Democratising Participatory Research

Pathways to Social Justice from the South

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1. Introduction

1.1 This South African Story Matters to All of Us

As a young, working-class girl who grew up in a mono-parental family in the South of Spain, knowledge meant something simple but also something unattainable. First, it was clear to me that we all have the capacity to know many things to a certain extent. Back then, I thought my mother knew a lot, many adults did as well. They knew how to do things and how things worked in the local context. However, there was another kind of knowing that was relegated to others, especially not for a family like mine, the knowing from universities and what is usually understood as scientific or academic knowledge.

University knowledge, the knowledge nourished within universities' walls, was a mystery to me and many of the members of my family and friends, however, somehow whoever was able to access it or embodied it through university degrees or any diploma would become something 'more'. This 'more', was not a distinction between which kinds of academic knowledge we were talking about. It was an intrinsic value that raised the person possessing scientific knowledge to a level of dignity that was strange to imagine for someone who had never been seen in that light. Equally, becoming 'more' meant of course, we were 'less'; less respectable, less educated, less intelligent, and less dignified than those who were part and parcel of these elitist institutions.

And all this became overwhelmingly clear when I first entered university at the age of eighteen and, as expected, I failed, and I dropped out during my second year. I was constantly wondering: how do I not belong in this university when everyone said (directly or indirectly) to me that this is what I have to do to become a dignified human being in my society? To have opportunities, to have a voice, to have freedoms,

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to become the person I wanted to be. At that time, it was not yet the moment to understand but to experience that other worldview so different from the one I grew up with and I lived in. It was not yet the time to deconstruct all these underlying assumptions, until I overcame certain structural barriers.

I was not meant to become an academic, not meant to complete my university degree, masters or PhD, but the fact that I did positioned me in this world with a slightly different perspective, understanding the intersecting disadvantages I experienced, as well as my privileges as a white and European member of our global and unequal society. Of course, it was not only my educational path that foregrounded this understanding, but many other encounters, experiences and reflections about who am I and what dignity, humanity, knowledge, justice and universities are, and ought to do.

Having faced many structural constraints in my educational and academic path, I was sure that universities ought to do better, but this became even clearer when I landed in South Africa more than six years ago and started my research career in the field of Higher Education and Human Development. In a country where aberrant inequalities are lived and experienced on a daily-basis, I became aware that universities were not only excluding working-class students in Europe, but that this exclusion becomes more nuanced and profound in post-colonial contexts such as South Africa. Many students and their communities are not just marginalised because of socio-economic class, nationality or gender, but also because of race, culture, language or religion, among many others. This can make them become the 'other' to an extreme, such that they are detached from their most fundamental humanity, their recognition as humans, and as humans who belong (Mpofu & Steyn, 2021). Being estranged from one's humanity also equates to being estranged from knowledge, thereby jeapordising one's recognition as a dignified human who knows and who deserves to be listened to (Ndlovu-Gatsheni, 2018). And this is precisely my concern in this book. Recognising the importance of higher education and knowledge processes in defending the humanity, dignity and knowledge agency of those situated on the margins, whoever they are. Those who were thought not to know at all by modernist thinking, especially in post-colonial contexts such as South Africa. As maintained throughout this book, we cannot talk about

knowledge in the singular, but rather we must talk about knowledges because they are relational, cultural, intuitive, scientific, Indigenous and more. Despite scepticism in academia, the ultimate 'knowledge' is not only possessed by one group behind university walls, nor is there a finite and perfect underline of universal truth. 'Knowledges' are incomplete pieces of partially knowing that need to be connected in networks with others, as De Sousa Santos (2014) claims. Thus, in order to connect them we need to look beyond our constraints and limited logics, allowing us to expand our conceptions of what reality is (what I refer in this book as ontology), and what knowledge is (epistemology). But especially important in this book is the means by which we obtain knowledge (methodology) having an underlying critical and historical perspective that acknowledges power and oppression.

Connecting knowledge is not building networks of abstract objectivities where knowledge is aseptically carried. Connecting knowledges is what De Sousa Santos (2014) calls 'Ecology of Knowledges'. It is the recognition that we carry rooted knowledges. As such, different collectives, communities and peoples need to be involved in the knowledge creation process that universities lead. However, involvement does not mean the instrumentalisation of people. What participatory research promotes is the centrality of participation and democratisation of the knowledge production processes (Kemmis, McTaggart & Nixon, 2013). Democratising research is not only about providing open access to scientific knowledge or access to universities, which is also important, but beyond that the equal and as just as possible involvement of other collectives, individuals and the knowledges which they carry as central to a multi-epistemic knowledge production.

While this is an issue of concern for all of us, it certainly needs special attention in Global South contexts and what I also refer to here as post-colonial spaces. In referring to the Global South, I do not designate a geographical area but rather a cultural, cosmological, metaphysical and ontological space, which is dominated by Western standards of living that minimise and jeopardise other valued ways of being, living and doing in the world. The Global South, and South Africa in particular, as explored in this book, have been subjected to complex historical processes of deprivation not only at the individual level but at the community cosmological level, which have repressed and invalidated

local languages, knowledges and cultures. These oppressions have tremendous consequences for social justice aims, including the freedoms of communities in the Global South and processes of democratisation of knowledge, which are needed to overcome global epistemic barriers.

