

Researching students' epistemic access under COVID-19: Epistemological and methodological challenges

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Abstract

This paper aims at critically examining the main epistemological and methodological trends in the scholarship of 'student access' and 'success' in South African higher education. This is done with reference to key moments in the process of higher education transformation and the main arguments on the individual, social and institutional factors that impact student achievement. The paper considers three intersecting domains: the knowledge foundational domain, the social domain, and the research discursive domain. It explores how these domains interface with the individual agency of the researcher and the participant with reference to the imagery and imaginary constructed around difference. The paper shows how the analytical discourses of access have largely reflected global theoretical influences which do not always speak to the local context. Thus, the paper calls for de-colonial approaches rooted in epistemic justice that account for the contextual peculiarities of student agency and experience.

Keywords: COVID-19, epistemology, methodology, student access

Introduction

Cross and Ndofirepi (2017: 83) discuss the challenge of researching "Otherness" in the context of apartheid discriminatory legacy. It makes the following claim, which represents the point of departure for this paper:

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 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 & Ndofirepi, 2017: 83)

The fact that the categories and boundaries of difference between individuals and social groups have been structured historically and as such they are not innate but socially constructed deserves particular attention (Cross & Naidoo, 2012: 229). Social markers of difference cannot be separated from the distribution and exercise of power across society and its institutions. They are indeed a function of social and power relations. In Bernstein's words, 'power relations create boundaries, legitimise boundaries, and reproduce boundaries between different categories of groups, gender, class, race, different categories of discourse, different categories of agents' (2005: 5). These are critical aspects for understanding the historical experience of marginalisation, exclusion, and oppression.

This paper narrows down the problematic outlined in the quotation- 'researching Otherness' - to focus on the challenge of researching 'the historically marginalised Other'. This is done with reference to three intersecting domains in the research process, namely, the knowledge foundational domain (epistemological and ontological foundations of knowledge), the social domain (contextual dynamics in social action and social relations), and the research discursive domain (research theoretical and methodological strategies and practices). The paper does so by backtracking and scrutinizing the past and present methodological discourses in educational research and by 'combing' and foregrounding the distortions and silences embedded in them. In this regard, the paper shows how the analytical discourses of access have largely reflected global theoretical influences, which do not always speak to the local contextual complexity. Of concern is the mechanistic way these theoretical models have been applied with no effort towards recontextualization or adequate critical appreciation. Thus, the paper calls for decolonial approaches rooted in epistemic justice that account for the contextual peculiarities of student agency and experience.

The paper acknowledges the considerable progress made in educational research for understanding the role of student experience and student agency as well as the importance of institutional mediation in student performance, particularly from culturalist perspectives. The argument is based on three premises: the importance of understanding the social experiences of the researched connected to issues of race, class and gender, scholarship as an exercise of power, and the implications of the researcher's positioning in the intellectual enterprise (Cross & Ndofirepi, 2017: 84) – this framing builds on the work of Bourdieu (2003), who draws attention to the researcher's habitus, that is, one's dispositions and pre-dispositions that can influence research endeavours. As such, the paper shows that the resurgence of decolonial theories and the constraints imposed by the COVID-19 pandemic on social research necessitate more innovative methodologies. In this regard, the paper posits that embracing the notion of 'social presence' in its multifaceted dimensions can leverage the benefits of the online medium in fieldwork research, mitigate the limitations imposed by physical distance and the somewhat blind communication and social interaction, and re-establish the required human connection between the

researchers and the participants. Social presence offers greater reflexivity to both the researcher and the participant on how they approach and interpret their actions and socially construct each other in the research process. Social presence, therefore, constitutes an important epistemological and methodological platform for researching the marginalised Other.

Conceptual signposts: intellectual formations, social and political epistemologies

The paper uses the concept of 'intellectual formation' (Muller, 1997, 198), which refers to a group of persons "who share certain epistemic, political and pragmatic interests and who, because of this commonality, exhibit a common consciousness" (cited by Cross et al., 2008:3). Intellectual formations conventionally share an *ideology* (a set of beliefs about the social order – in this case, connected to the role of social theory in systemic, institutional, or social change); a *social epistemology* (a certain conception of knowledge and its relation to society); and a *political epistemology* (concerned with the interface of power, interests, and knowledge in society) (Muller, 1997: 198). An 'intellectual formation' construction of knowledge depends not only on its ideology, but also on the selection of events, names and meanings as well as the voice, silences and omissions it chooses to keep (Cross, et al., 2008: 2). These constitutive conditions of intellectual formations are reflective of the changes of the political economy of society. They are behind the rise and fall of social and concomitant intellectual movements, paradigms, theories and even research methodologies. It is with reference to these, that the distinctiveness of the changing intellectual movements has been identified.

South Africa offers interesting intellectual formations rooted in social movements or wider social crisis: the radical and neo-Marxist formations rallying around the Soweto uprising of 1976 and subsequent school crisis; the decolonial formations triggered by the 2015-2017 university student protests; and emerging social and epistemic justice formations under COVID-19 pressures. Through their emancipatory imaginations, these have in recent years played a central role in generating, shaping and normalising new academic discourses. While this is applicable to the intellectual formations connected to the liberation movements (e.g., the Freedom Charter Movement, the Black Consciousness Movement), this paper considers more specifically those located within the academic environment. However, the unprecedented circumstances imposed by COVID-19 point to the need to rethink the future of higher education within a horizon of possibilities different from the mainstream traditional scholarship.

