(Re)thinking the disciplinary relationship between the researcher and object of study in educational practices in the Brazilian context

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Abstract

This work investigates the disciplinary relationship between the researcher and object of study in educational practices in the Brazilian context. I apply Foucauldian analysis, intersectional paradigm, and politics of citation to understand historical and personal events in Brazil, as well as their epistemological background: the Brazilian positivism. I discuss how Brazilian positivism has been impacting political decisions and educational practices in Brazil, disciplining the type of relationship researchers have with their object of study. I finish this paper arguing that such positivistic relationship is not possible anymore due to political and educational transformations in our society.

Keywords: Brazilian positivism, Foulcauldian analysis, intersectional paradigm, politics of citation.

Introduction

In this chapter, I explore the disciplinary relationship between the researcher and object of study in educational practices in the Brazilian context. I situate research and similar activities as educational practices, considering its inherent educational process for the researcher and its educational outcomes related to sharing results and progressing science. I begin my discussion with a brief description of events that marked my academic life in Brazil, which culminated in a 'last straw' that initiated a series of reflections and research. Then, I present the analytical tools of this investigation: Foucault's analysis, the intersectional paradigm and the politics of citation. I will apply them to understand historical and personal events in Brazil as well as their epistemological background – Brazilian positivism. I continue the discussion presenting how this perspective has been impacting political decisions and educational practices in Brazil, disciplining the type of relationship researchers have with their object of study. I finish this paper arguing that such positivistic relationship is no longer possible due to political and educational transformations in our society.

The reflection process that the philosophy of education brings for educational sciences is important because it opens questions about hidden premises of research and examines the values affecting academic practices (Ruitenberg, 2010; Tillapaugh & Nicolazzo, 2014). It claims from the educator-researcher to contemplate one's own process of reflexivity while inquiring and raising hypotheses. It requests investigations not only about social and historical backgrounds but also personal psychological, cognitive and emotional mechanisms that affect research. Vokey (2009) contributes to this discussion stating that there is no context-free epistemological perspective, 'Rather, we engage in philosophical inquiry equipped (and sometimes saddled) with assumptions and interests shaped by particulars of our personal biographies, social locations, political contexts, and more' (p. 340).

Based on these considerations, I developed this chapter inspired by the 'me-search' approach influenced by the scholar personal narrative (Jones, 2015). This approach gives voice to the author's experiences to test hypotheses and accomplish personal inquiry. Moreover, I integrated my-self, my academic background and the social milieu where I come from – North-eastern Brazil – one of the poorest and 'blackest' regions of the country (IBGE, 2007) – in the process of this

investigation. My final goal was to express the relationships between my writing process, the personal dimensions of this investigation and its outcomes (Coffey, 2001).

The 'last straw'

In 2016 the master's thesis defence of a colleague constituted for me the 'last straw' from a series of events during my academic life in Brazil. Her thesis was highly praised by her supervisor and opponents, but still there was a criticism about her involvement, as a researcher, with her field of research – what the specialists pointed to as a bias mistake. Her research approached how the human values of an educational programme in poor rural communities from North-eastern Brazil influenced the students' human values who engaged in this educational programme (Barbosa, 2016).

This kind of criticism that caught my attention can be referred to as what theorists recognise as positivism's ideal of what science should be: neutral, naturalist and empiricist. According to Trigg (2001), this philosophical approach accused personal emotions and values of making the researcher blind in the face of reality, damaging the rational scientific method. Following the author, positivism's influences on human sciences determined how researchers should deal with the object of study: they should investigate only facts and not involve emotions in the inquiry process because the latter are not logically deduced and were considered a threat that could hurt the legitimacy of human sciences.

What was so intriguing to me was the fact that the professors who brought up this kind of accusation against the involvement of the researcher with her object of study are well-known in that Brazilian University for being critical of positivism. By 'well-known' I mean that in lectures, meetings and publications, the teachers commonly accused positivism of an obsolete comprehension of science. These kinds of statements fit how Lacerda (2017) described the common reaction of Brazilian academic circles against positivism, marked by a strong negative criticism but without any further contextualised reflections and discussions.

