



SECOND
EDITION

Indigenous Research Methodologies

Bagele Chilisa



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Second Edition

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Bagele Chilisa

University of Botswana



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PREFACE

The community of social science researchers is experiencing a struggle as it comes to terms with social justice issues that arise from the research process itself, as well as from the findings that are produced by their efforts. While more and more non-Western researchers from the third world and from indigenous societies are expressing criticism about what is viewed as colonizing epistemologies and methodologies, we (speaking as one of them) are also cognizant of the need to bring indigenous methodologies into the research arena as a means of addressing the goals of enhanced human rights and social justice. There is an increasing emphasis on the need to sensitize researchers and students to diverse epistemologies, methods, and methodologies, especially those of women, minority groups, former colonized societies, indigenous people, historically oppressed communities, economically oppressed groups, and people with disabilities, who have been excluded from dominant epistemologies.

However, there are questions about the nature of these marginalized epistemologies, their philosophical base, the standards by which they are to be validated, and the direction in which they move the scholarship of research methodologies. This book addresses some of these concerns by bringing together postcolonial indigenous epistemologies and methodologies from across the globe and creating a platform to discuss them, along with other emergent methods and methodologies in the social sciences. It is a single-authored research methods book that situates research in a larger historical, cultural, and global context and provides case studies through which students can see for themselves the dominance of Euro-Western research methodologies and hence appreciate the call for decolonizing research methodologies. The major focus of the book is on extending the theoretical and philosophical critique of decolonizing methodologies by making visible specific methodologies that are commensurate with a postcolonial indigenous paradigm. These methodologies are discussed within a postcolonial indigenous paradigm, which puts forward relational ontology, epistemology, and axiology as a philosophical framework to bring together methods, techniques, and methodologies by global postcolonial and indigenous scholars and emergent methods in Euro-Western research.

GOALS OF THE BOOK

The goals of the book are to do the following:

- Promote the recovering, valuing, and internationalizing of postcolonial indigenous epistemologies, methodologies, and methods
- Explore and critique some of the dominant paradigms, using arguments based on the philosophies of the researched, as well as their ways of knowing and their experiences with colonization, imperialism, and globalization

- Present a postcolonial indigenous research paradigm as an overarching framework to explore the philosophical assumptions that undergird the use of postcolonial indigenous methodologies
- Theorize postcolonial indigenous ways of doing research, explore the application of these methodologies through case studies, and give illustrative examples
- Foreground interconnectedness and relational epistemologies as a framework within which to discuss postcolonial indigenous methodologies from across the globe
- Illustrate power relations in the research process

Since the publication of the book eight years ago, there have been debates on the position of *Indigenous Research Methodologies* in the paradigm discourse. There are also new developments in indigenous quantitative research framed from indigenous ontological, epistemological, and exological perspectives. The second edition continues the efforts to bring together voices of global postcolonial and indigenous scholars on these debates and new developments. The second edition is also informed by comments, from lecturers and research and evaluation practitioners who have used the book as a research course main text or as a supplementary text, and research and evaluation practitioners who continued to engage with me in workshops and conferences. From the richness of these comments, I have added three new chapters. I have also added various websites and web sources to stimulate discussions and enrich literature on indigenous research methodologies.

The first chapter from the 1st edition has been split into two chapters. The new Chapter 1 will focus on indigenous methodologies and the form they take. Chapter 2 introduces the debates on current Euro-Western research paradigms and the philosophical assumptions that inform these methodologies. The main thrust of the chapter is that current dominant academic research traditions are founded on the culture, history, and philosophies of Euro-Western thought and are therefore indigenous to Western societies and their academic institutions. These methodologies exclude from knowledge production the knowledge systems of the researched colonized Other. Three approaches in postcolonial indigenous research methodologies are discussed: (1) decolonization and indigenization of Euro-Western research approaches, (2) research approaches informed by a postcolonial indigenous research paradigm, and (3) third-space methodologies.