The notions of *knowledge for* and *knowledge of* also appear useful for the analysis in this paper. They define how intellectuals/academics position themselves in the relationships of theory vis-à-vis practice, knowledge production vis-à-vis knowledge utilisation or policy development vis-à-vis policy implementation (Muller 1996, 198). Some opt for an instrumentalist approach to knowledge (knowledge for) while others lean towards the classic view of knowledge that should only and always be knowledge of. This is a very important distinction for understanding how researchers position themselves with regard to conditions of marginalisation.

Method

The paper critically scrutinises the evolution of the scholarship of student access and success, determining its most salient voices as well as the silences, omissions or concealed narratives through discursive analysis and interpretative strategies. This is done by identifying six main paradigmatic waves in the evolution of scholarship of higher education and student epistemic access in South Africa from the 1960s to the present, namely, a focus on researching the consequences of educational exclusion (1960s and 1970s), the emergence of radical scholarship in educational studies (1976-1994), surveying and measuring educational disadvantage (1995-2010), the advent of culturalism (2010-2014), resurgence of decolonizing perspectives (2014-2019), and the COVID-19 pandemic and prevalence of technology mediated practices in social research (2019-present). The silences and narratives associated with the above periods reflect assumptions about what was worth doing or avoiding in research, about the tasks performed in this process, the patterns of social interaction, the value frame underpinning them, and ultimately about emerging views about the epistemologies and methodologies of research when researching the marginalised. The paper suggests that such assumptions can lead to useful epistemological and methodological breaks, which the paper attempts to explore.

Worth mentioning are the insights on reflexivity, vigilance, and ethics in such research. Attention is given to the questions about how researchers interrogate themselves about who they are, what they do, how they do it, and for what purpose. Such questions warrant a deeper understanding not only of the ontological and epistemological foundations of their inquiry but also of their political, ethical, and moral value frames. In this regard, the article draws on Bourdieu's (2003) notion of 'original complicity' and 'epistemological break'; the former referring to a researcher's historico-cultural embeddedness (the foundation of complicity) with respect to class, race and gender, and other forms of social difference that separates the researcher from the researched. While the latter refers to the degrees of vigilance required for a more epistemic gaze that enables researchers to be more reflexive about their own epistemic position (cited in Cross & Ndofirepi, 2017: 84-85). In this perspective, researchers can be described as persons who by virtue of their knowledge endeavour to know the other, and are 'blessed with a range of procedures, methods, activities, know-how, which make them capable of inventing means of adaptation to give meaning to the surrounding world' [An approximate translation from French] (Coulon, 1987, 44-45; Coulon, 1993: 28). However, in the context of research on marginalisation, the paper also suggests that the mastery and use of research language and communication presupposes not only a sort of cognitive consensus about particular normative paradigms (emancipatory or disempowering) of what counts as research and what counts as knowledge, but also the norms, rules, values and beliefs about the purpose and the consequences of one's research, the meaning of social situations, social interaction and social practice. Here too, drawing on Bourdieu (1990; 1998, cited in Cross & Ndofirepi, 2017: 86), it is important when researching the marginalised, that researchers adopt a critical stance that enables them

to understand and deconstruct their own position in both the research and academic fields. In doing this, research becomes a process of self-analysis in which researchers attempt to grasp ... their own dispositions, in order to make sense of those with, or upon, whom they conduct their research. (Cross & Ndofirepi, 2017: 86)

On the contrary, epistemologically, lack of self-reflection of one's values and beliefs, can result in analytical limitations as was the case with neo-Marxists in their privileging of the black working class in South Africa as an analytical starting point to the exclusion of groups, such as students, who superseded the boundaries of race or age classification (Cross & Ndofirepi, 2017).

Scholarship of higher education access in South Africa: Key moments and insights

This section maps out and critically examines the main theoretical, epistemological, and methodological trends and patterns in the scholarship of 'student access' and 'success' in South African higher education, including the relevant international influences. The purpose is to highlight the theoretical perspectives that have dominated epistemic access research, their methodological implications, and underlying assumptions in order to inform the theoretical and conceptual framework of future projects. This is done with reference to the key moments in the process of transformation underway in higher education, and the main arguments on the individual, social and institutional factors that affect successful student achievement in higher education. Of primary concern are the approaches and analytical strategies for understanding the dynamics of student individual and collective agency, the range of resources, past and present, through which students negotiate their success and the forms of social and institutional mediation.

The changing research and analytical perspectives on student access and achievement are bound up with the shifting systemic and institutional problematic of access in the higher education landscape. Except for the recent resurgence of a decolonial discourse, analytical perspectives of access have largely reflected the influence of global theoretical trends – liberal and radical – with very little drivers connected to the wider African or South African contextual complexities. Of concern is the somewhat mechanistic way international fashionable theoretical and methodological models have been applied to the South African higher education access with little effort towards recontextualizing, reframing them or subjecting them to adequate critical appreciation. This has been highlighted, for example, in the critique of 'liberal multicultural approaches' position on access in terms of the inclusion, integration or assimilation of students from historically excluded groups into existing institutional structures and cultures in South Africa; in particular, the uncritical stance towards 'diversity' and 'culture' which fail to interrogate the ways in which curricula and everyday institutional practices are shaped by dominant cultural constructs such as colonial racial categories and heteropatriarchal norms (for example, Jansen, 1998 and Odora Hoppers, 2001; cited in Cross, 2018).