However, positioning myself as a researcher, I investigated what was behind the contradiction between discourse-practices: on one side, positivism is considered

outdated and detrimental to human sciences; on the other side, a master's candidate's research is criticised from the powerful position of its evaluators because the researcher was emotionally involved with the field of study. I needed to delve into the history of such a powerful argument, that is, *the researcher cannot be involved with its object of study*. For that purpose, I equipped myself first (hopefully I didn't get too saddled) with my inquiry tools: Foucault's analysis, the intersectional paradigm and the politics of citation.

Analysing human sciences as a social phenomenon to understand the power struggles that constitute them

According to Trigg (2001), 'instead of trying to find out timeless, abstract principles, we look at the strategies that are actually adopted in different times and places' (p. 25). This practical principle of some trends in the philosophy of science developed many ways of studying the conditions, the devices and tools and the values and motives of scientists throughout centuries. Foucault is one philosopher who studied science as a social phenomenon, precisely, as a discursive and powerful practice. His studies about the *Archaeology of Knowledge* and *Genealogy of Power* helped me to understand my inquiry – without the pretension of exhausting it.

The methodology of *Archaeology of Knowledge* (Foucault, 2007a) tries to understand the conditions of possibility, i.e. the historical, political and social breaks of a social phenomenon, which in turn allow the production of different types of knowledge, discursive practices and effective power relationships. At the same time, the archaeological analysis proposes to find the regularity of speech, here understood as the necessary conditions for the appearance of a type of discourse-practice and, consequently, the exclusion of others.

Complementarily, the *Genealogy of Power* (Foucault, 1979, 2007b) presents a study in which individuals are not full owners of their own subjectivity. Foucault highlights that institutions, such as prisons, industries and schools, are constituted by power divisions and unbalances 'immanent' to capillary social relationships. Being part of social institutions and occupying a social position means that individuals exercise power by a set of devices that sometimes are beyond the

knowledge and control of the subject. This power exercise is not only negative in the meaning of oppression or denial, but rather positive, because it produces knowledge-power devices, as discursive operations, in an attempt to maintain its social permanence (Foucault, 1979, 2007b; Levine-Rasky, 2007).

According to Foucault, some of these institutional devices, named by him as discipline, engaged in studying the individual bodies from specific social groups, not only to repress, but also to produce their subjectivities. This means, according to Miller (as cited in Levine-Rasky, 2007), that power also cultivates subjectivity by producing knowledge about it. These discipline devices are carried out through various strategies with different goals, such as specifying and ensuring the position of individuals, and groups of individuals, in a well-structured hierarchy through data collection, observations, classifications, reports, exams or other qualifications of the subject. It allows, through its 'scientific reports', that the examined individuals have been characterised, which leads not only to a detailed description of them, but also to a production of their desires, fears, abilities, etc. – in sum, their subjectivities. The documented knowledge becomes an instrument of control over individuals who are subject to a power of registration, creating a positive economy of human behaviour (Taylor, as cited in Levine-Rasky, 2011). For example, it has already been well discussed in the sociology of education how schools can be analysed as a site of discipline and surveillance, where students are positioned as docile bodies, and discourses about their behaviours are created as knowledge-power devices (Levine-Rasky, 2007).

However, considering power as an action accomplished between subjects in asymmetric relationships, the analytics of power points out that it can be exercised from above and below, which means it circulates across micro social networks (Foucault, 1979, 2007b; Levine-Rasky, 2007). 'The problem is not who has power, but how power is practiced to effect political and social advantage. It's a question of position and of positioning' (Levine-Rasky, 2011, p. 245). Hence, Foucault's analytics of power led me directly to the next theoretical tool that also helped me to enrich my research: the paradigm of intersectionality.