Therefore, in this book my aim is to build a theoretical and practical foundation based on these ideas and discussions, named Democratic Capabilities Research. It defends the use of participatory research in scientific projects, but also expands and enhances what is currently carried out as participatory research beyond Western applications, situating this in a Global South context. In a way, this book is a methodological discussion between different academic fields of study, transgressing assumptions about what knowledge is, what reality is, and how we obtain knowledge. The point is to use a moral and evaluative framework such as the Capabilities Approach to advance towards more, rather than less, democratic knowledge production. It acknowledges our imperfection as human beings and researchers, but also acknowledges the plurality of voices from the Global South that should be heard. This is ultimately a pathway to enhancing human capabilities and human well-being, and therefore, to assisting higher-education institutions and participatory research practitioners to reflect on social justice aims, which they claim to do, but perhaps are not doing so well.

Hence, while this book is a deep and normative critique of scientific scholarship and the limitations it has placed on knowledge production through the modernist tradition, it also engages with the language, theories and discourses of different academic fields. The objective is to speak directly to an academic audience who are starting to use participatory research, or who have used it, without considering their Western limitations. I hope this book, therefore, clarifies what might be called an imperfect but meaningful democratisation of knowledge, and elaborates how this would look in practice within and beyond what we understand as 'research'.

On the other hand, structures of oppression and the unfreedoms of post-colonial contexts are central to this book. In this book I use the term 'conversion factors' to represent structures of privilege and exploitation, however these are not divided between individual, social and environmental conversion factors as they tend to be within capabilitarian literature (Robeyns 2005). For many communities in

the Global South individual and social factors are intrinsically bound, and individual 'normalcy' is socially created and therefore indivisible (Ndlovu 2021).

Equally, central to my idea of conversion factors is its colonial element in the Global South. This is why I use 'colonial conversion factors' as a merged category. With colonial conversion factors, I refer to post-colonial effects on individuals' freedoms. Colonial conversion factors have disproportionately deprived targeted groups, impacting their freedoms negatively while giving huge privileges to other groups. These colonial conversion factors create an abyss between dominant and subordinate groups with various shades of grey between them. The central point of this conceptualisation is that we really do have good reasons to acknowledge post-colonial oppression. Examples of colonial conversion factors and their degenerative consequences on students' freedoms might be the use of foreign languages by universities to teach local students or when university knowledge is foreign to local students.

In these institutions students are seen as receivers and passive agents of their university experiences, however this study confirms that students know which capabilities matter for them and that they are active agents against aberrant oppression through insurgent capabilities. Hence, this book stresses that full (not partial) access to the Western epistemic system is fundamental and necessary in order for students to exercise other valued capabilities. Nevertheless, this alone is not sufficient. The process of accessing the epistemic system does not only relate to accessing direct academic knowledge, but to understanding and taking part in the processes of knowledge generation, through multi-epistemic knowledge platforms. Therefore, epistemic freedoms depend not only on access to a Western epistemic system, but also the power to overcome colonial conversion factors jeopardising students' valued capabilities.

Hence, the case investigated shows that involving university students in a knowledge production process, such as Democratic Capabilities Research, permits us to expand significant freedoms through functionings such as voice or participation, beyond the invaluable importance of becoming dignified members of their university community. We know that participatory research, as well as universities, cannot resolve all of the colonial oppressions that these students experience before, during and after their higher-education paths. To advance towards

social justice in a broad and open-ended way, the point is to identify practices that help us create local and contextual spaces of epistemic resistance and transformation, even if they are imperfect, through plural and contextualised participatory processes. Further, in this book the Capabilities Approach supports and defines the evaluative and moral understanding of what our path towards more socially just universities might mean in democratising knowledge production.

Therefore, the three main aims of this book are:

- To engage with decolonial and participatory approaches literature to unpack the different natures of knowledge and knowledge production in academia. This analysis presents a Global South basis on which to position a more democratic epistemic platform, which acknowledges the plurality of knowledges.
- To explore the conceptualisation and implementation of a participatory capabilities-based research (Democratic Capabilities Research), which links the Capabilities Approach, participatory approaches and decolonial debates.
- To explore the opportunities, challenges and lessons with regard to the democratisation of knowledge and promotion of socially just higher education from a Global South perspective that emerges from a DCR case study with undergraduate students in South Africa.

To conclude this section, and before exploring the context of this book, I would like to remark that this book is inevitably a reproduction of epistemic inequalities. It is immersed in knowledge asymmetries, with some still more capable than others to be heard and to be believed as worthy testifiers (Fricker 2015). I am aware that in my positionality as a white European woman, I continue to reproduce epistemic inequalities when talking in the name of Global South populations and in the name of black students. I am certainly using my privilege of voice in the academic space as a white woman. However, it is true that beyond that reproduction of white privilege, I intend to partially overcome these challenges. And I say partially because if things were the way they were supposed to be, I would not be the one writing this book, or this

book would not need to be written at all. That is why I see myself as an imperfect ally and as a comrade in my own privilege and discomfort with that privilege. However, I see the need to raise concerns about participatory research in powerful circles so as to advance critiques already identified by Indigenous scholars and critical participatory practitioners (Coombes, Johnson & Howitt 2014; Chilisa 2013; Kovach 2009; Ritchie et al. 2013; Santos 2012; Smith 1999). This is in my view a combination of forces, strengthening these scholars' arguments and criticism from an alternative framework, such as a capabilitarian perspective. It confirms that we might succeed in transforming the 'decolonial' research practices of which we dream.