Thus, triggered by the COVID-19 pandemic and student protests, is an almost widespread realization of the analytical failure of past scholarship in so far as the experiences of marginalization are concerned (Cross 2020 – see pp 107-110, *Transforming Universities in SA*), and a

pressing need for a paradigm shift to an analytical framework that accounts for the peculiar historical experience of the marginalised Other in the South African context. As Tella notes 'South African higher education continues to embrace European models and paradigms, while little attention is paid to Africanisation, indigenisation, racism and curriculum decolonisation issues' (2020: 1). These failures were accentuated during the student protests of 2015-2016 which drew attention to the need for of a decolonised curriculum and the transformation of institutional cultures away from its lingering white and European character (Ndelu, 2020; Adebajo 2020); and the 'mediocrity and ignorance – not of the students but of South African academics' (Modiri, 2016, cited in Adebajo, 2020: 21). More recently, issues of technological access and connectivity in the era of the COVID-19 pandemic have highlighted persistent social and economic inequality affecting marginalised students the most (see later discussion relating to 'social presence').

Overall, six main paradigmatic waves in the evolution of scholarship of higher education and student epistemic access in South Africa can be identified: (i) researching the consequences of educational exclusion – economic liberalism (1960s and 1970s), (ii) emergence of radical scholarship in educational studies (1976-1994), (iii) surveying and measuring educational disadvantage - student throughput and retention (1999-2010), (iv) the advent of culturalism (2010-2014), (v) resurgence of decolonizing perspectives (2014-2019), and (vi) The COVID-19 pandemic and prevalence of technology mediated and online practices in social research (2019-present).

First wave (1960s and 1970s): Researching the consequences of apartheid educational exclusion

The first wave, in the 1960s and early 1970s, is characterized by liberal contestation of the legacy of Afrikaner nationalist exclusivism and the advocacy of education access as a function of economic growth - economic liberalism. A major matter of concern in research studies was the systemic and institutional barriers entrenched through policy to secure universal access for white children in historically white institutions, and discriminatory and segregated access for black children in historically black institutions (*The Open Universities*, 1957). Another matter of concern was the increasing and almost generalized resistance to segregated education across the country (Bundy, 1987). Liberal studies contested the educational and economic barriers to black South Africans by foregrounding the consequences for economic development and highlighting the significance of liberal values to the future of South Africa. These emanated from the main bastions of white liberalism, namely the English-speaking universities (Wits, UCT, UND, and Rhodes) and the South African Institute of Race Relations (SAIRR) (Cross, 1999; Horrel, 1970). *Civil Liberty in South Africa* (1958) stood up as a liberal manifesto that outlined their value framework. The SAIRR articulated the view that 'the demands of the economy of South Africa are stronger than the colour bar with plenty of evidence out of the past to support and, indeed, to prove this view' (Malherbe, 1966: 66; also see Malherbe, 1969). This was demonstrated through publications of regular statistical surveys on aspects of racial discrimination. *The Open Universities* (1957) challenged the University Education Act of 1959, which confined black students to historically black

universities. Promoting economic liberalism, the Wits Education Panel articulated the view that apartheid exclusionary practices were 'archaisms' that threatened the South African economy and ought to be removed (Horrel, 1968). Theoretically, energized by the unprecedented economic boom of the 1960s and 1970s, liberal scholarship reflected the increasing influence of human capital theory in the face of increasing need for skilled labour, associated with the colonial modernity project of modernization theory with emphasis on the economics of education and manpower planning. Methodologically, liberal literature concentrated in providing survey and statistical evidence about the connection of education and economic development. For example, aptitude surveys and studies of the primary mental abilities of Africans in different age groups and under a variety of cultural and social environmental conditions were undertaken to determine manpower needs for industrial and agricultural development and African youth training needs (Cross, 1999).

Second wave (1976-1994): emergence of radical scholarship in educational studies

The second wave, throughout the 1970s and 1980s, was dominated by studies of resistance to the apartheid barriers to formal access to higher education targeted mainly at students from the so-called designated groups (African, Coloured, and Indian) in the context of the so-called radical-liberal debate, which gave rise to three important trends in radical theory (Kallaway, 1984). The first was the fierce critique of Afrikaner conservative nationalist approaches rooted in the doctrine of 'fundamental pedagogics' charged with promoting inconsequential empiricism and positivism. Briefly, the underlying epistemological assumption in fundamental pedagogics is that, in the research process, the researcher has to bracket 'all faith, superstition, dogma, opinions, theories and philosophies of life and the world' to be able to objectively discover the 'universal essences' of social phenomena, i.e., objective theory (Viljoen & Pienaar, 1971: 38). The scientist could then apply these essences into the everyday life-world to enrich the culture of the group to which he/she belongs - certainly within separate development (Viljoen & Pienaar, 1971; see also Beard & Morrow 1985; Chisholm, 1985). The second was a fierce critique of liberalism in academic scholarship. Liberal analyses came under fire, being accused of narrow positivist empiricism, being perceived as a discourse of identity construction or a voice of conscience, rather than a mode of explanation. As Hughes puts it: 'the liberal tradition in general is long on morality and short on explanation' (1977: 47).

The third was the emergence of Althusserian structuralist approaches followed by post-structuralist Gramscian accounts in two competing streams - Charterist (loyal to traditional Marxism) and Black Consciousness (that gave prominence to race over class) within the newly-inaugurated neo-Marxist political economy tradition which gained popularity to explain systemic and institutional manifestations of apartheid in education (Althusser, 1977). A revisionist stream expressed concerns with the absence of the human dimension in theory, of the prevalence of 'theory without passion', i.e. accounts where lived experience of people, individual and social agency are subsumed under what Bourdieu would call 'theoretical theory' (Le Cordeur, 1985:2). Similarly, the liberal tradition was charged with providing descriptive narratives with little

explanatory value in dealing with the complexities of apartheid education - 'passion without theory'. Concurrently was also reproduction theory borrowed from Bowles and Gintis to grasp the functions of apartheid education and Giroux's resistance theory to dissect the affirmation of student agency in forms of protest and contestation of apartheid education (Giroux, 1985; 1983; 1981). The paper argues that responses to the Soweto uprising and the crisis that followed gave rise to new political epistemology translated into new theoretical and emancipatory imaginations with considerable repercussions in the scholarship of higher education access. While neo-Marxist structuralist and post-structuralist influences (Althusser) can be identified, the bulk of research manifested the popularity of reproduction and resistance theories with little reference to higher education access issues (Bowles & Gintis, 1976).