This term was first used by Kimberlé Crenshaw to discuss the particularities of the feminist fights of black women, which were underrepresented by the common image of women being white and blacks being men during the 1980s (Yuval-Davis, Kannabiran & Vieten, 2006). Since then, the term has become popular, and its

premises were developed to analyse the interrelationships of gender, class, race and other social divisions in the dynamics of privilege and oppression (Davis, 1983).

Intersectionality brings the postmodern awareness that there is no 'pure position' such as oppressor and oppressed established through unbalanced power relationships, which is confluent with the previous analysis of Foucault (Levine-Rasky, 2007, 2011). It highlights that the interplay of power cannot be grasped with separate units of positions (Mitchell, 2014) but rather analysed through the consideration of specific social 'positionings' and identities, such as race, class, gender, age, sexual orientation, etc. Also, it seeks how these positions intermesh and are connected to belonging groups, which produce and exercise different power relationships within and with others (Yuval-Davis, 2006; Yuval-Davis et al., 2006). Yuval-Davis (2006) stresses that the intersectional approach does not 'add' separated social identities to produce an 'oppression sum' in order to avoid internally homogeneous social categories. 'Instead, the point is to analyse the differential ways in which different social divisions are concretely enmeshed and constructed by each other and how they relate to political and subjective constructions of identities' (Yuval-Davis, 2006, p. 205).

Moreover, the intersectionality paradigm contributes with epistemological discussions regarding educational practices, such as research, when it comes to the influences of the researcher's 'social positioning' (worldview, life experiences, family background, identity), his/her academic community and their procedures of data collection and analysis. For instance, Tillapaugh and Nicolazzo (2014) implemented the methodology of backward thinking to explore the relationship between identity, epistemology and research design, showing 'how power mediates not only how one approaches research and the research process but the extent to which one's research is viewed as valid, appropriate, and useful by others in one's respective field of study' (p. 117).

Considering these reflections and using the analytical tools described above, I explored the inquiry *what is the history of the discursive practice of 'trustable distance' between the researcher (agent/subject) and field of research (participant/object) in the Brazilian context?*

(Re)looking at who has been doing human sciences in the Western world

I would like to bring some historical background to understand how some discursive practices of the end of the 19th and the beginning of the 20th centuries were fundamental to ground what we call today human sciences and education in Brazil. For instance, this discursive heritage still affects the evaluation of educational research, considering it reliable (or not) depending on how much the researcher is involved with the study field (Tillapaugh & Nicolazzo, 2014).

Besides the previous brief explanation of what the premises of positivism are, and without any intentions of analysing this topic deeply in its recent developments, it is always important to stress the Vienna Circle as an historical mark. The group of philosophers who took part in it claimed what they termed 'scientific world-conception' and its goals to build a unified science, which should follow logical analysis based on empirical, neutral and objective material (Trigg, 2001). Back then, this group had the conditions of possibility (discursive and material power) to point out (if not impose) the guidelines of 'how to do science' and how scientists should relate with their object of study.

What caught my attention during my inquiry process is that in textbooks that I read in my academic formation, there is a broad discussion about what this group said (the discourse content). However, there is a lack of discussion in such course books about who the individuals were that composed the Vienna Circle. More importantly, why had those individuals such influence on the academic field, i.e. the power devices to activate such discourse-practices? In other words, what were the conditions of possibility of those agents to have the discursive appearance and to simultaneously exclude others?

According to Tillapaugh and Nicolazzo (2014), who a researcher is affects the study products because rarely an investigation is made in isolation but rather within a community of scholars that interact in formal (e.g. conferences) and informal (e.g. intellectual café meetings) venues and discuss their work through their own particularities and values. Hence, disciplinary struggles influence the visibility of research: 'power also affects how the research is perceived, the extent to which it is welcomed, by whom it is welcomed, and the access one may or may

not get to publish and/or present in certain venues (Tillapaugh & Nicolazzo, (2014, p. 117).