Thus, I hope this introduction has encouraged most of you to continue reading this book, and to understand the importance of listening and overcoming whiteness and Western thinking about university experiences and participatory research in the Global South 'to the extent that we are able to do so'. I hope my work can transcend and challenge Western academic understandings as much as possible. Hence, I ask you to read this work as my own personal struggle to unlearn my privileges and biases. This is a work in progress embedded in my personal and professional struggle of becoming aware of and challenging my inherited whiteness and Eurocentrism in my interpretations of the world.

1.2 The Context of this South African Story: Getting to Know the Post-Colonial Complexities in Higher Education

The South African higher-education context presents an invaluable object of study for this book. Its colonial past and current debates about decolonisation from grassroots movements and scholars (Pithouse 2006; Botha 2007; Luckett 2016; Butler-Adam 2016) sustain and justify the need for this type of research. The South African context, although different and specific, shares similar challenges with other higher-education institutions in the Global South. Thus, the Global South perspective is therefore important for visualising and claiming to Global North scholars and international scholars as a whole that these issues cannot be resolved without their critical engagement and alliances in seeking

out alternatives. Therefore, I will start with a short contextualisation of the higher-education system in South Africa.

Traditionally, higher education in Africa has been emblematised by its modern and colonial higher-education institutions. However, it is nowadays well known that pre-colonial Africa developed its own Indigenous educational systems equivalent to modern higher-education institutions, with methods based mostly on oral transmission of knowledge (Diop 2010). For instance, Oyewumi (2016) explored the role of motherhood in a particular knowledge system, that of the Yoruba, investigating how knowledge was transmitted orally through a system of divination, and that, although matriarchal, it did not exclude males from the educational endeavour. Ndlovu-Gatsheni (2018) furthers these ideas, introducing the role of extended family and traditional intellectuals into the Indigenous educational systems as part of the collectives in charge of transferring knowledge to the younger generations. Further, scholars situate the first universities in Africa around the time when African Indigenous systems intersected with Islam/Arabic systems of education, resulting in the University of Qarawiyyin in Fes, Morroco (AD 859), the University of Al-Azhar in Cairo, Egypt (AD 972) and the University of Timbuktu in Mali (twelfth century). What is controversial is that none of them have survived or resisted the imposition of the modern Western university, due to the intervening slave trade and savage exploitation of the continent.

In this historical phase, Africa and its African peoples were considered inferior, meaning that all their traditions, beliefs, languages and knowledges were replaced by those of the colonisers. However, as stated above this did not apply to all countries in the Global South context, and there were great differences between their experiences. In Latin America the isolation of certain tribes and communities allowed for the preservation of some of these cultures; and the earlier decolonial process promoted the flourishing of alternative and insurgent educational projects around the continent. In comparison with African nations, the Latin American context is composed of alternatives to mainstream educational programmes, although not without challenges (Mato 2014). However, in Africa there has been a more significant move towards Western educational systems, sustained by international aid and development interventions, which are still central to current

social and political transformations, even if in the last years there has been vigorous debate about these inherited aspirations. This proves that the diversity of the Global South is clear, and that the responses against the hegemonic system differ from context to context. When I talk about the Global South I do not talk about a unified space. In Africa, and particularly South Africa, the fight was and still mainly is leading towards assimilation with mainstream Western educational systems, due to the division imposed by the apartheid regime and the global neoliberal pressure to situate South Africa in an international economic market. Hence, although there are differences, what is common in these post-colonial spaces is the imposition of a Western educational system, that ignores citizens' local and rooted knowledge systems and their need to defend their fundamental non-Western or alternative educational aspirations and freedoms.

Switching now in particular to the South African context and its 'modern' educational system, the 'modern' higher-education system in South Africa was established under colonial rule in 1829 with the South African College in Cape Town. In 1910, three establishments existed in the country (the University of Cape Town, Stellenbosch University and the University of South Africa), which expanded with affiliated colleges in every region of the country, creating the current higher-education network (Pithouse 2006; Cloete et al. 2006). In 1953, the Bantu Education Act (1953) enacted legislation to racially segregate all educational facilities in the country (Tabata 1960). The apartheid regime used higher-education institutions as an instrument to achieve their political aspirations. They developed into strong institutions internationally up until the 1960s, when the international community began to question the legitimacy of the segregated system, provoking an academic boycott (Badat 2008; Bunting 2006). Additionally, resistance against apartheid flourished in South African universities during this period, with grassroots movements[1] that positioned themselves as

1 Student movements played a crucial role in the historical transformation of universities in the country. Educational activism took place in South Africa during the 1970s and 1990s. Student associations such as the South African Students Organisation (SASO) or Black Consciousness Movement (BCM) nurtured intensive debates about policy, transformation and practice (Naidoo 2015; Karodia et al. 2016) which continue today. During 2015 and 2016 diverse protests took place in different universities all around the country, and fourteen institutions were shut down in

opponents of the National Party prior to the release, and subsequent ascent to the presidency, of Nelson Mandela (Naidoo 2015; Karodia et al. 2016).