Methodologically, radical, and neo-Marxist critique was articulated in local journals, such as *Perspectives in Education and Africa Perspective*, and research studies on "student culture" and "youth culture" emerged (Cross, 2018: 50). Overall, one could distinguish between different strands in the broad literature on access in this period ranging from scholarly published literature, policy-related studies, and student debates about the meanings of access within the student movement. With relative exception of student debates about access (Khoapa, 1972; Ndebele & Moodley, 1975; cited in Cross, 2018: 4), the general emphasis remained upon physical access to the university space (or formal admission). A key contribution was Morrow's (1992, cited in Cross, 2018) notion of 'epistemological access', wherein he argued that access was more than just physical or formal access, it was about students learning how to become a participant in academic practice, which was later to be contested by Jansen (2001) who argued that institutions were central in mediating epistemological access.

Conceptually, this period began the articulation of a new generation of critique with Muller's notion of 'intellectual formation' (discussed earlier) wherein groups of scholars identify with a certain conception of knowledge and its relation to society, and an epistemology that is politically grounded, reflecting the interface of power, interests, and knowledge in society. Also important was the theoretical foundations of resistance and political economy perspectives to the domain of education analysis that emerged (Cross, 2018). Significantly, this period saw an unprecedented ability especially among progressive scholars to adapt and recontextualise global theoretical influences to the local context, which has somehow largely been dissipated since then. The question that this paper ultimately raises is whether this adaptive ability cannot be rediscovered in the current conjuncture that calls for de-colonial approaches rooted in epistemic justice and the contextual peculiarities of student agency.

Third wave (1994-2010): Surveying and measuring educational disadvantage - throughput and retention

The third wave responds to the re-composition of the student body in terms of race, gender and other forms of identity throughout the late 1980s and the early 1990s, which resulted in the increase of the so-called 'non-traditional' students or students from historically disadvantaged groups, perceived as underprepared for university education. It refers to the growing concerns

about the high failure and dropout rate of historically disadvantaged students. The challenges confronted by these students shifted the thematic area in research circles from barriers vis-à-vis resistance to the problematic of 'educational disadvantage', very often perceived as a manifestation of educational deficit, hence the predominance of the *deficit model* in research - literature on academic support/development, and academic practice, and the debate on bridging programmes (CHE, 2010). Notions of student unpreparedness, academic support, bridging programmes, including new approaches to student selection occupied privileged space in educational research (CHE, 2010). These changes led to the proliferation of institutional climate and culture surveys and studies on different aspects of institutional transformation (Cross, et al., 2003; Wits, 2006; UCT, 2003; Van Zyl, Steyn and Orr, 2003), throughput and retention studies (Van Zyl, et al., 2003; Alence, 2007). It was a generalized search for trends and patterns to ascertain how institutions were doing in dealing with the growing numbers of historically disadvantaged students. On the positive side, studies highlighted the importance of data in determining the patterns and trends as indicators of progress or failure. On the downside, it downplayed the significance of student experience and the impact of the institutional environment, and provided limited explanations on the drivers and mediators of change.

Besides a deepening of the debates provoked by Morrow's notion of 'epistemological access' in this period, there was a marked turn towards studies on academic development and support focusing on strategies to meet the needs of the so-called 'non-traditional students' and revisiting of earlier performance discourses and academic support strategies (Cross, 2018). The first trend included studies attempting to measure student success or failure via input and output indicators (throughput rates, graduation rates, dropout rates etc.) and assess the 'efficiency of the system' through key variables relating to academic performance such as funding, programme profile and outputs. They included national and institutional surveys on student enrolment and progression, student and staff surveys on campus climate, campus diversity, institutional culture' and university internationalization. The methodological mantra on South African higher education institutions became couched in terms of systemic inefficiencies, that spoke to these indicators (Cross, 2018). Thus, this tradition, consisting of quantitative studies, was concerned with measuring academic performance through suitable input and output indicators.

The second tradition emphasised explanation over measurement. Within this tradition, it is possible to identify different threads. There are those who seek to explain academic performance in terms of some attribute of the individual student such as motivation, cognitive ability, personality, aptitude, time management, reading or writing skills (e.g., Mitchell, Haupt and Stephenson, 1994; Van Rooyen, 2001; Crous, 2004; cited in Cross, 2018). There are those who do so by focusing on the individual student as a member of a certain (assumedly stable and culturally defined) group defined in terms of class, race, or gender. The educational and socio-economic backgrounds of students are seen to be important factors in understanding and explaining patterns in student performance. This second trend thus involved studies attempting to locate the concept of epistemic access within the general normative paradigm of social justice underpinned by the values and principles of democracy, access, equality, equity, and human rights (Cloete et al., 2002;

Moll, 2004; Smith and Tactics, 2003; University of the Free State, 1997; cited in Cross 2018) drawing on identity or culturalist perspectives.

