JHEA/RESA Vol. 19, No. 2, 2021, pp. 27-55

(ISSN 0851–7762)

Beyond Academic Imperialism in Comparative Studies of the Global South: Methodological Reflections

Madalitso Zililo Phiri*

Abstract

Contemporary debates on decolonisation have reluctantly forced social scientists to engage with neglected debates on race and epistemology. This article recasts these debates through methodological reflections that compare South African and Brazilian social policies by centring the interpellations of racial capitalism, poverty, inequality, and social exclusion. I conducted forty-five in-depth interviews with beneficiaries of social assistance programmes such as social grants and Bolsa Familia and with policymakers in South Africa and Brazil. Both countries offer compelling cases for comparison because they share important characteristics. How does the generation of knowledge in comparative public policy aid in advancing methodological perspectives that lead towards an imagination of a more democratic global social science? I offer a methodological reflexivity that challenges academic imperialism and underscores the importance of how local questions have global relevance in advancing an agenda for knowledge decolonisation. I achieve this by critiquing the positivist tradition in comparative sociology.

Résumé

Les débats contemporains sur la décolonisation ont poussé les chercheurs en sciences sociales à s'intéresser, à contrecoeur, aux débats négligés sur la race et l'épistémologie. Cet article reformule ces débats à travers des réflexions méthodologiques qui comparent les politiques sociales sud-africaines et brésiliennes en centrant les interpellations de capitalisme racial, de la pauvreté, de l'inégalités et de l'exclusion sociale. Nous avons mené quarante-cinq entretiens approfondis avec des bénéficiaires de programmes d'aide sociale tels que les allocations sociales et la Bolsa Familia, ainsi qu'avec des décideurs politiques en Afrique du Sud et au Brésil. Les deux pays offrent des cas de

* Post Doctoral Research Fellow, Johannesburg Institute for Advanced Study, University of Johannesburg, South Africa. Email: madalitsophiri1@gmail.com

comparaison car ils partagent des caractéristiques importantes. Comment la production de connaissances en matière de politiques publiques comparées contribue-t-elle à faire avancer les perspectives méthodologiques qui mènent à l'imagination d'une science sociale mondiale plus démocratique ? Pour faire avancer un programme de décolonisation des connaissances, nous proposons une réflexivité méthodologique qui remet en question l'impérialisme académique et souligne l'importance de la pertinence mondiale des questions locales. Nous y parvenons en procédant à l'analyse critique de la tradition positiviste de la sociologie comparative.

Introduction

The production of knowledge in the social sciences is a global enterprise shaped by asymmetrical power relations entrenched through academic imperialism which valorises knowledge from the metropole. The relationship between racism and epistemology has been more pronounced since the onset of colonial modernity and epistemic racism, achieved through a discourse of alterity and 'Othering' (Mafeje 1991, 1992; Said 1978, 1993, 1994; Hall 2019; Alatas 2000, 2003; Amin 2009 [1989]; Smith 2012 [1999]; Gordon 2019, 2014; Mamdani 2013, 2021). Global comparative public policy studies are indicted as entrenching academic imperialism by positioning the global South as a 'zone of data collection', not able to offer any methodological and theoretical extrapolations (Alatas 2000, 2003, 2006). My doctoral project compared South African and Brazilian social policies by locating them in the two countries' social architectures. I collected data from 45 in-depth interviews with beneficiaries of social assistance programmes (Social Grants and *Bolsa Familia*,) as well as with policymakers in South Africa and Brazil. However, this article posits: how does the generation of knowledge in comparative public policy studies aid in advancing scholarship that leads toward the imagination of a more democratic global social science? South Africa and Brazil offer compelling cases for comparison because they share important characteristics: histories of colonial domination, slavery, and anti-black racism, all of which have provided grounds for what today are highly unequal societies (Marx 1998; Horne 2007; Telles 2004; Phiri 2020a, 2020b, 2017).