After 1994, a new South Africa was born with the first democratic elections, which reflected an aspiration to transform the nation and its higher-education system, as prescribed by the White Paper of 1997.[2] Nevertheless, as Badat (2008, 19) corroborated, 'social, political and economic discrimination and inequalities of race, gender, institutional and spatial nature profoundly shaped and continue to shape South African higher education'. Certainly, many posterior studies have corroborated this, mapping a higher-education context in which a significant part of the student body lives under severely deprived conditions and clear post-colonial marginalisation. A significant number of students survive on government bursaries or face daily issues related to food security on campuses around the country (Breier 2010; Firfirey & Carolissen 2010). As Walker (2020, 66) corroborates, 'It is very clear that students do not leave socio-economic inequalities behind when they come to university, that student hardship is a reality'.

The recent emergence of student demands for the decolonisation of universities in South Africa is one indicator of the fact that this issue remains unresolved in the country, as well as internationally.[3] The different protests since 2015 have brought about a public debate in South Africa, with calls to challenge the ways in which we think about colonisation, and its influence on how knowledge is produced in higher-education institutions (Karodia, Soni & Soni 2016; Bosch 2017; Luescher, Loader & Mugume 2016; Naicker 2016). Moreover, the academic debate on decoloniality has been active internationally for decades, with many demanding that academia ought to be liberated from hegemonic structures (De Sousa Santos 2010; Hall & Tandon 2017; Leibowitz 2017).

Thus, all these historical and present challenges have fuelled public scrutiny of the functions and aims of public higher-education institutions in the country, as reinforced by scholars and the student

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the largest and most effective student campaign post-1994, #FeesMustFall. This campaign opened up latent debates about the role of universities and the heritage of the colonial institution.

2 See the link for more information http://www.che.ac.za/sites/default/files/publications/White_Paper3.pdf.

3 See https://www.bbc.com/news/world-africa-34615004 for more information.

body (Badat 2008; Luescher et al. 2016; Msila & Gumbo 2016; Postma 2016; Van der Merwe & Van Reenen 2016). These features make the higher-education context especially relevant for this study, advancing the current debate on alternatives that could challenge persistent injustices in the area of knowledge production. Furthermore, the South African case can be used to critically examine post-colonial challenges in higher-education systems around the world. It is necessary to open up this debate to an international audience and especially international scholars in powerful institutions, where many decisions severely impact on Global South universities. Hence, South African higher-education institutions are crucial because their decolonial project is not a parallel system, but an integrated solution 'within', which is not found in other post-colonial contexts. This is an essential platform through which we can form alliances and start conversations with the Global North about real plurality and the real introduction of Southern perspectives into their higher-education institutions.

1.3 The Baseline of this Book

To conclude this introductory chapter and for the sake of clarity, it is necessary to provide some explanations of the terminology used and ideas driving the argument before outlining its structure.

The word 'research' in this book is understood broadly, as 'knowledge'. Research is one of the most contested words in academia, as many Indigenous scholars have pointed out. Research seems to be as much an ideological as a political term, which is signified by what lies behind it; its historical and philosophical tradition (Smith 1999). For this reason, in this book, research should be understood as having an open-ended definition, which considers research beyond a disciplinary contribution to academic knowledge, although its academic component is still present. In this way, research is—in many parts of this book—a general capacity for investigating things that we need to know (Appadurai 2006). As Appadurai claims, '[i]t is the capacity to systematically increase the horizons of one's current knowledge, in relation to some task, goal or aspiration' (2006, 176) beyond any disciplinary or academic contribution to the body of knowledge. Hence, although the case study explored in the second part of this book can

be regarded as a conventional piece of research, especially through the qualitative exploration of valuable capabilities (Chapters Five, Six and Seven), the proposed Democratic Capabilities Research (DCR) case study and its practice needs to be understood in this broader way. DCR is a pedagogical space in which the investigation itself goes beyond scientific standards of research because knowledges other than the scientific one are used and assessed in the process.

Accordingly, the word 'knowledge' is used in a similar way. Just as the outcome of scientific research is scientific knowledge, in expanding the meaning of research I do the same with the knowledge resulting from the enquiry process. Epistemic injustices are based on the dominance of one epistemic system over others that are thought unworthy and unreliable (De Sousa Santos 2014). Therefore, when referring to knowledge, I designate a multiplicity of systems that are rooted in different cultural traditions as well as diverse processes of knowledge creation, rationality and relationalities (Mignolo & Walsh 2018). This is to understand rationality in a broad sense that goes beyond the modern understanding, embracing other means of understanding and producing knowledge. To do so means acknowledging what lies beneath the broadest meaning of knowledge as including—but not limited to—scientific, conceptual, experiential, intuitive, local, spiritual, Indigenous and cultural knowledge. It is in this space, where knowledge creation seems to merge with a learning process, that there is no clear difference between a process of knowledge production and a process of active learning, so both go hand in hand.