It is possible to discern a renewed attention being given to the material and cultural contexts of higher education transformation from 2001, evident in journal articles, PhD dissertations, NRF funded projects, research groups and institutionally-supported research, focusing on student and staff experiences of campus “cultures” , “climates” and learning experiences. In other words, there was renewed attention to the nature of the higher education space that shapes the quality of access. Access to higher education came to be seen as being both about the increased participation of students from historically excluded groups and about the nature of the higher education space which shapes the quality of the academic experience. The advantage of some of these studies is that in their interest for systemic improvement they developed a multi-layered conceptual approach. Based on comparative studies of enrolment, their conceptual framework straddles both a micro and a macro level of analysis. For example, for Cloete, et al. (cited in Cross, 2018), the set of factors that shape the enrolment systems in higher education must be divided into 3 groups: (i) government policy, (ii) the culture and capacity of institutions, and (iii) the market and other societal influence. The third trend included an unprecedented proliferation of introspective institutional research on academic performance officially undertaken by the institutions, driven by Senate, Academic Planning Units, or higher education centres, established to operate as think tanks for institutional policy development. These include institutional climate and culture surveys and studies on different aspects of institutional transformation. (Cross, 2018)

As will be seen, many of the methodological and conceptual markers that emerged in this period were to be consolidated in the next wave: the advent of culturalism.

Fourth wave (2010-2014): The advent of culturalism

The fourth wave, from 2010 to 2014, was characterized by the advent of culturalism in educational studies. An important landmark was the CHE decision to promote and sponsor studies on throughput and retention from a culturalist perspective in 2010 with focus on student experience. It represented a combination of institutional surveys on perceptions about campus climate and institutional culture, and most importantly attention to student university experiences. Attached to culturalism was the notion of epistemic access, beyond traditional conceptions of access confined to formal access. As stated elsewhere, formal access is ‘a process driven by policy (e.g. where entry requirements or other such criteria are met), or by some agency other than the ‘self’ , taking into consideration issues of entitlement, equity and equality of opportunity’ (Cross, 2018: 15). ‘Epistemological access’ , as stated earlier, refers to the process of learning how to become a successful participant in the academic practice of a tertiary institution. It requires *inter alia* an understanding of how the university operates or ‘thinks’ , and the use of their own initiative and individual responsibility – individual agency for students to achieve their academic and social goals. Epistemic access can be facilitated or enhanced by adequate institu-

tional mediation (through academic support and availability of resources and facilities) - institutional responsibility. In contrast, Jansen emphasized the role of institutional mediation to challenge what he perceived as abdication of institutional responsibility in addressing student epistemic access (2001: 3-4). Methodologically, the debate prompted research into areas such as 'student culture', 'institutional culture', 'the culture of the academic profession', 'the culture of individual disciplines', and others. Key theoretical insights for this body of research include the effects of the transition from school to university, the differences in the structure and knowledge organization and modes of mediation in teaching and learning characterised by greater pedagogic distance compared to schools as well as the norms and codes of practice that individualise student work and place emphasis on student agency.

There have also been attempts to exercise vigilance in the use of existing theoretical models. In the 'Epistemic access project', this was well illustrated in the article "The pedagogy of the Marginalised" (Cross & Atinde, 2015), a product of the pilot of the project. The article reframes Bourdieu's sociological theory which became popular in studies of higher education access in South Africa. Contrary to Bourdieu's theory of social capital, which has been used to show that only students from affluent backgrounds who carry strong forms of social capital are more likely to be successful on campus environment, the article based on the project demonstrates that some of students from historically disadvantaged backgrounds derive attitudes and strategies from their experience in poor communities that enable them to succeed at university. It offers a valuable qualification of Bourdieu's theory of social and cultural capital and habitus by showing how disadvantaged students acquire alternative forms of capital and dispositions that help them to navigate the challenging environment of the university.

Conceptually, what emerged during this wave was that with the provision of free education for the poor, the question of formal access had been substantially addressed; it was the question of epistemic access that required more attention, particularly epistemic access of historically marginalized students.

Fifth wave (2014-2019): Resurgence of decolonizing perspectives

As with the 1976 Soweto uprising and the crisis that followed, which led to the emergence of radical discourses in education, the 2014-15 student protests provided an opportunity for alternative understanding of the South African situation and new theories of change. As argued elsewhere, student protests laid "the foundations for a particular social epistemology; and a political epistemology - both of which are gaining increased momentum in South African universities (Cross, 2018). The key pillars of this intellectual movement include: (i) the notion of 'decolonisation' as an important factor missing from the transformation discourse; (ii) decolonisation and transformation as complementary (and not contradictory) concepts; and (iii) decolonization as a condition without which social justice cannot be fully realised. Such epistemology has been largely embraced throughout universities and has dominated research activities, debates, higher education summits, student and staff academic work, and major institutional reform. Underpinning such epistemology is the recognition of colonialism as a global phenomenon manifested in

‘the long standing patterns of power that emerge as a result of colonialism, which define culture, labour, inter-subjectivity relations, and knowledge production well beyond the strict limits of colonial administrations’ (Maldonado Torres, 2007: 243; see also Ndlovu-Gatsheni, 2018). Decolonial approaches came to be seen as relevant to research by foregrounding race and gender and concerns with epistemic justice, given the legacies of apartheid and colonialism still entrenched in universities. This body of research is concerned with the slow pace of transformation in higher education in South Africa, particularly issues relating to the decolonisation of the curriculum, persistence of Eurocentric frameworks and embracing of indigenous knowledge systems. These dynamics are seen to impact student access. An example of this research is the book edited by Tella and Motlale (2020), *From Ivory Towers to Ebony Towers: Transforming Humanities Curricula in South Africa, Africa and African-American Studies*. As Tella observes, referring to the impact of the student-led #Must Fall Campaigns across the country since 2015, universities are ‘failing in their primary responsibility to enhance social change as higher education spaces continue to perpetuate marginalisation and exclusion’ (2020: 1).

