centre of the struggle against apartheid and called on members of academia to participate in the struggle for power. This stimulated discourses of ‘power’, ‘empowerment’, ‘conscientisation’



and ‘emancipation’ among scholars. These discourses encompassed the idea that critical social researchers should, as knowledge practitioners, be committed not just to knowing, but also to transforming, changing the world, and combating discrimination and oppression (Figueroa, 2000). The epistemological implication was that engaged scholars had to know, from the outset, that their task was also a political one, involving not simply telling the truth about the world, but also actively engaging in its transformation and dealing with the problematic of epistemological and cognitive justice in their work. They were to be not only critics, but reconstructors as well.

The increasing appropriation of ideas of power, empowerment, conscientisation and emancipation from the mass democratic movement precipitated theories from below, or bottom-up theories, exemplified by the ascendance of more vibrant and diverse social analysis regimes, in the 1980s, over the reductionist economism of the 1970s. Tripp (1998) indicates that, by asking “whose interests are being served and how” (p. 37) in social arrangements, socially critical researchers inaugurated a particular form of engaged scholarship that sought to “work towards a more just social order” (Lenzo, 1995, p. 17), “in which the subordinated are invited to take control of their lives and change the conditions which have caused their oppression” (Beder, 1991, p. 4). The impact on the intellectual field was felt through an emphasis on participatory research methodologies and stakeholder consultation, and, at the level of knowledge production, through a focus on the lives of ordinary people and their cultural, ideological and political identities and loyalties.

In South Africa, the National Education Policy Investigation (NEPI) first translated the discourse stimulated by the people’s education movement into a research project in the late 1980s. In this initiative, a partnership between researchers and political activists, drawn from the mass democratic movement, developed policy options for a post-apartheid South Africa. The assumption was that truthful and legitimate knowledge for policy development could only be generated with the active participation of both ordinary and politically-informed members of society. This participation could be through involvement in relevant research projects or relevant consultative forums where researchers and activists negotiated the purposes of education policy, associated political and conceptual frameworks, as well as methodological and process issues.

A number of reports and publications were generated under the people’s education umbrella, and various initiatives and activities were undertaken by teachers and students to redirect the South African knowledge and curriculum systems. We argue that, beyond these initiatives, what emerged from the people’s education movement was a *political epistemology* grounded in the principles of human rights, democracy and social justice, which took the value of stakeholder participation and consultation in knowledge production for policy seriously. It marked a major paradigm shift in social research and the educational policy domain in South African. Initial government policy initiatives, and the research practices that informed them, were founded on these principles. Their increasing neglect under the dominance of a



neo-liberal regime, in and outside government, is a worrying phenomenon and a major threat to progressive scholarship.

REVISITING CRITICAL SCHOLARSHIP IN SOUTH AFRICA: KEY  
EPISTEMOLOGICAL CHALLENGES

In the previous sections, we discussed how important epistemological and theoretical challenges, with profound implications for social research in post-apartheid South Africa, emerged in critical scholarship. The first challenge was the need to work through, and with, categories of difference warranted by neo-Marxist analyses. The second was the centrality of lived experience to social theory. The third concerned marginalisation and symbolic violence in knowledge representation, which was at the centre of epistemologies rooted in the people's education movement. This related to the researcher's habitus and positionality.

*Deconstructing Apartheid Classifications: Categories of Difference, and  
Conceptual Ambiguity and Elusiveness*

As already illustrated, categories of difference, particularly race, are highly contested in social analysis and critical scholarship. The questions are whether, or how, social researchers can work with, work through, or work without, the existing differential categories that are deeply entrenched in South African social life, and what epistemologies are deemed suitable for such a challenge. May (2010) discusses the creation of categories as follows:

Creating categories is what we humans do both consciously and unconsciously in order to understand the complex world around us ... Through language (words, concepts, theories) we order, make sense of, and provide labels for things, people and experiences, and we tend to take these everyday understandings of the world for granted ... These categories do not however correspond directly to a reality 'out there' but are rather the product of human embodied reason. (p. 431)

Under apartheid, South Africans were officially classified in their identity documents as African, Coloured (of mixed race), Indian or White. This classification remains as a monitoring mechanism in many sectors. Many scholars also tend to take these categories as their point of departure for analysis (Kallaway, 1984). However, the persistence of apartheid classification in official documents is an object of such fierce contestation that a national conference on apartheid categorisation was held at the University of the Witwatersrand in 2010 to explore the implications of such practice in the context of the post-apartheid non-racial project. Regrettably, the debate was highly political and ideological, and paid little attention to the epistemological dimensions of these categories. In the following section, we briefly reflect on particular epistemological implications.