Drawing on my interlocutors and longitudinal public datasets on income, wealth, and social inequality, the doctoral study concluded that the commodification of social provisioning in an era of a hierarchical racialised neoliberal social policymaking threatens the imagination of a new social contract (Phiri 2020a, 2017). Neither country is a prototypical example of twenty-first-century progressive social policies of the global South. While progressive in design, the two countries' social policies are

residual, failing to challenge the institutional legacies of anti-Black racism and Black genocide which are foundational to citizenship in both South Africa and Brazil (Magubane 1979; Phiri 2017, 2020a, 2020b; Nyoka 2016; Mamdani 2021). This article, however, problematises and critiques the colonially constructed paradigm that for knowledge to be considered 'true knowledge' it should be Western (Mignolo 2009, 2011). At various stages of my doctoral career, it was common for academic colleagues, both Western and African, in several conferences at which I was a presenter (in Africa and across the world) to ask: 'Why should an African, a Malawian for that matter, be fit to conduct a comparative study of South Africa and Brazil?' One would be excused for believing that such a question is neutral and therefore does not raise what are deemed dated debates on colonial legacies that have defined global geographical classifications and the hierarchisation of knowledge ecologies.

Global academia is presented as a neutral space that champions a democratic sharing of knowledge and ideas as separate from the racialised hierarchies it has perpetuated for centuries. It goes without saying that emerging scholars enmeshed in a Eurocentric canon of producing knowledge do not face similar levels of scrutiny. This point was subtly made clear in the 2006 Hollywood blockbuster, *The Last King of Scotland*, which documented the rise and fall of the Ugandan despot Idi Amin. The film portrays the fictional character of a young Scottish medical student, Nicholas Garrigan, who has dull prospects at home and decides to seek adventure abroad by working at a Ugandan missionary clinic. He stumbles on his newfound purpose by tossing a coin that falls on the map of Uganda, which becomes his preferred destination to explore a career in medicine. The young medical student's desires and ambitions are not subject to any scrutiny. Uganda becomes for him *terra nullius*, providing a sense of wonder, adventure, and sexual experimentations with a hyper-sexualised female Native. The relationship between race and epistemology is highlighted because Garrigan's ambitions are not questioned, affirming the privileged position that 'Whiteness' and 'White Supremacy' exerts in defining global expériences, spaces, tastes and inadvertently the knowledge production ecology.

That knowledge was colonised, hierarchical, Eurocentric and therefore racialised is not a new phenomenon. As Mamdani (1996:4) points out, Hegel's *Philosophy of History* mythologised 'Africa proper' as the land of childhood. However, Radical Black theorists never viewed the European canon as a theoretical and intellectual cul-de-sac; rather they agitated for emancipatory knowledge ecologies for erstwhile oppressed people of

African descent (Fanon 1963; Cesaire 1972; Nkrumah 1973; Diop 1981; Mudimbe 1988; Mafeje 1992; Hall 2019 [1992]; Nyoka 2019). In Fanon's words the process of political and epistemic decolonisation sets out to change the order of the world, a programme of complete disorder. It is a meeting of two forces, opposed to each other by their very nature, which in fact owe their originality to that sort of substantification which results from and is nourished by the situation in the colonies (1963:27-28). Contrast this with what the Eurocentric mind conceptualised: 'Africans were no ordinary children. They were destined to be so perpetually – in the words of Christopher Fyfe, Peter Pan children who can never grow up, a child race' (Mamdani 1996:4).

This article problematises the comparative method by reifying the work of global Southern theorists, using their observations to make sense of empirical comparative studies. In contemporary times the South African and global academy have become sites of renewed struggles toward knowledge decolonisation propelled by 'fallist' movements such as the #RhodesMustFall, #FeesMustFall, and the #BlackLivesMatter movement across the Atlantic. Such approaches have problematised the hegemonic Eurocentric traditions of syllabuses which are premised on sovereign epistemologies that are deeply ingrained in the university's pedagogical approaches. While this wave is noble and should be applauded, some scholarly responses border on the hagiographic and charlatan intellectualism. They do not tap into a rich African intellectual archive that has historically been positioned to withstand academic imperialism and the Eurocentric nature of the university.

This article brings to the fore the researcher's ability to navigate social artefacts such as language, gender, and geography as pivotal to advancing knowledge decolonisation. Both South Africa and Brazil continue to exist in the 'metaphysical empires' that have been cemented since the inception of colonial modernity. Simultaneously, the article challenges the assumption that local questions should be localised. Local questions invoke universal applications and vice versa. For decades, research about societies in the global South has been advanced by scholarship located in the global North (Alatas 2000, 2006, 2003). While this asymmetrical research relationship has yielded substantial theoretical approaches to understanding poverty, inequality, social change, and political developments, local lead researchers are often side-lined and marginalised, and not seen as knowledge producers. Through the lenses of thinking with theory and methods, the article contributes to critical debates on race and epistemology by centring the perspectives of the formerly colonised and oppressed peoples of the world (Smith 2012 [1999]; Sandoval 2000; Bonilla-Silva & Zuberi 2008; Chilisa 2012).