Another important body of research which commenced in this period and is in the process of finalisation is the Council on Higher Education (CHE)-funded study on ‘Understanding epistemic access and success of historically disadvantaged students in South African universities at the University of Johannesburg’.¹ This study is due to be completed in 2022. Adebajo suggests that an important lesson from the research is that changes are needed both from a demographic perspective (race, gender, and language), as well as ideological change to overturn a structural process of domination (2020). As highlighted by Cross and Ndofirepi:

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. (2017: 83)

Cross and Ndofirepi provide a compelling argument that these colonial and apartheid legacies have ‘profound implications for knowledge conception, formulation and validation’ (2017: 83). Overall, this body of research, including similar research in the Latin American context, provide a more nuanced analysis for addressing issues relating to marginalisation and the ‘other’.

Unfortunately, very little progress has been achieved in developing decolonizing methodologies (see for example, Mngomezulu, 2020). Mngomezulu explains that while some academics are conducting research on the decolonisation and Africanisation of the university curriculum, there is still a long way to go (2020). He cites, for example, the efforts by some scholars to use ‘current African political issues to explain political concepts and political phenomena such as

¹ This study which was led by the late Prof Michael Cross and co-author of this article is now led by Dr Logan Govender, the second co-author of this article.

governance, lootocracy and civilisation' (2020: 92). He further suggests that books written by Africanist scholars could be prescribed for teaching, more postgraduate students encouraged to research topics that address African issues than is currently the case, introducing oral histories into the curriculum, and where topics relating to other parts of the globe are selected, locally grounded research methodologies and frameworks could be used. Efforts have also been made to reconceptualise institutional culture in the context of Africanisation and African renaissance discourses (see for example Makgoba, 1997; Seepe, 2000; UKZN, the Africa Commission Report, 2006; cited in Cross, 2018). In similar vein, Maringe writing from a broader African perspective, suggests five key points regarding the decolonisation of knowledge production systems in African universities:

- Encouraging commitment to the goal of decolonising our institutions
- Creating continental momentum for knowledge decolonisation
- Rethinking models for doctoral training
- Committing to developing new content and pedagogies that will underpin the decolonisation process
- Investing time and resources in resolving the language issue in our universities. (2017: 15)

Thus, the decolonisation research project in South African and Africa at large is still very much a work in progress.

Sixth wave (2019- present): The COVID-19 pandemic and prevalence of technology mediated and online practices in social research

The last wave, from 2019 to the present marks the transition to the new normalcy requiring greater attention to digital or online mediation in research, determined by the COVID-19 pandemic and steered by decolonial discourses. It represents perhaps the most profound paradigmatic, epistemological, and methodological shift in the conception, approach, and processes of social research. Given the paucity of systematic research production under COVID-19 in South Africa, this section highlights emerging insights in national and international literature to develop a framework on researching the marginalised in technology mediated environments.

The pressures of COVID-19 and the sudden reliance on technology have revealed important new aspects of technology-mediated educational research. On the positive side, there are certainly benefits brought about by technology mediation. These include for example: new research opportunities (e.g. greater accessibility to research participants, possibilities of virtual collaboration, online focus groups and video-conferencing); easy, convenient, comfortable, less-intrusive, safe and engaging communication - participants share more details in blind and anonymous conversations (Woodyatt, et al., 2016; Newman, et al., 2017; Adams-Hutcheson & Longhurst, 2017); operational efficiency as interviews can be conducted at any preferred time, space and place regardless of distance with easy follow up (Badat, 2020); the potential to scale and

expand the number of participants - ease of recruitment and ability to recruit from various locations (Lijadi & van Schalkwyk, 2015); information transactional efficiency and immediacy (easy contact, scheduling and transmission of logistical information); and easy data storage opportunities. One can add data saving methods such as WhatsApp and Telegram to this list. These benefits become optimal in ideal circumstances where both researchers and participants possess the required technology know-how and experience, and data as well as connectivity problems are absent. This scenario is likely to happen when researching students from rich and affluent backgrounds, which falls beyond the boundaries of this paper.

On the downside, the limitations include reduced face-to-face interaction with limited opportunities for reading body language and facial expressions (Reid & Reid, 2005). Although the situation is improved somewhat when videos are switched on, videos are usually confined to participants' faces, not their entire bodies (limited eye contact), so it does not replicate the advantages of physical proximity - moreover, video cameras are not always switched on. Other limitations include the inability to take field notes (inaccessible or distorted field or context); exclusion of those with little or no access to technology (Lijadi & van Schalkwyk, 2015; Collins, 2020); potential inaccessibility of participants - vulnerable groups often find research intimidating and difficult to engage (Newman, et al., 2017; Kirkevold & Bergland, 2007). Through privileging blind social interaction accompanied sometimes by invisibility and impersonal communication, technology mediation widens social distance and disrupts human connection between researchers and participants. It places them within a peculiar situation where they both experience social displacement regarding the context of research, their location in it, communication, and social interaction as well as personal identities. The concept of blind social interaction is used here to refer not just to cases of 'no picture' or 'video off' communication but also to the whole host of features experienced in technology mediated social interaction from shifting power relations, threat to ethical and moral commitments to absence of body language and messaging. People also talk through bodies (smile, eye contact, gestures, or even artefacts on the table). Of significance in this regard is the fact that the relationships between researchers and participants still remain intentionally or unintentionally conditioned by the imagery of race, class and gender, and other forms of social difference in real life experience. Some strategies that can help mitigate the lack of face-to-face engagement are promoting interaction between students and creating learning communities, and encouraging use of Chat features to type in emojis, like a thumbs-up or thumbs-down or raising a hand to foster greater engagement. Overall, though, these dynamics have considerable impact on the behaviour of both the researchers and the participants in the fieldwork context. In particular, researchers could become less attuned to participants' emotional and psychological reactions during interviews, and participants are deprived of receiving the benefits of total body language from face-to-face interactions. The paper thus argues that a major change brought about by COVID-19 and reliance on technology is the rupture of the connection between the epistemological and ontological conditions of both the researcher and the participant, which poses methodological challenges outlined above. This is, however, an opportunity to rethink some of the ways research can be undertaken in the future.