The new Chapter 3 (previously Chapter 2) presents case studies that demonstrate how colonial research served the interests of the colonizers, how globalization continues to serve the interests of former and present-day colonizers, and how postcolonial theorizing and critical race theory can be used to conduct research. The new Chapter 4 (previously Chapter 3) highlights how mainstream research in postcolonial societies still ignores, marginalizes, and suppresses other knowledge systems and ways of knowing. The chapter demonstrates how HIV/AIDS prevention has been highly compromised by employing language and categories of thinking that are alien to the infected and affected communities. It also shows how a dichotomous hierarchy informed by colonization, imperialism, and globalization privileges the first world position as knower and relegates the third world to the position of an Other who are learners; it also reflects the people's resistance to imposed frameworks and its consequences. The new Chapter 5 (previously Chapter 4)

explores the meaning of postcolonial indigenous research methodologies and the philosophies and worldviews that inform these methodologies. The meaning of indigenous knowledge and its role in research are also discussed. Chapter 6 is a new chapter on decolonizing evaluation methodologies presenting ways in which the formerly colonized of the world including Africans, indigenous people of Canada, Australia, Asia, and North America are exploring ways to decolonize and indigenize evaluation. Chapter 7 is a new chapter on indigenous mixed methods. It argues for indigenous and Western knowledge to be integrated to enhance participation of indigenous peoples as knowers and for the relevance of research to their needs and dissemination of research findings to academic and community settings. Chapter 8 is also a new chapter on mixed methods in evaluation. It demonstrates how relationships are key in indigenous evaluation.

The new Chapter 9 (previously Chapter 5) emphasizes the role of language, oral literature, and storytelling as foundations and sources of the literature, philosophies, theories, and methods of data collection, analysis, and interpretation regarding the researched, who constitute a two-thirds majority of the world population. The new Chapter 10 (previously Chapter 6) underscores the relationship between methodology, methods, and philosophical assumptions on the nature of reality, knowledge, and values. The chapter presents examples of culturally responsive indigenous methodologies and discusses how rigor and credibility are addressed in these methodologies. Culturally responsive methodologies of the Pacific Islands are added to the discussion in The new Chapter 11 (previously Chapter 7) which critiques the conventional interview method from a postcolonial indigenous research perspective and offers alternative interview strategies suited to the worldviews of the researched. In the new Chapter 12 (previously Chapter 8) participatory research approaches that enable oppressed and disempowered groups to collectively share and analyze their knowledge, life experiences, and conditions and to use indigenous knowledge as a basis to plan and to act are discussed. Two types of participatory action research are presented, one with an emphasis on participants as coresearchers and another with an emphasis on personal and social transformation. The new Chapter 13 (previously Chapter 9) highlights attempts to decolonize Euro-Western methodologies from the perspective of non-Western marginalized feminisms. The argument is that women in postcolonial and indigenous societies have been silenced by Western feminist theory, in addition to Western patriarchies, third world patriarchies, colonialism, imperialism, and globalization. The chapter is devoted to defining postcolonial indigenous feminist methodologies and articulating the worldviews, perspectives, and epistemologies that inform these methodologies, as well as research methods that privilege non-Western women. The new Chapter 14 (previously Chapter 10) draws from discussions in the book to synthesize working relations and partnerships between researchers and the researched and between institutions and communities, as well as ways of integrating knowledge systems such that indigenous knowledge, methods, and techniques are integrated into the global knowledge economy. The chapter further outlines a matrix for planning research from a postcolonial indigenous research perspective.

AUDIENCES FOR THE BOOK

Indigenous research methods and decolonizing research are relatively new areas. This book fills a gap in research methods and should find a ready market in the academy as it addresses the rising need to engage students in multiple epistemologies. It also provides the increasing number of transnational and international scholars carrying out research in third and fourth world countries, among indigenous peoples, and among historically oppressed groups with an introduction to methodologies that communicate the experiences of the researched. I would recommend this as a primary textbook for advanced undergraduate, master's, and beginning doctoral students taking research methods courses in education and the social and behavioral sciences. With the limited number of books that synthesize postcolonial indigenous methodologies, this volume can serve as a research methods book for students enrolled in postcolonial studies and cultural studies programs, indigenous education programs, and international education programs and for students and scholars conducting ethnoscience and ethnomathematics research. There is a growing interest in indigenous knowledge systems and postcolonial studies in general. There is, for instance, a move to create interdisciplinary postcolonial studies in most nation-states and within the United Nations University. A methodology book that focuses on postcolonial indigenous philosophies and methodologies becomes a useful resource for the growing disciplines in indigenous knowledge systems and postcolonial studies. Researchers and evaluators working in culturally complex societies and with postcolonial indigenous societies will find the book useful if they wish to conduct research that brings about positive change to the lives of the researched people. The book is appropriate for international and professional markets because it brings together voices of postcolonial indigenous scholars with specific reference to epistemologies, methodology, and method and creates a common platform through which these are addressed, together with other emergent research methods. Researchers from across disciplines addressing issues of power from the perspective of colonizer/colonized, self/Other, gender, ethnicity, race, and disability will find the book useful.