Academic Imperialism and Comparative Public Policy Studies: South Africa and Brazil through the Lenses of the Comparative Method

The epistemological foundations of comparative sociology encompass asymmetrical knowledge production relations between the global North and South. Between the 1960s and 1980s there emerged several approaches to comparative theorisations (Rokkan 1966; Verba 1967; Sartori 1970; Skocpol 1979; Skocpol & Somers 1980) which have advanced 'comparative studies and 'knowledge' about the evolution of Western state formation as well as the global South. Ragin (1981) argues that it is impossible to think without comparison. Although some perspectives suggest that virtually all social scientific methods are comparative in the broad sense, for Ragin, in sociology, the term comparative method usually refers to the comparison of whole societies. Comparative sociology cannot be abstracted from the colonial and imperial machinations that have perpetuated epistemic racism for decades. Most key theorists that have advanced 'Comparative Studies' have theorised about 'society' or 'societies' from privileged polarised positions where knowledge had been defined through the lenses of imperialism and White supremacy. Implicit in the ideational composition of most comparative studies is an 'academic imperialism' that is founded on the political, economic, social, and cultural imperialism forged since the inception of Euro/American colonial modernity. Alatas suggests the following:

> Today, academic imperialism is more indirect than direct…. In the postcolonial period what we have is academic neo-imperialism or academic neo-colonialism as the West's monopolistic control and influence over the nature and flows of social scientific knowledge remain intact even though political independence has been achieved (2003:601–602).

Throughout the twentieth century, academic imperialism was achieved through a narcissistic and divisive thirst for geo-political dominance – the agenda of an insecure United States empire, which birthed American Studies and Area Studies. Burden-Stelly (2018:78) notes: 'The American studies project was conceived to describe, construct – and later critique – a particular American culture and civilisation (i.e. national self-determination) vis-à-vis other "great" civilisations in order to provide a scholarly basis for American empire'. In the same breath, Area Studies overtly and covertly championed the gathering of 'knowledge' of erstwhile colonies in Africa, Asia, and Latin America. The United States was enmeshed in a rivalry with the Soviet Union, justifying the State

Department's funding of a global project of knowledge domination. Paul Zeleza critiques this approach, highlighting the polarising effects this had in the global knowledge ecology. He argues:

> ….The social science and humanities disciplines strutting into the American academy remained resolutely ethnocentric. They concocted from sanitised American and European experiences universal models and theories that blissfully ignored the reality and diversity of global histories and geographies, cultures and societies, polities, and economies. The area studies project enabled the disciplines both to retain their epistemic superiority and acquire new testing sites for the affirmation of their supposedly eternal theoretical probity (2019:8).

The West as a concept created an avatar of its civilisation, through classification, comparison, and criteria of evaluation, thereby consolidating ideas that cemented the perpetual asymmetrical location of knowledge from the global South knowledge as inferior. But what exactly is the West? Stuart Hall (2019) contested the idea of the West as located in a rigid trans-geographical location. Rather he suggested, 'the West' is a historical, not a geographical construct. Hall avers:

> [B]y "Western" we mean the type of society that is developed, industrialised, urbanised, capitalist, secular, and modern. Such societies arose at a particular historical period – roughly, during the sixteenth century, after the Middle Ages and the breakup of feudalism (2019:142).

The amalgamation of ideas, practices, symbol formation, values, and institutions since the inception of colonial modernity produced the West as a concept. Hall (2019) identifies four traits that solidified the West as a concept. First the West, 'allows us to characterise and classify societies into different categories – i.e., "Western",' "non-Western." It is a tool to think with. It sets a certain structure of thought and knowledge in motion' (Hall 2019:142). Second, 'it is an image, or set of images. It condenses a number of different characteristics into one picture' (Hall 2019:143). Third, it provides a standard or model of comparison. It allows us to compare to what extent different societies resemble, or differ from, one another. Non-Western societies can accordingly be said to be 'close to' or 'far away from' or 'catching up with' the West. It helps to explain difference (Hall 2019:143). Fourth, it provides criteria of evaluation against which other societies are ranked and around which powerful positive and negative feelings cluster (Hall 2019:143).

Academic imperialism is evident in public policy discourses which have canonised the policy experiences of Western industrial democracies, and in the quantification of policy contours through statistical modelling.