In retrospect: insights, silences and distortions

Higher education access research emerged in South Africa as a measurement resource for understanding the changing student composition and its wider socio-economic implications. There is certainly merit in determining the magnitude of this evolving problem through statistical analyses and modelling, and more merit when such measurements integrate voices, ideas and perceptions that indicate some awareness or even knowledge of the problem. They provide useful indicators about what goes on in the system. It is however the focus on experience and contextual complexities brought about by culturalist perspectives that has enhanced our understanding on why things took the course they did. These are plausible efforts that have enriched the South African scholarship and represent a major contribution to the global knowledge. Intriguing are however a number of pitfalls worth mentioning. First, beyond the fierce critique of deficit theoretical perspectives and with the exception of the Afrikaner philosophy of fundamental pedagogics rooted in German philosophers, the scholarship of higher education access depended exclusively on almost mechanistic application of Western theoretical models with little effort at deconstruction, recontextualization or reconceptualization. This applies to Marx, Althusser, Gramsci, Bourdieu, Foucault, Bowles and Gintis, Giroux, Aronowitz, and others, whose theories have been tried in different ways to explain the question of formal and epistemic access. Decolonial theories and decolonizing methodologies remained absent until the last decade.

Researching historical marginalisation: ontological and epistemological foundations

One aspect that appears overlooked in the South African studies of historically marginalised students is both the ontological and epistemological condition of the marginalised, or, in other words, the connection between place, personhood and marginalisation (Peterson, 2015: 491). For clarity, epistemology refers here to a theory of knowledge that sets the parameters about who can be a 'knower' ; what tests beliefs and information must pass to be validated as 'knowledge' and what can be known (Strega, 2005: 201). It sets the parameters 'as to what counts as knowledge, which can be considered as a refined version of common sense which happens to be the common (sense) of the dominant groups projected as natural truth' (Vadytia, 2018: 273). It is 'consciously employed as ideology and unconsciously accepted by the dominated as commonsense to justify and establish dominant value system firmly as normal' (Vadytia, 2018: 274). Ontology refers to a theory of what the world is about and why or put differently one's world view. It is the worldview that shapes the research project at every level, and consciously, and subconsciously, shapes its epistemological, theoretical, and methodological foundations. Two fundamental aspects are worth highlighting here regarding research on marginalization: (i) the alignment of ontology-epistemology-theory- method, which is not always paid attention, resulting in the essentialisation of the marginalised students as a homogenous whole, and (ii) the neglect of the epistemological and ontological conditions of the researcher and the

participants, which are radically separated within current research traditions. Within these, researchers establish a hegemonic hold on the marginalised through successfully positioning their epistemic privilege and dominant worldview as the most legitimate and natural way to view and understand the surrounding world. As argued elsewhere:

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'. (Cross & Ndofirepi, 2017: 84)

Researchers under apartheid and colonialism, for example, may have evolved with the mentality that those originating from the same social category and with the same sociocultural experience were the only ones who could discover truthful knowledge about that group, a position that has been widely contested. Moreover, an important finding in scrutinising the literature is that given the colonial and apartheid legacies, researchers, conditioned by artificial boundaries of race, class, gender and other factors, may either intentionally or unintentionally, make knowledge claims that lack validation and fail to take account of the social and contextual realities of the Other (Cross & Ndofirepi, 2017). Moraes and Freire (2017, citing Santos, 2006) see the challenge as part of the broader scope of the sociology of absences, and the non-recognition of diverse cultures and experiences by the dominant Western scientific model, that is, the monoculturesure of knowledge and scientific rigour as the only possible way to truth.

Marginalisation is both *structural* as it is embedded in larger social structures and determined by power and social relations; and *epistemic* in that it gains legitimacy through knowledge production and representation (Vaditya, 2018: 1). Attention should thus be given to the social relations in the research process and the experiences of marginalisation, 'in the daily context of exclusion, humiliation, structural inequalities, injustice and exploitation, in both material and cultural contexts' (Vaditya, 2018: 273). Arising from this are critical questions about the emplacement into and reproduction of marginalisation: What places and keeps students under such circumstances? What maintains such circumstances and reproduces marginalisation? And most importantly, how do students position themselves towards and act to change those circumstances? What resources do they draw on under marginalisation? What understandings do they attach to these issues? What future lies ahead for them? Thus, an important epistemological implication emanating from the ontological condition of marginalisation is that researching the marginalised Other is not just research on the marginalised Other but *research for* and *with* the marginalised Other. To borrow from Vaditya, research on the marginalised Other is research 'that takes seriously and seeks to trouble the connections between how knowledge is created, what knowledge is produced, and who is entitled to engage in these processes' (Vaditya, 2018: 283).