Brubaker and Cooper's (2000, p. 4) interesting distinction between the *categories of social and political practice* and the *categories of social and political analysis* used by social scientists, is of importance to our analysis of apartheid categorisation. In this regard, scholars in South Africa are divided into two camps. There are those who work in terms of *categories of practice*, that is, categories of "everyday social experience, developed and deployed by ordinary political actors, as distinguished from the experience-distant categories used by social analysts" (Brubaker & Cooper, 2000, p. 4). Whether used only as monitoring mechanisms in equity redress or affirmative action strategies, or in daily social life, apartheid classification categories inevitably enact social practices that reproduce apartheid social relations. Because, as Audre Lorde's (1984, pp. 110–114) words capture so well:

... the master's tools will never dismantle the master's house. They may allow us to temporarily beat him at his own game, but they will never enable us to bring about genuine change... Racism and homophobia are real conditions of all our lives in this place and time.

Other scholars advocate the use of categories of difference as *categories of analysis* central to capturing patterns and trends in the transformation or change processes. For them, without these categories, it is not possible to determine whether transformation strategies produce desired results. An emancipatory dimension is thus attached. The possibility of both categories of analysis and categories of practice appropriating new meanings is incontestable, as categories are never fixed but undergo constant changes as a result of dialogue, dispute, and power struggles within the intellectual field (Cross & Naidoo, 2012, p. 229). For example, highly contested under apartheid, the concept of culture in cultural diversity has become a source of social and cultural enrichment, to be recognised, respected, acknowledged, enabled, celebrated, protected and promoted, through proactive diversity strategies.

We argue, however, that, epistemologically, claims about the emancipatory potential of categories of difference may be misguided, unless certain theoretical premises are taken into account. There is a strong connection between the effects of the practical and analytical uses of categories that can hardly be ignored. The act of categorisation in social analysis is never neutral (May 2010, p. 431); it has real consequences in the lives of individuals. Categorisation tends "to homogenise groups and create a discursive illusion that members of a category share more in common than they in fact do, which hides the variety of interests, social positions, and identities ascribed to the group by the category" (Cross & Naidoo, 2012, p. 231). For example, it is not a given that all white people enact racist behaviour or that only white people are capable of racist behaviour. These important aspects of categorisation have profound epistemological implications in social research. We thus argue that no specific social category can be, a priori, awarded political and analytical privilege in a democratic order by virtue of social difference. However, as we will show in the following section, the lived experience shaped by social categorisation remains a

central epistemological, methodological and ethical consideration. Further, we argue that the act of categorisation as affirmation of power and interest entails subtle forms of violence, symbolic domination or symbolic violence (Bourdieu, 1992, p. 183), aspects which we expand on later in this chapter.

*Acknowledging the Epistemological Centrality of Experience* The importance of shared experience relating to race received considerable attention from the Black Consciousness Movement (BCM) (Biko, 1979). The attitude and positioning of black people in the liberation struggle was characterised by their distinctive experience as the colonised and oppressed under colonialism. For Biko (1979) for example, blacks needed to decolonise their minds and throw off the inferiority complexes inculcated by colonialism in order to liberate themselves. The unique black experience was given specific attention in BCM sociological approaches. A more nuanced approach to experience came from BCM Marxists who assigned a privileged political role to the black working class by virtue of its common experience under oppressive colonial and apartheid regimes. While these theoretical traditions paid attention to the role of experience in the search for privileged subjects capable of fulfilling a revolutionary mission, it was only with the increasing influence of feminist perspectives that the epistemological centrality of experience came to be recognised (Harding, 1987, 1991, 1998; Eichler, 1988; Fawcett, 2000; Maynard, 1994; Narayan & Harding, 2000; Stanley & Wise 1993; Williams 1996).

Acknowledging that feminist theories place relations between political and social power and knowledge at centre-stage, Fredericks (2009, p. 1) identifies three main claims made by feminist theorists: (i) knowledge is socially situated; (ii) marginalised groups are socially situated in ways that make it more possible for them to be aware of certain things and ask questions about them than it is for the non-marginalised; and (iii) research based on power relations, in particular, should begin with the lives of the marginalised.