By suggesting this, I am not advocating against the usage of statistical modelling in the social sciences. I am arguing that the global South and North are not homogenous research entities. Rather, academics must consider the importance of racism and epistemology in public policy studies. In several explanatory studies of comparative public policy, the global South is deemed not to contain rigorous statistical, theoretical, and methodological contributions that warrant theorisation. Bonilla-Silva and Zuberi (2008) provide a comprehensive account of how statistical modelling was inextricably linked to the numerical analysis of human difference. They argue that 'eugenic ideas were at the heart of the development of statistical logic. Statistical logic, as well as the regression-type models that they employed, is the foundation on which modern statistical analysis is based' (Bonilla-Silva & Zuberi 2008:8).

Several comprehensive volumes on public policy and methodology published between 2000 and 2020 either erase the public policy experiences of the global South or engage in a colonially informed lexicography that perpetuates alterity (Fischer et al. 2007; Lunn 2013; Moran et al. 2018). The line of argument pursued in these handbooks is that policy decisions combine sophisticated technical knowledge with complex social and political realities that defining public policy itself has confronted various problems. The global South is condemned to an anachronistic period divorced from the 'canon of thinking' and 'belonging', and therefore excluded from the normative teleological goals of Western public policy.

Opposition to the project of colonial modernity has preoccupied African scholars and global critical theorists whose experiences have been profoundly scarred by colonial modes of being and consciousness (Said 1978, 1993, 1994; Mudimbe 1988, 1994; Hall 2019 [1992]; Chakrabarty 2000; Mamdani 2004, 2013, 2020; Mkandawire 2005; Gordon 2014, 2019). Since the inception of public policy, the discipline envisioned a multidisciplinary enterprise capable of guiding political decision processes of post-Second World War industrial societies (Fischer et. al 2007; Lodge 2007; Moran et al. 2018). This vision of public policy was to cut across various specialisations, including contributions from political science, sociology, anthropology, psychology, statistics, and mathematics, and even the physical and natural sciences in some cases (Lodge 2007). Most societies of the global South existed as colonial appendages; and could therefore not bring novel contributions to the evolution of the field. The asymmetrical power relations produced a policy discourse where Western democratic experiences matured and therefore warrant being studied, whereas the global South exists outside policy experiences. While some policy scholars

and practitioners in the West abandoned this narrow view of public policy, societies in the global South were deemed not to have not reached the teleological goal of comprehending trends worth studying. Even Esping-Andersen's 'Three Worlds of Welfare Capitalism' (1990) which cemented the conceptualisation of the Welfare Regime Approach (WRA) only focused on industrial democracies in the global North.

Other than the neglect of public policy conceptualizations in the global South, a major point of departure was the WRA's failure to account for the transformations that had taken place in South-east Asia. Holliday (2000) suggested the productivist approach to welfare, which he deemed a fourth dimension of welfare to be added to Esping-Andersen's WRA. Holliday (2000) argued that Esping-Andersen's arbitrary restriction ruled out the examination of capitalist states that do engage in social policy, while also subordinating it to other policy objectives. He concluded that there is no reason why states like South Korea, Taiwan and Singapore should be excluded, especially because the reason they are omitted in Esping-Andersen's WRA is their subordination to other policy objectives – which in this case can be used as a fourth criterion for identifying worlds within the universe of welfare capitalism (Holliday 2000:708). While the productivist approach offered a 'novel' understanding of the sociological theorisations of the South-east Asian welfare state, it reinforced the positions of epistemic posturing and exceptionalism; and was not a major departure from Esping-Andersen's (1990) WRA. Further, Mkandawire and Yi (2014) note that although this strand of explanation highlights the linkage between social policy and economic policy

> …it does not identify the diverse forms and nature of the subordination of social policy; whether it was solely productivist or if it also reduced poverty; whether it provided protection or was redistributive; during which phases of the process of industrialisation it was implemented; and which relative weights were attached to the objectives over the different phases of industrialisation" (Mkandawire & Yi 2014:3).

In the so-called global South, countries that are taken seriously are Latin American and Asian countries such as Brazil, Chile, Mexico, Argentina, China, and India. According to a Eurocentric approach to public policy these 'exceptional' countries in the global South, oscillate between normative democratic institutions as found in 'industrial democracies' and pathologies observed across 'developing societies'.