In parallel to the relationship between identity, epistemology and research design from Tillapaugh and Nicolazzo (2014), Mott and Cockayne (2017) discussed the prevalence of white researchers being cited in the West. Levine-Rasky (2011) is cautious when it comes to defining whiteness, considering historical, economic, cultural and political contexts that gave rise to its social power. Like other racial categories, whiteness is more than a classification of physical appearance; it is largely an invented construct blending history, culture, assumptions and attitudes. In the American case, from descendants of various European nations, emerges in the United States the consensus of a single white race that, in principle, elides religious, socio-economic and gender differences among individuals to create a hegemonically privileged race category (Babbs, as cited in Levine-Rasky, 2011).

Therefore, here, I do not intend to reduce researchers' differences (personal, historical, theoretical, social, etc.) or put all of them into a simplistic bag of 'white people'. If I would do so, I would ignore all the contributions of the intersectionality perspectives to understand the social identities and representativeness that cross people's lives and affect them in different social ways. Besides, simply reinforcing whiteness as a homogeneous 'somatic and "real" social category' and obscuring its internal differences secures its power (Levine-Rasky, 2011).

However, I do intend to highlight the 'white trace' that appears among the scientists and researchers who have traditionally produced research in the Western world. This trace can be the only similarity between them and their work, but even so this speaks loudly about who representatively founded and developed human sciences in the West – which in turn influenced educational practices in Brazil. They brought their values, views and perspectives and discursive devices to what should serve as the model of the scientific human research.

Therefore, the male white traces recognised in traditional research (Mott & Cockayne, 2017) represent who has been doing human sciences since at least two centuries ago and who is producing academic/educational discourses and power devices about what sciences should be. Moreover, as a knowledge-power device, it takes itself as the norm and tries to universalise itself, transforming all other cultures and social positions (women, blacks, homosexuals, the poor, the mentally

ill, children, etc.) in a marginal and peripheral existence that must be examined but kept at a distance from the centre (Foucault, 2007b; Yuval-Davis et al., 2006).

From the politics of citation perspective, Peake and Sheppard (2014) discussed how white male heteronormative citation can establish a narrow and homogenous narrative in a scientific field, excluding other possible works with different perspectives that come from other genders, ethnical groups and sexual orientation. Exactly these other voices would bring the difference and otherness needed to better understand the mechanisms of oppression and overcome them. Therefore, Mott and Cockaine (2017), inspired by Butler, Hooks and others, stated that citation should be understood as a performative practice, that is, as a technology of power that acts to reproduce 'a white heteromasculinist neoliberal academy' (Mott and Cockaine, 2017, p. 11). However, as power device, it can also be used by different actors according to their positionings and performances to break through the norm and bring forward alternative voices to produce sciences and educational practices.

In the next section, I will bring this discussion to the Brazilian context, describing how positivism influenced our modalities of making science and still influences educational practices.

Roots of positivism in Brazil and its disciplinary influence on educational practices today

Positivism had a significant influence on a (diversified) elite group of Brazilian males, emergent middle-class intellectuals, particularly made up of engineers, military circles, liberal professions and public officials. This group staged the Republicanism movement in Brazil at the end of the 19th century (Bhering & Maio, 2010). This movement culminated in the Proclamation of Republic process and affected many political decisions and educational reforms until the 1930s (Silva, 1999). As an illustration, the national flag of Brazil contains the inscription 'order and progress' derived from Comte's motto: 'love as principle, order as the basis, progress as the goal' (Merquior, 1982). Unfortunately, the 'love principle' was taken aside.

In that time, the positivists were divided into orthodox and heterodox groups. The former group followed the global work of Comte, including the religious precepts of the Positivist Church and Apostolate of Brazil (Lacerda, 2017; Silva, 1999). The latter was comprised mainly of technicians focused on applying methods based on observations and measurements of scientific, social, political and educational matters (Lacerda, 2017). In both representative groups, it is not surprising to find the prevalence of heteronormative cis-masculinist, not indigenous and not afro-descendant, members.