FEATURES OF THE BOOK

- Provides a comprehensive overview and synthesis of indigenous research methodologies and indigenous feminist methodologies and illustrates their application through a fascinating array of global case studies
- Provides an overview and critique of predominant research paradigms and their methodologies; gives a clear justification for an indigenous paradigm; explores the theoretical and philosophical foundations of indigenous paradigms by clarifying their ontological, epistemological, and axiological assumptions and methodologies; and moves the decolonization of research agenda beyond theory to practice

- Demonstrates the application of postcolonial theory, critical race theory, postcolonial indigenous feminist theory, indigenous knowledge, and indigenous theorizing to planning and conducting research by showcasing global examples and case studies illustrating these theories from Canada, Australia, New Zealand, the United States, Africa, Asia, and the United Kingdom
- Presents conceptual and practical descriptions and suggestions on social justice partnerships and working relationships between the researchers and the researched; between communities and research institutions; between funding agencies, researchers, and communities; between indigenous researchers and international or transnational researchers; and between Western and non-Western researchers from developed and developing countries
- Offers suggestions on integrating knowledge systems in such a way that indigenous knowledge, philosophies, methodologies, and techniques become integrated in the global knowledge economy
- Begins each chapter with cutting-edge and thought-provoking quotations from eminent international scholars and a “before you start activity”; each chapter includes activities and suggested readings that stimulate critical thinking and a transformation of the mind

MY IDENTITY

I am a woman born in a small village in Botswana, a former British colony situated in southern Africa. My parents are subsistence farmers who worked hard to pay my school fees. At the age of 5 years, before I started school, my father taught me the vowels and letters of the alphabet; our classroom was behind the granary that stored all the produce from the fields. By the time I started school, I could count and recite the vowels and letters of the alphabet. As I was growing up, my father introduced me to the concept of decolonization of the mind, even though he never termed it such. At that time, it was common for women and men to apply skin lightening creams to their faces. My father often talked to me and my other siblings at length about why it was important always to be who we are and not to wish to be light in complexion. I was fortunate to pass my primary leaving-school examination and proceed to secondary school. While at school, I decided to convert to Christianity in the Roman Catholic denomination. I was requested to ask my parents to give me an English Christian name. My father made it clear that my name, Bagele, had a meaning to which the family and the community could connect and relate. He could not authorize any new name. He explained that he was called Tabagele and my mother Mmabagele and therefore were known in the community through the names that connected them to their daughter. My change of name would start a chain of other changes of names and would require the community to figure out new relationships with him and with me. This early lesson from my father gave me the courage to explore ways in which indigenous practices and values on connectedness and relational ways of knowing of the colonized Other could be valorized in research.

Writing this book has hence been a personal project that has enabled me to draw together my interests and training in research methodology at the University of Pittsburgh in the United States, my 20 years of experience conducting collaborative research in southern and eastern Africa with scholars from the United Kingdom and the United States, and my knowledge of the culture of my people in the village of Nshakashogwe, Botswana. Throughout my research journey, I noticed there were two knowledge systems in operation, one that resonated with the researched and another that was academic and informed by Western disciplines. The survivance of the nonacademic knowledge system of the researched inspired me to write this book.

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Bagele Chilisa is a professor at the University of Botswana where she teaches research methods and evaluation courses to graduate and undergraduate students. One of her main areas of research is on research methodologies that are relevant, context specific, and appropriate in African contexts; culturally complex communities; and methodologies that make visible voices of those who continue to suffer oppression and discrimination be it because of their sex, race/ethnicity, disability, sexual orientation, or social class. These are methods inclusive of other ways of knowing, perceiving reality and value systems and methods that empower communities to produce knowledge that they can own and use to improve their standards of living.

She is co-author and co-editor to three books in this area: *Educational Research: Towards Sustainable Development*, *Research Methods for Adult Educators in Africa* and *Indigenous Pathways into Social Research: Voices of New Generation*.

Other publications include the following journal articles: “Educational Research Within Postcolonial Africa: A Critique of HIV/AIDS Research in Botswana” (*International Journal of Qualitative Studies*); “Resisting Dominant Discourses: Implications of Indigenous African Feminist Theory and Methods for Gender and Education Research” (*Gender and Education Journal*); Decolonising Trans-disciplinary Research: An African Perspective for enhancing knowledge integration in Sustainability Science (“Sustainability Science Journal”); Community Engagement with a post-colonial, African based relational paradigm (“*Qualitative Research*”) Decolonizing and Indigenizing Evaluation Practice in Africa: Toward African Relational Evaluation Approaches *The Canadian Journal of Program Evaluation*; Mixed Methods in Indigenous Research: Building Relationships for Sustainable Intervention Outcomes, (“*Journal of Mixed Methods Research*”), and “Mbizi: Empowerment and HIV/AIDS Prevention for Adolescents Girls in Botswana” (*The Journal of Specialists in Group Work*). In addition, she has also authored the following chapters: “Indigenous Researchers: Contrasting Western and Indigenous Perspectives” (in D. M. Mertens and P. E. Ginsberg, *Handbook for Social Research Ethics*); “Indigenous Knowledge, HIV and AIDS Education and Research: Implications for Health Educators” (in E. Taylor and P. Cranton, *The Handbook of Transformative Learning*); and “Sex’ Education: Subjugated Voices and Adolescent Voices” (in C. Skelton, B. Francis, and L. Smulyan, *Gender and Education*).