My doctoral study attempted to transcend academic imperialism by comparing two societies in the global South, carved out of imperial, colonial, and racist capitalisms. South Africa's public policies predate

the post-democratic settlement, rooted in the polarising redistributive mechanisms of British colonial institutions and apartheid's segregated social provisioning. Brazil's rediscovery of social policy has been presented as a model for the global South through policy transfer to effect social transformation. However, when abstracted from the pernicious histories of racist capitalisms and social stratification, these arguments are demystified (Phiri 2020a, 2017). The qualitative dimension of my doctoral study was divided into two sectors: beneficiaries of social assistance (amounting to thirty-eight interviewees) and seven policy makers; across race, class, gender, and geography of the interlocutors. In total, forty-five qualitative interviews were conducted in both South Africa and Brazil that focused on the lived experiences of poverty and inequality and the policy perspectives from social policy experts in both countries. The thirty-five in-depth interviews targeted beneficiaries of welfare programmes in both South Africa and Brazil. The seven key informant interviews were conducted with policymakers and academics with expert knowledge on the ideas and designs of South Africa and Brazil's social policy architectures.

Key informant interviews were administered to assess the technical and comprehensive articulations of policy contestations in both South Africa and Brazil. In South Africa, beneficiaries of social grants were interviewed in Mangalase, Chiawelo and Lawley in Soweto in Gauteng Province, and two villages in Ntshuxi and Bungeni in Limpopo Province between August and October 2015. Policy perspectives were provided by social policy experts and government officials from the Department of Social Development (DSD) and the Presidency in the City of Tshwane between September 2015 and October 2015. One key informant interview from South Africa was conducted in February 2016 after the researcher had returned from Brazil.

In Brazil, beneficiaries of *Bolsa Familia* and other social assistance programmes were interviewed in urban peripheries: Casa Forte in Recife, state of Pernambuco, and Osasco and Vila Nova de Juguaro in the city and state of São Paulo between November and December 2015. Policy perspectives were provided by social policy experts and government officials from Brazil's Ministry of Social Development (MSD) in Brasilia and São Paulo in the same period. Table 1 illustrates the contours of composition of South Africa's and Brazil's social policy architectures as well as the social and political artefacts that have shaped public policy approaches in both countries.

Table 1: Institutional Legacies and Politics in South Africa and Brazil's Social Policy Architectures

Case	Historical Institutional Legacies and Demographics	Typology of Social Policy Architecture	Political System	Coverage of Social Assistance and % of Country's GDP
South Africa	Settler colonialism (Dutch, British colonial and imperial institutions)	Liberal to conservative	Constitutional democracy	Social grants (child support grant, old age pension, disability grant)
	Slavery, colonialism, indentured labour, apartheid 1500 to 1994	Quasi-universal	Quasi federal state	
	Multi-racial/ethnic, multilingual, Black African (80%), White European (8%), Coloured (9%), Indian/Asian (3%)	Targeted programmes with no conditions	Dominant one party since democratic transition in 1994	20 million recipients
	Racial capitalism discourse that cemented fragmented nation(s)	Social wage (no-fee paying school, expanded public works, public housing for the poor, healthcare, school feeding schemes)	ANC Electoral dominance between 2000 and 2016	3.5% of South Africa's US$343 billion GDP
Brazil	Settler colony (mainly Portuguese albeit other European influences)	Conservative	Constitutional democracy	*Bolsa Familia*, City Income, National Minimum Wage
	Slavery, colonialism, coerced labour, patrimonialism until 1888	Universal access	Decentralised federative republic	20 million recipients
	Multi-ethnic White European (48%), Pardo (43%), Black (8%), Asian (1%), Indigenous (0.4%), mono-lingual	Means-tested targeted programmes with conditions	Fragmented coalition politics since democratic transition in 1988	0.5% of Brazil's US$2 trillion GDP
	Racial democracy discourse that cemented a one-nation narrative.	Social wage (Quasi-universal access to healthcare, limited public housing, no-fee paying school, school feeding schemes)	Worker's Party coalition governance between 2003 and 2016	

Source: Author, Central Intelligence Agency (CIA) World Factbook.

Several studies have explained the nature of durable poverty and inequality in South Africa and Brazil (Seidman 2010; Huchzermeyer 2004, 2002; Barrientos 2013; Van der Westhuizen 2013, 2012; Leubolt 2015, 2014, 2013). Fewer studies, however, have pivoted race and racial formations in the two countries' social policy architectures. In both countries, social policy architectures oscillate between liberal and conservative regimes. There is a dearth of comparative public policy in the global South for the purpose of theory-building and the interrogation of thorough sociological explanations of the persistence of poverty, inequality, and social exclusion. If the methodological developments are present, they lack the methodological groundings for further theorisations. As early as the 1970s, Porter suggested that 'despite a strong emphasis on the comparative tradition, a rigorous comparative methodology had not emerged. The reason for this lack had to do with great difficulties that a rigorous comparative methodology would impose' (1970:144). By centring my research reflexivity on the thirty-eight beneficiaries of social assistance programmes, I hope to contribute to methodological reflections that fortify comparative public policy studies from the global South for global relevance.