Dealing with the 'new normal' : researching marginalisation in a technology mediated environment

Emerging from the scholarship of student epistemic access, particularly the 2010 CHE study, is the notion of 'social presence' forged out of the critique of apparent pedagogic distance displayed by some institutions that seemed to abdicate from their institutional responsibility in mediating teaching and learning. Through its discussion on the notion of "pedagogic distance", the CHE (2010: 181) study indirectly draws attention to 'social presence' by highlighting how historically marginalised students, by virtue of race, ethnicity, gender or class, experience alienation, as opposed to presence or belonging, stemming from exclusionary language policies or universities' failure to teach students about, and make explicit, the often hidden rules and routines of academic and social engagement on their campuses. In relation to a technology-mediated environment, 'social presence' (Richardson & Swan, 2003), determines 'the degree to which a person is perceived as a "real person" in mediated communication' (Gunawardena, 1995: 151), i.e. a person able to make an emotional connection throughout the research process (e.g. interview conversation), express passion, laughter, sorrow or distress related to it. As well articulated by one researcher, while 'some individuals prefer to be heard and not seen to gain confidence', the expression of these sentiments as messages can hardly be communicated by means of voice or silence. 'Listening, seeing and meaning making go together in the interview process', he emphasised. As discussed earlier, social presence in a technology-mediated environment requires creativity and using the diverse features of online platforms, such as Chat and emojis to maximum effect.

The paper thus argues that perceptions and feelings of connectedness between the researcher and the participant, openness and better communication and messaging, require greater sense of social presence (Hostetter & Busch, 2006). As the process of reducing distance between participants, particularly in researching marginalisation, social presence adds an important ethical dimension: expressions of empathy and compassion for the marginalised ('a commitment to social justice brings me here'), personal immediacy ('I am here if there is anything I can do'). Social presence builds greater trust and intimacy, through body language ('smile instead of frowning'), direct body orientation, eye contact, gestures and positive head nods and related body language (Witt, et al, 2004). Social presence enables engagement of the researchers not just as individuals who by virtue of the knowledge, know-how, procedures, and methods they possess endeavour to know the Other, but as social beings aware of their circumstances in society and are capable of locating their research engagement in this context. The promise is that emerging from this analysis, the theory of social presence connected to the humanism embedded in the African philosophy of Ubuntu would bring some light to the intricacies of technological mediation under and beyond the severity of COVID-19 in several domains of researcher-researched interaction, emotional, political, pedagogical, linguistic, and physical. One way in which Ubuntu and the theory of social presence can be embedded is in recognising the importance attached to respecting the voice of 'elders' and 'listening', in other words, one

does not have to be speaking or become argumentative too quickly to be socially present – the Ubuntu way is to be present just by listening and contemplating before rushing to speak (see, for example, Waghid, 2017).

Conclusion

There is certainly evidence of a powerful theoretical consciousness emerging out of the South African scholarship of student epistemic access and success. An important aspect of this is expressed by an increasing sense of vigilance as a requirement for achieving truthful outcomes in knowledge production. Vigilance has enabled educational researchers to be critically reflexive about their own epistemological positions and attempt the necessary epistemological and methodological breaks. Golden moments in the development of this consciousness are the advent of radical and neo-Marxist scholarship following the 1976 Soweto uprising and school crisis, the emergence of decolonial theory formations following the #FeesMustFallMovement, and the current search for more nuanced social and epistemic justice discourses. These discursive shifts have been accompanied by the re-visiting of methodological strategies for achieving a more nuanced gaze of social complexity. Emerging from the literature are two critical dimensions in researching marginalization:

- The value of theory recontextualization, adaptation or transformation. The forging of the notion of ‘compensatory capital’ vis-à-vis Bourdieu’s social and cultural capital represents certainly a meaningful step in the efforts towards understanding the complex dynamics of marginalisation. It certainly sends a significant warning sign against mechanistic application of ready-made and pre-established theories of marginalisation. Vigilance has been recognised in addressing the legacy of ‘established theories’, ‘absolute methods’ as well as subjective inclinations that have dominated South African scholarship.
- Working with the concepts of ‘background’ (as a measure of readiness), ‘context’ and ‘experience’ in decolonial research practice. Background relates to different ways of being in the world which maybe empowering or disempowering for student’s agency on campus. Particularly with reference to race, gender, and ethnicity – key categories of practice under apartheid, greater attention is needed regarding individual and shared experience or common experiences determined by historical marginalisation, given the considerable impact these categories have had on subjectivity and agency at the individual levels, and given their constraining structural dimensions. Context frames one’s ontological and epistemological condition. It points to the need for greater reflexivity about personal biases, values, experiences, and constructions within the historical and ideological conditions in which we live, influence, and direct or conduct research.

An emerging trend emphasises the need to privilege student voices, which is plausible. This is a strategic choice to capture the role of student agency in its multiple dimensions (individual, social or collective and as part of institutional agency). Rather than assuming essentialised accounts

'on' , 'about' and 'for' students, the narratives of student experiences provide an irreplaceable basis for understanding how students position themselves in their particular locations as they interface with other members of the university community. Knowledge is socially situated, and 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. Privileging the voices of historically marginalized students should be made not just on the grounds that their content will necessarily be liberatory, but on the grounds that the very act of speaking is emancipatory. Certainly, research responsibility demands awareness and exercise of caution about the ways these voices achieve authority, navigate between emotions, the power of wrong, false and incomplete accounts. Again, these are situations that call for degrees of vigilance and epistemic breaks in scrutinising everyday life experience accounts; and could go a long way in cultivating more rigorous re-contextualization and adaptation of theoretical models generally, while foregrounding the contextual peculiarities of student agency and experience.

Author biographies

The late Professor Michael Cross was the founder and Director of the Ali Mazrui Centre for Higher Education Studies, University of Johannesburg, and a co-founder and co-editor of the book series, African Higher Education: Developments and Perspectives with Brill/Sense Publishers. He was previously attached to Wits University (1986-2012).

Prior to joining the Ali Mazrui Centre for Higher Education Studies, Dr Govender was the Education Thematic Head of Save the Children South Africa (2016-2019). He has spent most of his academic career at the Human Sciences Research Council, Pretoria (1993-2006; 2012-2013), focussing on education policy research.

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