Although these circles had different premises, the global group of positivists accused the Monarchy and slavery system of delaying Brazilian progress, they criticised the 'Paraguay war', defended the separation of Church and State and supported progressive international relationships (Merquior, 1982; Lacerda, 2017). At the same time, positivism had a special appeal for Brazilian elites, 'who wanted progress without social mobilization, and therefore found in Comtism an apt rationalization of the concentration of power in the hands of a literate elite' (Merquior, 1982, p. 464). As one can see, positivism carried intricate nuances due to the complex social milieu in Brazil.

Moreover, Teixeiras Mendes, the main writer of the orthodox group, developed a 'social theory of Brazil', stating that each main ethnicity present in Brazil had a specific role for the country's development: the Portuguese group would be responsible for the intellectual and social development, while the African and indigenous tribes would contribute with the fetishist, affective and imaginary aspects of Brazilian society (Lacerda, 2017). These concepts seem quite absurd for our current state of discussion; therefore, the reader must consider them according to their temporal aspect. However, it is not too much to emphasise how these conceptions influenced the popular idea of the role and social positions of each of these groups in Brazilian society during the 20th century.

As an illustration of how positivism influenced the political decision making in Brazil during the first decades of the Brazilian Republic, I mention the creation and development process of the Ministry of Agriculture, Industry and Commerce (MAIC) in 1906. This ministry consisted of a privileged space for the development of a new category of public officials: specialised technicians that intended to apply positivistic principles, such as neutral scientific methods to solve social and

economic problems without the interference of personal and external influences (Bhering & Maio, 2010).

Such impact can also still be seen in different educational practices in Brazil nowadays. For instance, according to Pastana (2007), law teaching in many faculties follows a positivistic model of 'legal doctrines' that carries the perspective of law as a field of rational and infallible practices. Sometimes they are thought of as if they had no internal contradictions, ignoring historical comprehensions of the conditions of possibilities of how these theories developed. Such doctrines permeate law students, who start to believe that by strictly applying legal laws, without any critical inquiry, one can achieve social justice (Pastana, 2007). Related to this field, I cannot avoid raising a rhetorical problematisation: what social actors have the conditions of applying such legal norms, and upon whom do these norms fall in Brazil?

Bringing the discussion to higher education, Brazilian universities have strong European roots. It was only when the royal Portuguese family came to the colony at the beginning of the 19th century that we had our first higher education schools (Fávero, 2006). However, the character of the university was only structured in the middle of the 20th century – and still the access to them was restricted to the minority elite, mainly constituted by men, white and of European descent (Martins, 2002). Similar profile was already pointed out in the positivist elite of intellectuals described previously.

In contrast, subjects who belonged to axial categories such as women, enslaved black people and their descendants, indigenous groups, poor people, etc. had for the most part of Brazilian history strict (if not null) conditions to contribute with the discourses and practices of higher education institutions (for more details about the participation of minorities in Brazilian university life, see Leta, 2003; Tragtenberg et al., 2006; Santos & Queiroz, 2007; Bayma, 2012; Terra & David, 2016). This happened due to a lack of government policies towards them, such as affirmative actions. Hence, these axial categories were mostly considered the 'study object' rather than the 'study agent' in general scientific and educational practices in academia – which does not mean they did not have their own (marginalised) production of knowledge-power.

Finally, after decades of debates, the Brazilian Federal Supreme Court decided on the constitutionality of quotas to university on April 26, 2012. Law 12.711 /

2012 determined the provision of 50% of the places of federal higher education institutions for students coming from public education and with low family income. Also, it assigned the vacancies to the candidates self-denominated as blacks and brown and indigenous peoples (Bayma, 2012; Terra & David, 2016; Tragtenberg et al., 2006; Santos & Queiroz, 2007). For the first time in our society, starting from the second decade of the 21st century, we had a larger number of those minorities at the best universities of the country.