Secondly, the decolonial claim throughout this study does not represent a radical perspective, even if it might be considered that way. Conversely, this critical positionality understands the importance of scientific knowledge and is under no circumstance trying to invalidate it. The case presented in this book clarifies the invisibility of other knowledge systems and other means of research that have historically been invalidated. These knowledge systems need to be acknowledged if we want to advance towards epistemic and global social justice (De Sousa Santos 2014). Therefore, the argument sustains the creation of spaces within, as well as outside academia to promote other knowledge systems and other research processes. As Mignolo (2007) corroborates, it is not a question of a new hegemony that is different from the old

one, but of how we are able to create bridges between all the different traditions of knowledge and apply them on a more egalitarian terrain. Furthermore, to acknowledge this positionality, the book makes use of the terminology 'decolonial debate' in order to clarify the particular vision of decoloniality sustained in this study. This refers to the preservation of diversity and the multiplicity of practices for knowledge creation, not as a single theory but as an open-ended debate with different and compatible positionalities. Methodologically, that is why we undertake an open-ended participatory process with undergraduate students as well as using qualitative techniques. The inquiry process explores students' valued capabilities and how researchers and practitioners can overcome Western participatory processes using the Capabilities Approach, as part of the DCR role of the facilitator.

Regarding the terminology used, namely 'coloniality', 'decolonisation', 'decolonial', 'decoloniality' and 'post-colonial', I would like to clarify several aspects, especially regarding the distinction between 'decolonisation' and 'decoloniality'. As many societies and groups have been exposed to and oppressed by colonial powers, their resistance to these can take on different names and features. This is important to highlight because these collectives, populations and experiences are different and their responses to it are equally distinct. This variety of experiences has resulted in numerous terminologies for naming resistance to hegemony. In a bright attempt to classify them, Ndlovu-Gatsheni (2018, 49–53) identifies at least twenty decolonial intellectual currents, movements or philosophies in this diversity of resistances. For instance, these include Rastafarism, Garveyism, Black Consciousness, Black Feminism, Dependency Theory, Afrikology, and many others. What differentiates one from another is the central focus of their resistance, which is defined by the persistent inequalities affecting the particular collectives, although somehow all share a common resistance to the dominant Western system. In this classification, decoloniality and decolonisation are situated in a single category, which is the way I use both terminologies in this book. However, it is worth mentioning that some scholars do differentiate between them. Mignolo and Walsh (2018) refer to decolonisation as overcoming the territorial dominance of the old colonies. For many scholars in the Latin American and African traditions, decolonisation was the territorial process, and thus

coloniality comes after that as a structure of power that was preserved after independence from the colonies (Tamale 2020). This is the reason why the use of 'decoloniality' instead of 'decolonisation' refers to the will to overcome colonial thinking and to act in decolonial terms. Furthermore, as Mignolo and Walsh (2018) insist, decolonisation means a final point at which we will ultimately get rid of colonial domination which, for them, is not achievable. They sustain that we need to act in favour of decoloniality, not as overcoming coloniality—this will never happen in their view—but as thinking and acting in ways that help us to achieve certain steps without reaching the end of the road. Although I agree with much of this argument, I still use the word 'decolonisation' because the prevalence of this concept (rather than 'decoloniality') in the South African higher-education context is significant. In using it, I believe I am conserving the meaning that is attached to the term locally, whilst defending the term not only as meaning territorial independence but also as meaning a process (that is always incomplete) towards an ecology of knowledges, democratisation of knowledge and the social justice aim thereof.

Thirdly, this book refers to participatory approaches as participatory practices that can be applied on three levels, namely participatory methods, participatory methodologies, and participatory research processes. This division is acknowledged intentionally to help the reader to understand the different categories and their various implementations. When we refer to participatory methods—which are residual in this book—we highlight a specific use of a participatory element within a larger study, which aims to collect data sets for the researchers to analyse. For instance, a quantitative research team working on food security wants to have a participatory workshop with a particular community to better understand food habits and food availability. In this case, the research team prepares a series of participatory activities and implements them in order to acquire some data about how to improve the following methodological step or just to collect data using different methodological strategies. In these cases, there is a clear participatory component, although this is only as a punctual strategy for the researchers to collect data. This is a common practice, especially in development studies, but it does not deal with the many dilemmas in how knowledge is produced. Due to this, the outcome of the workshop is

only a preparatory step or a process of innovatively gathering data, and does not involve any further philosophical questions about knowledge production. Therefore, when referring to participatory methods, we refer to this type of practice or similar examples, such as not necessarily involving communities in designing the research project, not analysing together and so on.

On the other hand, this book is more strongly focused on participatory methodologies and research processes. Surprisingly, the differences between them are not really clear in the literature and they tend to be mixed unintentionally, due to the significant differences between academic fields and their conceptualisation of 'research' and use of methodologies. For instance, the majority of social sciences research or educational research will see the process of enquiry as linear, from conceptualising the issue, to finding the academic gap, to designing an adequate research design, to applying it, to analysing and concluding it. This is not the same process for other disciplines such as anthropology, in which, for instance, the case of grounded research challenges a linear structure. Therefore, due to the transdisciplinary nature of participatory approaches and the different influences in their practices, the division seems not to be sufficiently clear. Therefore, as a clarification for this book, when the text refers to 'methodology' it does not necessarily imply that the community or group of individuals participating have been deciding the issue under research, although this may be possible in some cases. On the contrary, it mainly refers to when the scholar frames the issue under research and implements a participatory methodology that can be composed of diverse participatory techniques that are enacted by the community, resulting in a collaborative knowledge production process. And finally, when referring to the participatory research process, the text acknowledges a collaborative process from beginning to end, in which the individuals (meaning community members and researchers) are those who define and propose the issue under research and implement the research process in a collaborative study. Therefore, the conceptualisation of the capabilities-based participatory practice (see Chapter Four) shall be framed and referred to throughout this book as a 'research process', rather than a methodology.