She has received numerous grants to carry out evaluation research on HIV/AIDS, gender, education, sexuality, and assessment from the following international organizations: Department for International Development; Forum for African Women in Education;

UNICEF; UNDP; UNESCO; Economic Commission for Africa; World Bank; ILO; the National Institutes of Health (USA), and Spencer Foundation (USA). Most of the research involved partnerships between universities and collaboration with international scholars. She has conducted collaborative research with the University of Pennsylvania, Stanford University, Harvard School of Public Health, and University of Sussex. She recently won an NIH grant to build research capacity using culturally sensitive methodologies that can inform the design of cultural-specific and age-appropriate interventions that can reduce HIV/AIDS infection in adolescents in Botswana.

She has organized sessions in international conferences to advocate for postcolonial indigenous research and evaluation methodologies and African rooted evaluation approaches. She has also made presentations at the meetings of International Sociological Association Research Committee on Logic and Methodology; African Evaluation Association; World Congress of Comparative Education Societies; and the American Psychological Association. She is currently in the the United Nations Development Programme (UNDP) Evaluation Advisory Panel (EAP) under the Independent Evaluation Office. In the last five years, she has conducted workshops on Culturally and Contextually Responsive Indigenous Evaluation for the International Program Development Evaluation Training (IPDET) and Centre for Learning and Evaluation Results (CLEAR).

1

SITUATING KNOWLEDGE SYSTEMS

How is it possible to decolonize (social) research in/on the non-Western developing countries to ensure that the people's human condition is not constructed through Western hegemony and ideology?

Patience Elabor-Idemudia (2002, p. 231)

Overview

The main thrust of this chapter is that current academic research traditions are founded on the culture, history, and philosophies of Euro-Western thought and are therefore indigenous to the Western academy and its institutions. These methodologies exclude from knowledge production the knowledge systems of formerly colonized, historically marginalized, and oppressed groups, which today are most often represented as Other and fall under broad categories of non-Western, third world, developing, underdeveloped, First Nations, indigenous peoples, third world women, African American women, and so on. The chapter commences with discussion of some of the concepts and terms used in the book and an outline of the process and strategies for decolonizing Western-based research.

LEARNING OBJECTIVES

By the end of this chapter, you should be able to do the following:

1. Explain the decolonization of the research process and the strategies for decolonization.
2. Appreciate the need for researchers to interrogate the “captive” or “colonized mind” and engage in multiple epistemologies that are inclusive of voices of those who suffered colonization, the disenfranchised, and dispossessed, often represented as the Other, non-Western, third world, developing, underdeveloped, First Nations, indigenous peoples, third world women, African American women, and historically marginalized groups.

Before You Start

Relate your experiences with research either as a research participant, research assistant, or researcher. What did you like most about the experience? What were your challenges, and how did you address them? Reflect on indigenous research topics that you might want to do, and debate if the current social science research methodologies are adequate for conducting research on such topics.

INTRODUCTION

There is growing evidence that social science research “needs emancipation from hearing only the voices of Western Europe, emancipation from generations of silence, and emancipation from seeing the world in one color” (Guba & Lincoln, 2005, p. 212). Social science research needs to involve spirituality in research, respecting communal forms of living that are not Western and creating space for inquiries based on relational realities and forms of knowing that are predominant among the non-Western Other/s still being colonized. I have always been disturbed by the way in which the Euro-Western research process disconnects me from the multiple relations that I have with my community, the living and the nonliving. I belong to the Bantu people of Africa, who live a communal life based on a connectedness that stretches from birth to death, continues beyond death, and extends to the living and the nonliving. I am known and communicate in relational terms that connect me to all my relations, living and the nonliving. It is common for people to refer to each other using totems as well as relational terms such as *uncle*, *aunt*, *brother*, and so on. For instance, my totem is a crocodile, and depending on who is talking to me and on what occasion, I can be referred to using my totem.