Nowadays, these social groups have interests in studying and educating themselves, their own cultures, habits, rituals and social institutions in the academy. Today, we do not have solely one kind of axial group studying others but a plurality of groups willing to study themselves. In this social context, it is necessary to confront the historical standard of the actors positioned as the ones who were doing human sciences until now and claimed neutrality and little involvement with their 'object of study'. Today, there is a new group of researchers who come from the social institutions and groups that used to be studied, but until now did not act as a research agent.

Final words

Currently, human sciences no longer deal with the classical and simplistic dichotomy of 'man studying man'. Beyond the hidden general set up of white heteronormative patriarchal cis-man studying the Other (Yuval-Davis et al., 2006) – which was a historical condition that allowed a 'safe distance' between the researcher and field of study – now there are more complex and specific settings. The previously unprivileged axial groups are studying themselves academically, realising a radical dichotomy of 'subject studying subject', because the same (or at least very similar) discursive and power devices are embedded in both sides.

These social groups bring to the academic field different (before marginalised) theories and values, semantics, vocabularies, etc. that can no longer be ignored nor underestimated. As an illustration, I mention how Cisneros (2018) vocalised indigenous mothering experiences integrated with scholarship and activism in academia by accomplishing an epistolary qualitative methodology. Another example is the report by Kahnawake researcher Audra Simpson about the refusal

of indigenous communities to discuss some topics with 'external' researchers to avoid misrepresentation or misunderstandings (Cisneros, 2018). Thence, by strengthening such research developments, these new empowering social groups have potential to create forms of relationships between the researcher and field of study that can minimise risks of oppressive mechanisms and articulate voices, perspectives and phenomena still underrepresented.

According to Trigg (2001) 'Once the argument is seen to be not about purifying science of the taint of "values" but about which values are essential to its purposes and which bias us away from them, any distinction between fact and value becomes irrelevant' (p. 121). However, what is still lacking in such introductory course books when it comes to discussing 'value-free' science is that values are immersed into gender, race, class and other social and power axes – which, if not assumed and exposed, can function as Disciplinary mechanisms of naturalised oppression (Smith, as cited in Mott & Cockaine, 2017).

This chapter discussed the historical background of positivism and how it has influenced educational practices in the Brazilian context – understood through Foucault's analytical tools, the intersectionality paradigm and the politics of citation. It helped me to realise how important the conditions of possibility and the historical disciplinary struggles between social actors are in the process of building scientific and educational power devices.

This investigation made me think of the relevance for educational scientists and practitioners to consider how their research influences policymakers, media and other social apparatuses since the discursive practices of the sciences have high status in Western societies and a strong impact on our daily lives (Yuval-Davis et al., 2006). Volke (2010) brings a fundamental contribution to this argument in the following passage:

[...] there is no 'neutral ground' on which to stand, literally and metaphorically, in relation to ongoing histories of oppression and colonization. On this view, it is a mistake to do philosophy as if class, race, gender, sexual orientation [...] does not matter, and engaging responsibly with those representing alternative standpoints entails being mindful of the privileges we do and we do not enjoy by reason of our social location in contexts of domination. (pp. 38–39)

From a global to a local perspective, these reflections also helped me to understand the specific phenomenon of my colleague being criticised by her supervisor and opponents during her master's defence. She, the researcher, came from the research field she was studying: she had previously engaged in the educational programme she was investigating, and her partner also came from the poor rural communities targeted by the programme. Even though her research was carried out through both qualitative and quantitative data analysis, accomplishing triangulation strategies to guarantee the reliability of the results, the evaluators considered that her engagement with the study field could be regarded as a pro-manifesto for the educational programme.

I believed such discussion about the relationship between the researcher and object of study was already exhausted by philosophers of education and current methodological debates. However, comments coming from such a powerful position, such as evaluators assessing a master's candidate's work, unfortunately still happen in Brazilian universities – even contradicting other discursive practices in the same space. Therefore, this discussion must be carried forward, and those comments must be confronted, so that such opinions do not cause regression on educational practices after so many years of social disputes and political conquest of rights.

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