It is due to this ambiguity that some scholars may consider this book a methodological discussion, instead of seeing it as a new conceptualisation

of an alternative research process and of the principal role of the facilitator. I will argue that this book proposes a research process which is informed by the Capabilities Approach and a particular decolonial debate to explore Southern processes of knowledge generation. In this way, what I am claiming is not only the methodological space—the strategies to create knowledge—but the collaborative formulation of the issue under research. This is a major statement, as it assumes that the conceptualisation of the issue is a political, metaphysical, ontological and cosmological statement that may highly affect and/or misdirect the research process as a whole. Furthermore, the role of the facilitator as a qualitative researcher is still present, not only in order to value scientific knowledge but as a way to enhance contextual knowledge creation in the field of capabilities. This is equally a way to promote an ecology of knowledges, as a whole, combining grassroots research processes and qualitative research processes.

Equally, terms such as 'North', 'South', 'voiceless', 'democracy', and 'social justice' need to be clarified in this section, in order for the reader to anticipate their meaning throughout this book. First, the distinction between 'North' and 'South' in this book refers more to a geopolitical space, as clarified in the first section of this chapter. North and South are understood more as a mindset than as a geographical space. These terms do not represent a static or well-defined territory; they represent different logics, which give sense to the way we live and act in the world. This vision, in a way, implies a controversial territorial division that contradicts many of the arguments supported and defended in this work. I do not consider any of these categories as internally homogeneous. As highlighted above, the South, as a geopolitical space, has been subject to diverse and varied forms of oppression, and thus the experiences and responses to these are different from context to context. What this case helps us to do is to re-think. It does not universalise experiences in the Global South, but pays attention to contextual specificities and how we can challenge these tensions from a Global South positionality, with an open-ended epistemological basis.

On the other hand, the term 'voiceless' is here used with a particular meaning, which it is also necessary to comment on. When students are referred to as a 'voiceless' group, it does not assume they do not have a voice. Actually, the argument supported here is that they do have a

voice in diverse ways and express it by different means—such as for instance through student protests, or their capacity to choose those capabilities that they deem valuable. Conversely, the term 'voiceless' refers to the difficulties they have accessing and contributing to powerful or dominant structures of knowledge production. In this case, I acknowledge that they produce knowledge in their own ways and have a voice in certain marginal spaces due to many Western epistemic oppressions. Thus, this project seeks to link and build bridges between diverse areas of knowledge production. It creates a more—although not perfectly—equal terrain, especially for those that have historically been excluded from powerful spaces. Thus, this project enhances their capacities to participate in those epistemic systems to which they did not have access due to their colonial epistemic marginalisation.

The terms 'democracy' and 'social justice' also need further clarification. Both terms are used in this book from a capabilities and Southern perspective. First, 'democracy' is understood in a broad sense, as Sen claims (2009). He asserts that democracy needs to be assessed by 'the capacity to enrich reasoned engagement through enhancing informational availability and the feasibility of interactive discussion. Democracy has to be judged not just by the institutions that formally exist but by the extent to which different voices from diverse sections of the people can actually be heard' (Sen 2009, xiixiii). In this way, democracy in this study is understood in terms of the extent that individuals from diverse sectors are scrutinising for a better decision- and knowledge-making process. This includes the extent to which different Southern populations and groups can be heard and the relevance of participatory research to enhance these marginal voices.

On the other hand, the term 'social justice' is equally framed from the Capabilities Approach and a Southern perspective. In this sense, I am not trying to identify the perfect society or pursue a theory of justice. Conversely, I am looking for 'deplorable situations that leave individuals with few choices to exercise their reasoned agency', such as epistemic injustices (Sen, 1999; Fricker, 2015). Therefore, injustices refer to situations where individuals are not able to enjoy their valued capabilities, or their valued freedoms, and cannot become the individuals they want to be. In this sense, I am not talking about a unique way of achieving justice but rather an incomplete sense of

justice that needs to be guided by the lives that different individuals and communities have reason to pursue. Hence, it should be guided by lives as valued by Southern perspectives and by the question of how well their institutions and systems are protecting these valued lives. Furthermore, as Drydyk (2012, 32) corroborates, 'Acting justly, according to the Capabilities Approach, aims not merely for people to rise above capability deprivation, but to do it through processes that are empowering for them, so that they have become better able to shape their own lives'. Thus, these ideas are where the Democratic Capabilities Research practice and its orientation towards Southern social justice align. It is not only about enhancing capabilities, but rather about doing so by means of a process that empowers and prepares individuals and groups to better shape their own lives in their own valuable ways, thereby overcoming Western ways of being and doing, as imposed by the Global North.