The importance of connectedness and relationships is not unique to the Bantu people of southern Africa. Shawn Wilson (2008) notes that in the speech of the Aboriginal Australians, other indigenous people are referred to as cousin, brother, or auntie. Ideally, the multiple connections that indigenous scholars have with those around them and with the living and the nonliving should form part of their social history and should inform how

they see the world and how they relate with the researched. Euro-Western hegemonic methodologies, however, continue to dominate how we think and conduct research.

Recently, the United Nations Development Program (UNDP) approved a proposal from the Centre for Scientific Research, Indigenous and Innovative Knowledge (CESRIK) at the University of Botswana to conduct a survey on indigenous knowledge systems. The CESRIK committee, of which I am a member, met to discuss the approach to the survey. First, there was brainstorming on the different categories of indigenous knowledge. The next step was to discuss the approach that would be used for a survey on a given category of indigenous knowledge. Some suggested that we should conduct a workshop where academic experts on indigenous knowledge systems would give keynote presentations to an audience made up of community elders, experts in indigenous knowledge such as herbalists, members of the association of traditional healers, storytellers, and traditional leaders. Others warned that the process of knowledge production—the naming, concepts, thought analysis, sources of knowledge, and what is accepted as evidence by indigenous knowledge experts—could be different from what academic keynote speakers accept; others pointed out that the translation from English, the official language, to local languages could distort the communication even further. Still, others noted that indigenous experts from the communities could choose not to participate in the discussion unless they were assured of a copyright on the knowledge they brought into the discussions.

These discussions point to the operation of two knowledge systems. One is Euro-Western and indigenous to the Western academy and its institutions; the other knowledge is non-Western and peripheral, and it operates with the values and belief systems of the historically colonized. This peripheral knowledge system values relationships and is suspicious of Western academic discourse and its colonizing tendencies. Paddy Ladd (2003) notes that academic discourse systems

contain [their] own unspoken rules as to what can or cannot be said and how, when and where. Each therefore, constructs canons of truth around whatever its participants decide is “admissible evidence,” a process that in the case of certain prestigious discourses, such as those found in universities, medical establishments and communication media, can be seen as particularly dangerous when unexamined, for these then come to determine what counts as knowledge. (p. 76)

As more and more scholars begin to engage with imperialism and colonialism in research, make choices on what they research, and delve into areas that colonial epistemologies dismissed as sorcery, they are confronted by the real limitations of Western hegemonic research practices, for example, ethical standards such as the principle of informed consent of the researched.

Batshi Tshireletso’s study (2001) on the Mazenge cult is an example of challenges that confront researchers. Mazenge is a cult of affliction (hereditary spirits of the bush or spirits). Its membership is entirely women. In this study, Tshireletso wanted to show how the concepts of sacred space in the Mazenge cult are constructed and to establish the meanings of sacredness in the Mazenge cult. In doing this research, he was confronted by several challenges. Talking about the Mazenge cult is a public taboo. The word *Mazenge* is not supposed to be mentioned in public. Access to the Mazenge spirit medium in connection with the Mazenge cult is impossible when the medium is not in a state of being possessed. As a result, Tshireletso observes, he was unable to interview the Mazenge spirit

medium. The impression one gets is that he would have talked to the spirit, even if she were possessed. The following are the ethical principles that arise:

1. Is it ethical to seek consent from one who is being possessed?
2. If the principal informant, the Mazenge medium, cannot be interviewed while not possessed, how can data collection about the spirit be validated?
3. Is it ethical to write about the researched on the basis of what others say about them?
4. What is the message behind the community sanction against communication with Mazenge spirit mediums?
5. Is there a possibility that in researching Mazenge, Tshireletso was violating Mazenge community copyrights to their knowledge?

Tshireletso's study shows how mainstream practice and interpretations of informed consent and copyright are not inclusive of the knowledge stored in rituals and practices like Mazenge. Such examples demonstrate the need for the research community to expand the boundaries of knowledge production and research practices in order to stop further abuses of fundamental human rights of the researched in historically colonized societies. These rights should include the opportunity to have a say on whether they can be written about, what can be written about them, and how it can be written and disseminated; they should also have the option of being trained to conduct the research themselves. Currently, scholars debate the following questions:

- Is the knowledge production process espoused by mainstream methodologies respectful and inclusive of all knowledge systems? Are the following inclusive of all knowledge systems?
 1. The philosophies that underpin the research approach
 2. Methods of collecting data
 3. Sources of evidence
 4. The analysis, reporting, and dissemination process
- Are First Nations peoples, indigenous peoples, peoples of all worlds—that is, first world, second world, third, and fourth world, developed and developing countries, disenfranchised and dispossessed peoples—given equal rights through the research process to know, to name, to talk, and be heard?
- What are the concerns about current research methodologies?
- What challenges arise in using Western-based theory when research is carried out among those who suffered European colonial rule and slavery and are continuously being marginalized by the current research tradition?
- What are the challenges that researchers encounter in the literature that inform research on these communities?
- What do the multiple voices of scholars from across the globe say about Euro-Western research methodologies?
- How can we carry out research so that it is respectful and beneficial to the researched communities?