Experience is a vehicle through which the presence of the marginalised can be acknowledged, their discourses, voices and meanings can be articulated, and their involvement in intellectual production, through self-representation or, ultimately authorship, can be safeguarded in social theory. There have been ongoing discussions, forums, workshops and conference sessions to critique the colonising, marginalising and disempowering practices of prevailing research methodologies. The American feminist philosopher Sandra Harding, who shared her ideas at such gatherings with South African scholars, has been influential in this context. Harding (1998) calls for the use of epistemologies rooted in the experiences of the marginalised because:

[s]tarting thought from the lives of those people upon whose exploitation the legitimacy of the dominant system depends can bring into focus questions and issues that were not visible, 'important,' or legitimate within the dominant institutions, their conceptual frameworks, cultures, and practices. (p. 17)

Unfortunately, these debates have not provided much beyond critiques of Western research paradigms. The realisation of methodologies that are accountable to the marginalised remains a challenge.

We argue that, epistemologically, experience plays a critical role in the research process under social plurality in at least two main respects. First, it is through experience that Others (objects of study) are able to understand and attach meaning to their own lives. As Jarvis (1987) notes, “there is no meaning in a given situation until we relate our own experiences to it” (p. 164). Second, it is through a lived experience of doing things and being with others that a researcher’s habitus and personal, possibly stereotypical, perceptions of others can be confronted and transformed. We prioritise the role of lived experience, rather than categories of difference, in researching the ‘truth about reality’ or the ‘truth about Others’ (Maton, 2009, p. 60). In this regard, rather than difference per se, we consider ‘experience of difference’, that is, how both subjects and objects of social research experience and respond to the discourses of difference in their lives, voices and ‘silences’—to the researcher’s own selection of facts and meaning—as a key epistemological construct. In addition, one’s own habitus is itself structured through embodied and situated experiences of our world. We refer to this as ‘silent pedagogy’.

Given the researcher’s closeness and intimacy with his or her own experience, a degree of vigilance, indeed an epistemological break, is always required: the patch one is standing on is the most difficult to see. Excessive proximity constitutes as much of an obstacle to scientific knowledge as excessive remoteness (Bourdieu, 1988). Given that we are generally indifferent or more blind to the constructs in which we ourselves are involved, it is necessary for a researcher to “exoticize the domestic, through a break with his [or her] initial relation of intimacy with modes of life and thought which remain opaque to him [or her] because they are too familiar” (Bourdieu, 1988, p. xi).

*Accounting for Marginalisation and Symbolic Violence in Knowledge Representation* As argued elsewhere, where multiple knowledges exist, the presence of some is very often concealed or discarded, either by an over reliance on universalising or essentialising theories, or under the logic of the dominant discourses of power and interest (Cross, 2015, p. 1). According to Livingston (1992), the dominant discourses of power and interest operate “to restrict argumentation and to bias the possibilities of persuasion” (p. 223). Under such intellectual circumstances, researchers tend to reify what they are used to seeing in their own social and intellectual experiences as ‘truthful’ knowledge, replicable in all contexts, hence the danger of misrepresentation in other contexts. Indeed, while perceived difference may mystify or blur the research object or social phenomena, the silences it triggers in intellectual representation is more damaging. Audre Lorde (1984) emphasises this aspect when she says “it is not difference that immobilises us, but silence. And there are so many silences to be broken” (p. 44). Silences are directly connected to one’s own social and intellectual experience, which most often appears to be harmless.

As a researcher selects, interprets and represents data, the participants' intended meanings inevitably become distorted and reshaped (Burke, 2002), very often without the researcher acknowledging that his or her interpretation is partial, limited, and possibly, biased (Walker, 1983). The self-criticism of practice that characterised radical scholarship throughout the 1980s and in the early 1990s has given way to what Torres (2011, pp. 184–185) refers to as the new-liberal 'common sense', where existing paradigms, theories and methodologies are unquestioned and taken for granted, amounting to a positive normalisation of abnormality. This is aggravated by an increasing scepticism about the prospects of critical scholarship. One could speculate that the excessive amount of 'navel-gazing' at both individual and national levels was behind the decline of critical scholarship during the political 'honeymoon' in the years that followed the establishment of democratic rule in South Africa. We refer here to excessive contemplation or reflection on one's own world and experiences (very often mythologised as unique) at the expense of a wider view (the community, country, region, continental and global worlds) where similar experiences might have occurred.