As a final point, in capabilitarian literature, the Capabilities Approach is also referred to as the Capability Approach, and both (singular and plural) terminologies are used indistinctly (Nussbaum 2011). However, this book uses the plural formulation of the term, 'Capabilities Approach', throughout the text to highlight and emphasise the plurality of capabilities that are valuable for diverse and heterogeneous individuals and collectives as well as the different interpretations of the Capabilities Approach.

Therefore, after some initial clarifications, the final part of this introductory chapter will summarise the book and briefly explore the different chapters of which it is comprised.

This book is divided into nine chapters, with each drawing on different aspects of the exploration. Short excerpts from the collaborative book written by the co-researchers of the DCR project are also introduced at the beginning of each chapter. The DCR collaborative book *Narratives on Social Injustices: Undergraduate Voices* was one of the outcomes of this participatory research process. The twelve undergraduate students decided to write pieces (in different languages) narrating their diverse experiences of social injustices and of what it is to be a young South African undergraduate student. Their stories not only recount current events, but also events and experiences that informed their understandings of their context and life as young university students

in South Africa. They explore intersectional issues such as gender inequalities, racism experienced by them and others they knew, and their struggles to be recognised as dignified human beings in their universities. In this book, I present their stories at the beginning of each chapter as 'rooted moments' for the reader. They are flashbacks into students' minds, which allow us to understand the complexities of the contexts in which these students have grown up and continue to live. The narrative pieces are presented anonymously, as this was the students' preference when co-authoring their collaborative book in 2018. Equally, the students' names have been anonymised through pseudonyms, as agreed with them for this research project. The collaborative book, titled *Narratives on Social Injustices: Undergraduate Voices*, was distributed, as decided by the team, as an open-access resource among attendees of the book launch and other individuals on campus in 2018. Therefore, some stories have been selected and included in this book, in line with our open-access ethos, as a way of enhancing the reach of students' voices. For more information about the collaborative book and other research outcomes, please refer to Chapter Six.

This book commences with a broad exposition of basic elements and theoretical points of this study. It situates this study in the South African higher-education context, presenting an historical review of this country's institutions and their current challenges. The text explores the students' claims for decolonisation and the subsequent revitalisation of the academic literature. The second chapter ('Coloniality and Decoloniality in the Global South Higher Education Context') continues examining and presenting the particular decolonial debate defended in this book. Different aspects are examined, clarifying concepts, ideas and the central vision of decoloniality in higher education.

The third chapter ('Traditions and Limitations of Participatory Research') explores the scholarly work on participatory approaches. This analysis helps us to better understand the academic gap between capabilities and human development literatures, identifying a space for the conceptualisation of this innovative research process, 'Democratic Capabilities Research'. It lays the foundation on which the capabilities-based research proposal is situated, challenging some Western participatory tendencies in the field.

The fourth chapter ('Democratising Participatory Research: A Capabilitarian Conceptualisation') poses the question that if the colonial challenge is central to participatory practices—as the literature in the field claims—how can we resolve the limitations and controversies in the field? For this reason, this chapter introduces the Capabilities Approach, linking its foundational elements with those of decolonial debates. This chapter aims to illustrate the current commonalities between both positions, and the potential of the Capabilities Approach to fill some of the gaps in the field of participatory practices. To this end, the chapter uses an open-ended version of the Capabilities Approach defended by Amartya Sen (1999; 2009) as a way to understand the multiple kinds of life (beyond the Western lifestyle) that different individuals have reason to value. In short, the Capabilities Approach is used as a framework to understand human development, leading us to ask the question: 'What are the real freedoms an individual has to lead the life she/he has reason to value?' This provides us with a theoretical foundation that can accommodate different lifestyles around the world which do not necessarily fit into the hegemonic capitalist/neoliberal/patriarchal/Christian and heteronormative perspectives, thus highlighting this aspect's centrality to the achievement of social justice from a Southern perspective.

Hence, the chapter introduces the participatory, capabilities-based research proposal as Democratic Capabilities Research (DCR) through five open-ended principles that can accommodate the variety of practices and implementations needed to democratise participatory research from a decolonial capabilities perspective. This perspective is flexible and context-dependent—thus, open-ended—as is the view of the Capabilities Approach used throughout this book. The five DCR principles discussed in this chapter are: (1) injustice as an initial issue that unites a group of individuals to research things that matter to them; (2) uncertain horizons, such as the promotion of democratic spaces for knowledge production, beyond simple participation, situating agency at the core of the research process; (3) internal/external diversity, in the sense of allowing the space for an ecology of knowledges or epistemic diversity within knowledge production; (4) resituating the voiceless as knowledge creators, including collectives and individuals excluded from official spaces of knowledge creation and considering them as worthy contributors of knowledge; and (5) the process of knowledge

production as a space for the expansion of an individual's valued capabilities.

The second part of the book is composed of five chapters, three of them dedicated to evidence based on the DCR experience in South Africa, such as exploring capabilities and the role of the facilitator (Chapters Five, Six and Seven); and two of them dedicated to discussion of and conclusions on the DCR case study (Chapters Eight and Nine).