Most of the concerns and questions raised above are addressed in this book. It will demonstrate how scholars continue to critique Euro-Western research paradigms and advance ways of transforming them so that they are inclusive of the indigenous knowledge systems and life experiences of the historically colonized, disenfranchised, and dispossessed communities. A postcolonial indigenous research paradigm and its methods and methodologies are discussed.

TERMINOLOGY IN POSTCOLONIAL INDIGENOUS RESEARCH METHODOLOGIES

A variety of terms are used in this chapter and throughout the book. Although most of them are commonplace terms, it is important to spell out their precise meaning in this work.

Research: It is systematic, that is, it is the adoption of a strategy or a set of principles to study an issue of interest. The systematic strategy usually starts with the identification of an area of interest to study; a review of the literature to develop further understanding of the issue to be investigated; and choice of a research design or strategy that will inform the way the sampling of respondents is performed, the instruments for data collection, the analysis, interpretation, and reporting of the findings. You should in addition problematize research as a power struggle between researchers and the researched. Michel Foucault (1977), for example, observes that

what we know and how we know [are] grounded in shifting and diverse historical human practices, politics, and power. There are in the production of knowledge multiple centres of power in constant struggle; [through] conflict, compromise, and negotiation . . . whichever group is strongest establishes its own rules on what can be known and how it can be known. A non-power related truth game is not possible, thus humanity installs each of its violences in a system of rules and thus proceeds from domination to domination. (p. 151)

The research you do will have the power to label, name, condemn, describe, or prescribe solutions to challenges in former colonized, indigenous peoples and historically oppressed groups. You are encouraged to conduct research without perpetuating self-serving Western research paradigms that construct Western ways of knowing as superior to the Other's ways of knowing. The book draws your attention to the emphasis on the role of the researcher as a provocateur (Mertens, 2010a) and a transformative healer (Chilisa, 2009; Chilisa & Ntseane 2010; Dillard, 2008; Ramsey, 2006) guided by the four Rs: accountable responsibility, respect, reciprocity, and rights and regulations of the researched (Ellis & Earley, 2006; Louis, 2007; Weber-Pillwax, 2001; Wilson, 2008), as well as roles and responsibilities of researchers as articulated in ethics guidelines and protocols of the former colonized, indigenous peoples and the historically oppressed. The position taken in this book is that postcolonial indigenous research methodologies should stand on an equal footing with Western research paradigms and should be an essential and integral part of any research methodology course.

You are invited to problematize a “captive or colonized mind” on the entire systematic set of principles to study an issue.

The Captive Mind. Partha N. Mukherji (2004) challenges all researchers to debate whether the social science methodologies that originated in the West and are indigenous to the West are necessarily universal for the rest of the world. What is your reaction to the challenge? The Malaysian sociologist Syed Hussein Alatas (2004) developed the concept “the captive mind” to refer to an uncritical imitation of Western research paradigms within scientific intellectual activity. Others (Fanon, 1967; Ngugi wa Thiong’o, 1986a, 1986b) discuss a process they call colonization of the mind. This is a process that involves stripping the formerly colonized and historically marginalized groups of their ancestral culture and replacing it with Euro-Western culture. The process occurs through the education system, where learners are taught in languages of the colonizers to reject their heritage and embrace Euro-Western worldviews and lifestyles as the human norm. The rejection of the historically colonized and marginalized groups’ heritage and the adoption of Euro-Western norms occur throughout all the stages in the research process. For instance, the conceptual framework, development of the research questions, and methods of data collection in most studies emanate from the developed world literature, which is predominantly Euro-Western. In addition, the language in the construction of research instruments and the dissemination of research findings is in most cases that of the colonizers. You are invited to problematize research and doing research “as a significant site of the struggle between the interest and knowing of the West and the interest and knowing of the ‘Other’” (Smith, 1999, p. 2). What follows is a discussion of imperialism and colonialism with special attention to the power imbalance that exists between the Euro-Western research paradigm and non-Western societies that suffered European colonial rule, indigenous peoples, and historically marginalized communities.