#### THE RESEARCHER'S HABITUS AND AGENCY

We use Bourdieu's concept of habitus in this chapter to refer to the dispositions and predispositions acquired by researchers through training or socialisation in the dominant circles of the intellectual field, which set unproblematically, and do not question, the canon in scholarly practice. We also consider the entrenched forms of knowing and understanding of the world that Jansen (2009) refers to as *Knowledge in the blood*. Some scholars refer to knowledge derived primarily from the experience of everyday practice as embodied knowledge. Plato (1987, pp. 317–325) compares it to "shadows cast on the wall" that prevent one from knowing the truth about others. Applying Plato's *Allegory of the Cave* to knowledge that one carries in the blood, individual researchers, as 'knowers', could be considered immobilised prisoners (chained by knowledge in the blood) in a dark cave. In this constrained state, they take the knowledge in the blood (shadows) as objective representations of reality. Hence the need to confront one's own habitus so that the 'truth' about others can be revealed.

Contrary to what proponents of Fundamental Pedagogics advocate, it is not possible, as a social researcher, "to step outside [one's] own humanness by disregarding one's own values [and] experiences" (Guba & Lincoln, 1989, p. 67). Depending on our social position and positionality in the intellectual field, we tend to read social experience, habitually, through the lens of our own theoretical types, stereotypes, symbols, and beliefs—the knowledge acquired through social and/or academic experience. As Figueroa (2000) declares, "if research cannot be value neutral ... if it is to be ethical, it must be value critical" (p. 88). Admittedly, because we participate in various fields at the same time, the logics of these different fields may be in conflict. It is a researcher's responsibility to 'come clean' about personal

predispositions and feelings, to declare his or her values and be fully aware of the taken-for-grantedness of such values, and to interrogate personal research habitus. The researcher's habitus must be unearthed, clarified and questioned, because of the significance of both individual and collective agency in social research.

#### CONCLUSION

Researching the Other requires awareness of the dynamics and processes of marginalisation of people through social categorisation, and the implications of knowledge representation for the research subjects. Such awareness poses political, ethical, theoretical and methodological challenges for researchers, which necessitate appropriate epistemological breaks and vigilance. There is a need for scholars to backtrack on occasion, and radically re-evaluate their worldviews and constructs about social life in a society as diverse and rapidly changing as South Africa. The emerging picture of South African critical scholarship is varied and somewhat intriguing. Intriguing because, although located on the African continent, by virtue of training and intellectual socialisation, South African critical scholars occupy an intellectual space dominated largely by western epistemological and theoretical discourses. Consequently, their intellectual projects have focused primarily on searching for epistemological and theoretical appropriateness through *adaptation*, with very little effort being expended on searching for epistemological *alternatives*. Emerging Africanist, Africanisation and knowledge decolonisation discourses, recently appropriated by South African student movements, are commendable for their efforts to deconstruct and re-contextualise. This is the reality in which researchers' epistemological breaks and forms of vigilance should be understood.

'Privilege' in social location, analytical emphasis, and in critical scholarship in the intellectual field, has been a major constraining factor limiting the possibilities of alternative epistemological projects. Given the apartheid legacy in South Africa, critical scholars occupy a largely privileged position within what remains a racially and gender-skewed hierarchy of knowledge, where globally prominent discourses dominate intellectual activity, and reflect in the privileging of certain discourses—neo-Marxism, post-postmodernism and feminism. This chapter considers these particular locations, and the structures of social relations that reproduce them, as fundamental considerations in seeking meaningful epistemological redirection.

The emphasis has been on the search for privileged subjects capable of carrying out the revolutionary mission, geared towards the interests of the oppressed masses, against the colonial and apartheid legacies. For neo-Marxists (also known as Charterists), it is the working class. For Africanist/BCM neo-Marxists and protagonists of colonialism of a special type, it is the black working class. For feminists, it is women. For political activists, it includes new historical subjects such as students, gays and lesbians in emerging post-modernist and emancipatory discourses. Overall, the question still remains whether a privileged location in the intellectual field (and consequent intellectual positioning), privileged discourses and



theories, and the search for privileged subjects, constitute sound points of departure for meaningful epistemological breaks.

A general implication of the argument presented in this chapter is that researching the Other is essentially a contextual matter. Consequently, the space we reserve for critical agency has profound implications for the way we prepare researchers, because critical agency operates within established boundaries of political, ethical and social responsibility, and requires awareness of the cultural values that underpin social life in society.

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