Chapter Five ('Co-researchers' Valued Capabilities') is centred around the debate on the universalisation of capabilities—the creation of universal capabilities for all (Nussbaum 2011)—in relation to the evidence that arose from the case study in South Africa. Firstly, using a prospective application of the Capabilities Approach, the chapter argues for the need to identify the valued capabilities of a group of co-researchers before undertaking participatory practices. The analysis is made by exploring the valued capabilities for the twelve students participating in the case study explored in this book. It incorporates the fluid aspect of capabilities and presents the four central capabilities for this group: Epistemic, Ubuntu, Human Recognition and Self-Development capabilities.

Furthermore, contextual capability choices, instead of a universal list (Nussbaum 2011), are used to compare and understand their differences. Thus, the chapter argues that despite the contribution this universal list makes to the capabilitarian field, we still have good reason to scrutinise it, as many cultural and contextual specificities of the Global South can be lost in these types of aggregation. For instance, the Ubuntu capability identified in this group exposes current understandings of care and support from the Global North that in its Western form limits a contextual vision of this freedom. Further, the chapter presents conceptualisations such as 'Insurgent capabilities' and 'Colonial conversion factors', discussing their relevance in a Global South context such as South Africa. Hence, it provides Southern perspectives as an alternative to normative, Western, liberal ways of seeing and understanding the Capabilities Approach. The final section of the chapter focuses on the actual prospective frame designed prior to the participatory project in this DCR case study, as part of the facilitator's role. The frame highlights the strategies drafted according to the most valuable capabilities among the group of participants. These strategies are presented in order to show how the author—as facilitator—applied

the different recommendations from the prospective plan during the DCR project following Principle 5 from the DCR practice.

Chapter Six ('The South African DCR Project: Undergraduates as Researchers') clarifies how the DCR process took place and what the DCR team did in each of the workshops, with emphasis on the valued capabilities highlighted in the previous chapter. Thus, this chapter presents the participatory project, focusing on the data from interviews and students' perspectives on the participatory project, as collected by the facilitator during and after the project. Nevertheless, data from journals and participant observation are also displayed in order to problematise the power imbalances within the group and within wider debates on participatory literature. Furthermore, the chapter discusses tensions in the application of Principle 3 with regard to the ecology of knowledges and practical imbalances due to contextual variables.

Chapter Seven ('Broadening our Participatory Evaluations: A Southern Capabilitarian Perspective') explores the cases of two students from the wider group of twelve using the qualitative data collected in the case study. These two cases were chosen due to the students' uneven levels of enjoyment in their capabilities sets when they first became part of the project. The two students had really different lives, coming from different cultural and economic backgrounds, and being of different genders. The lives they had reason to value had commonalities and divergences that are worthy of exploration when using capabilities to guide our participatory practices. Their actual freedoms were distinct and thus they had dissimilar valued capabilities. Hence, individual choices about valued capabilities and the initial enjoyment of those capabilities are important sources of information when it comes to assessing participatory practices such as DCR.

Therefore, this chapter highlights what a capabilities analysis of DCR adds to current evaluative spaces. It provides a more people-centred analysis, but at the same time avoids paternalistic assessments. That is, instead of using generic capabilities to understand what impact the participatory project had on students, the chapter presents students' valuable capabilities as an evaluative space.

Subsequently, Chapter Eight ('DCR for Socially Just Higher Education: Perspectives from the South') focuses on the idea of justice and the challenges and lessons learned from the South African case study (Sen 1999). Firstly, the chapter combines conceptual and empirical elements,

prompting a conversation between the five principles presented in Chapter Four and elements from the data in this project to conceptualise this DCR practice. Thus, the five DCR principles are taken from its initial conceptualisation and reviewed after the case study implementation, exploring their actual application in the South African case as well as their contribution to social justice and decoloniality.

The chapter therefore begins with an exploration of social justice as a contested term that has been influenced historically by various dominant visions and perspectives (Capeheart & Milevanovic 2007). However, these positionalities have tended to universalise just criteria in order to assess and impose a 'perfect society' from above—usually originating from an elitist and paternalist social class that took it upon themselves to speak in the name of everyone. Hence, justice is in this chapter conceptualised as an incomplete vision that must be contextualised in order to understand its meaning at different points in time and in different contexts, and that must scrutinise perspectives that do not necessarily need to be unified (Sen 2009). In this way, to achieve social justice in knowledge production within higher education we do not need to create a universal way of applying DCR or participatory research. Conversely, we need to contextualise the research, focusing on the moment, place and individuals with whom we are working.

The final chapter (Chapter Nine, 'Redrawing our Epistemic Horizon') focuses on the main contributions, general reflections and conclusions of this book. It also elaborates on the specific contributions this book makes to bodies of scholarly knowledge. Firstly, it starts by looking at the conceptual/empirical contributions linking the empirical and theoretical debates developed in the book. The chapter concludes by focusing on pedagogical contributions and applications in the classroom, as well as possible applications in educational policies. Here, diverse uses and applications are highlighted, broadening the use of DCR beyond its central aim. In summary, this section contemplates the implications of using DCR for institutional practices and policies. Furthermore, the chapter outlines the future directions of DCR and how these practices may be expanded and further theorised in the area of participatory research. It highlights the centrality of networks for the progression and application of this tool in the future as a way to democratise participatory research from a Southern perspective.

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