Imperialism, Colonialism, and Othering Ideologies

One of the shortfalls of Euro-Western research paradigms is that they ignore the role of imperialism, colonization, and globalization in the construction of knowledge. An understanding of the values and assumptions about imperialism, colonization, and globalization that inform Euro-Western research paradigms will enable you to appreciate and understand how Euro-Western methodologies carry with them an imperial power and how they are colonizing. Let us begin with a description of imperialism and the values and assumptions that inform Euro-Western methodologies.

Imperialism. Imperialism, in the more recent sense in which the term is used, refers to the acquisition of an empire of overseas colonies and the Europeanization of the globe (Ashcroft, Griffiths, & Tiffin, 2000). The term is also used to describe the “practice, theory, and the attitudes of a dominating metropolitan centre ruling a distant territory” (Said, 1993, p. 8). The theory, practice, and attitudes of the metropolitan created an idea about the West and the Other that explains the dominance of Euro-Western research paradigms and the empire of deficit literature on the formerly colonized and historically oppressed. The term *Othering* was coined by Gayatri Spivak to denote a process through which Western knowledge creates differences between itself as the norm and other

knowledge systems as inferior (Ashcroft et al., 2000). Stuart Hall (1992) explains the West as a concept describing a set of ideas, historical events, and social relationships. The concept functions in ways that allow the characterization and classification of societies into binary opposites of colonizer/colonized or first world/third world. The concept also condenses complex descriptions of other societies into a sameness image judged against the West idea. Chapter 3 illustrates how the Othering and sameness ideologies work to marginalize and suppress knowledge systems and ways of knowing of the historically colonized and those disadvantaged on the basis of gender, ethnicity, and social class.

Colonization. Colonization, defined as the subjugation of one group by another (Young, 2001), was a brutal process through which two thirds of the world experienced invasion and loss of territory accompanied by the destruction of political, social, and economic systems, leading to external political control and economic dependence on the West: France, Britain, Germany, Spain, Italy, Russia, and the United States. It also involved loss of control and ownership of their knowledge systems, beliefs, and behaviors and subjection to overt racism, resulting in the captive or colonized mind. One can distinguish between different but intertwined types of colonialism—namely, political colonialism, which refers to occupation and external control of the colonies, and scientific colonialism, which refers to the imposition of the colonizers' ways of knowing—and the control of all knowledge produced in the colonies. In Africa, colonial occupation occurred in 1884 when Britain, Belgium, France, Germany, Italy, Portugal, and Spain met at the Berlin Conference and divided Africa among themselves. African states became colonies of European powers and assumed names related to the colonial power and its settlers, explorers, or missionaries. For example, present-day Zimbabwe was named Southern Rhodesia, and Zambia was named Northern Rhodesia after the explorer Cecil John Rhodes. European explorers, travelers, and hunters were notorious for claiming discovery of African lands, rivers, lakes, waterfalls, and many other of Africa's natural showcases and renaming them. This was a violent way of dismissing the indigenous people's knowledge as irrelevant and a way of disconnecting them from what they knew and how they knew it (Chilisa & Preece, 2005). Scientific colonialism speaks directly to the production of knowledge and ethics in social science research and has been described as the imposition of the positivist paradigm approach to research on the colonies and other historical oppressed groups. Under the guise of scientific colonialism, researchers travelled to distant colonized lands, where they turned the resident people into objects of research. The ideology of scientific colonization carried with it the belief that the researchers had unlimited rights of access to any data source and information belonging to the population and the right to export data from the colonies for purposes of processing into books and articles (Cram, 2004a, 2004b). With these unlimited powers, researchers went out to collect data and write about the one reality that they understood. In the disciplines of psychology, anthropology, and history, operating on the positivist assumption of generating and discovering laws and theories that are generalizable, researchers mapped theories, formulae, and practices that continue to dictate how former colonized societies can be studied and written about. Psychology, for instance, developed standard conceptions and formulations by which all people of the world are to be understood; today, researchers molded to accept oppressive perspectives as the norm find it difficult to operate differently (Ramsey, 2006).

Scientific colonization has implications for the decolonization process. Reading and conducting research responsibly should involve reflecting on the following questions:

1. Does the research approach have a clear stance against scientific colonization?
2. Is the research approach of travelers moving to distant lands to acquire data to process them into books and journal articles ethical?
3. Where is the center of knowledge and information about a people or community located?

Globalization. Globalization is an extension of colonization. Spivak (1988) analyzes the contemporary relationship between colonial societies and the former colonizers and notes that we are witnessing a distinct phase in the way the world is ordered. She notes that, in the current phase of globalization, a mere extension of colonization,

the contemporary international division of labor is a displacement of the field of nineteenth-century territorial imperialism. Put simply, a group of countries, generally first world, are in the position of investing capital; another group, generally third world, provide[s] the fields for investment both through the comprador indigenous capitalists and through their ill-protected and shifting labor force. (p. 287)

Current attempts by researchers to find the cure for HIV and AIDS are an example of how people in former colonized societies provide the fields as objects/subjects for research by multinational corporations. Recently, there has been conflict over a trial of the drug Tenofovir, which researchers allege may eventually serve as an effective chemical vaccine against the human immunodeficiency virus that causes AIDS. In Cambodia, efforts to test the drug among prostitutes were unsuccessful. The sex workers wanted more pay, more information, and a promise of health insurance for 40 years. Although the researchers agreed to provide more information for the sex workers, they said they could not promise long-term insurance; it was not something that is typically provided in studies and would be prohibitively expensive, they argued (Cha, 2006). The question one asks is what research benefits can accrue to poor countries, where the drug may not be affordable to the HIV and AIDS at-risk groups like sex workers? The conflict between the researchers and sex workers arose when the sex workers demanded the right to define the benefits they wanted as research subjects. The conflict between the researchers and the researched, and the determination of the researched to speak out about their rights, are indicative of local resistance against colonization and its new form, globalization.

Elsewhere, Bagele Chilisa and Julia Preece (2005) noted how the stealing of African indigenous knowledge of local resources such as plants and herbs by Western-trained researchers and Western companies is a contemporary instance of how African indigenous knowledge systems continue to be marginalized. The authors give an example of the San and their knowledge of the hoodia cactus plant, which grows in the Kalahari Desert. The original home of the San, it is a vast area of land that cuts across Botswana, Namibia, and South Africa. Through observation and experiments, the San discovered that the hoodia cactus has medicinal properties that stave off hunger. Members of generation

after generation of the San have thus chewed the plant on long hunting trips. According to Pusch Commey (2003), Phytopharm, a United Kingdom-based company working with the South African Council for Scientific and Industrial Research, isolated the active ingredients in the cactus that makes this possible. The company has renamed this property, long known by the San, P57, and it has been manufactured into a diet pill that fetches large amounts of money for pharmaceutical companies. The San had to fight to reclaim their intellectual property of the qualities of the hoodia cactus plant.

Postcolonial Indigenous Research

Postcolonial indigenous research methodologies must be informed by the resistance to Euro-Western thought and the further appropriation of their knowledge.

Postcolonial. The word *postcolonial* is highly contested and at the same time popular (Mutua & Swadener, 2004; Swadener & Mutua, 2008). The bone of contention is that some can read the post to mean that colonialism has ended, while others can interpret postcolonialism to include people with diverse and qualitatively different experiences with colonialism. For instance, the United States began as a British colony, but the white settlers ended up imposing colonization on Native Americans. The word *postcolonial* is used in the research context to denote the continuous struggle of non-Western societies that suffered European colonization, indigenous peoples, and historically marginalized groups to resist suppression of their ways of knowing and the globalization of knowledge, reaffirming that Western knowledge is the only legitimate knowledge. Part of the project in this book is to envisage a space where those who suffered European colonial rule and slavery, the disenfranchised and dispossessed, can reclaim their languages, cultures, and “see with their own eyes” the history of colonization, imperialism, and their new form, globalization, and, with that gaze, create new research methodologies that take into account the past and the present as a continuum of the future. This is the in-between space where Euro-Western research methodologies steeped in the culture, histories, philosophies, and the social condition of the Westerners can collaborate with the non-Western colonized’s lived experiences and indigenous knowledge to produce research indigenous to their communities and cultural, integrative research frameworks with balanced lending and borrowing from the West.

Throughout the book, I will use the term *colonized Other* to refer to those who suffered European colonization, the disenfranchised and dispossessed, often represented as the non-Western Other. These people live in what has been labelled the third world, developing countries, or underdeveloped countries. Included among the *colonized Other* are indigenous populations in countries such as Canada, the United States, New Zealand, and Australia. Ethno-specific groups who have lived in some Western countries, such as African Americans in the United States and Caribbean-born people in the United Kingdom, also fall under the category of Other. Immigrants, refugees fleeing war-torn countries, and the poor are also being colonized and marginalized by Eurocentric research paradigms and thus fall under the category of the Other referred to in this book. The term *colonized Other* emphasizes the fact that the communities described still suffer scientific colonization as well as colonization of the mind. Part of the project in this book is to show how the colonized Other resists scientific colonization and colonization of the