Comparative Reflexivity in Conducting Research in South Africa and Brazil

South Africa

The in-depth interviews were conducted over a three-month period between July and September 2015 in the South African context. The participants in the South African cohort were below an income threshold which the state categorises as poor. The research had to overcome the discourse of studying poverty that is ubiquitous in international humanitarian discourse, in which poverty is a 'social zoo'. In these approaches, interlocutors are constantly probed to speak about the experiential perspectives of marginalisation and exclusion in a democratic polity such as South Africa. While these strategies have yielded substantial data to inform policy decisions at national and international levels, the research process itself can be dehumanising to respondents. The poor areas of the township are associated with inertia, pathologies and impossibilities that characterise the post-apartheid democratic settlement. At the point of interaction with the researcher, the interviewees did not describe themselves as poor. This does not mean, however, that some areas in the townships are not poor. However, the use of confessional technologies that trap the poor to plead poverty strips people of their agency and perpetuates the discourse of development as a 'White Man's burden'. Nguyen's argument to understand Human Immunodeficiency

Virus Infection and Acquired Immunodeficiency Syndrome (HIV/Aids) messages in the developing world provides a crucial intervention. She avers:

> The increasing scope of humanitarian intervention in today's world has drawn attention to how the humanitarian industry constructs a logic of intervention that displaces local politics and contributes to the fashioning of new identities, a process that has been described as 'mobile sovereignty'. The humanitarian 'apparatus', blending military and biomedical intervention, is a specialised and highly structured crystallisation of broader, more diffuse transnational processes wherein a diversity of groups, often referred to as nongovernmental organisations (NGOs), involved in a plethora of activities ranging from advocacy to service delivery, coalesce across different settings around specific issues. Humanitarian issues are most sharply expressed as health issues – threats to the lives and well-being of populations, as in the case of famines, war, and epidemics, are those that call forth the deployment of humanitarian apparatuses and the need for timely intervention (2005:125–126).

In all the interviews, the researcher was explicit that the contents of the in-depth interviews would not immediately lead to a radical shift in the perceived policies that keep marginalised citizens in conditions of indigence. Poor and marginalised citizens live with a sense of expectation and optimism that, somehow, their situations will change. In this instance, the in-depth interview guide prescribed a neutrality for the interviewer. Empathy to victims of structural poverty has in recent times been highlighted as crucial to informing a novel discourse on understanding power asymmetries that are embedded in research practices. The World Bank series titled *Voices of the Poor* (2000), at the turn of the century, incorporated primary research using Participatory Poverty Assessments (PAR) aimed at shifting polarising discourses that had defined poverty research for decades. While this approach was noble, as it incorporated the interactions of the poor, and multi-level analyses of how the poor interact with institutions of power, the present study, from the onset, aimed to balance the ethical bankruptcy of confessional technologies with the realities of how the poor see their lives being lived in a politically dynamic context.

The aim of the in-depth interview was to theorise with the beneficiaries of social grants as interlocutors. The questions were designed thematically to ensure that social assistance beneficiaries could relate their lived experiences to a politically dynamic research constituency. This was evident in South Africa's urban and rural areas. The researcher had initially planned one-on-one interviews that would be conducted with willing participants; yet the fieldwork experience, in some instances, was contrary. In South Africa, some of my interlocutors decided to invite their friends to listen to their

perspectives of living in a society that administers social assistance to them. This meant the in-depth interview could be used in multiple ways to gain insights into the normative understanding of complex emergencies in the researched area.

For example, one beneficiary who the researcher interviewed in Limpopo had been previously married to a man who was then deceased but had practised polygamy. The first wife agreed to be interviewed, yet she also insisted that the second wife who had been previously married to the deceased be part of the interview. After the interview was concluded, my interlocutors insisted that the script should be recorded and transcribed as one voice, as the views expressed by both reflected what they deemed to be important in relation to the social assistance received. It is crucial to see the effectiveness of using the instrument as only one method of obtaining data. Several scholars caution against the use of Focus Groups, 'to the exclusion of other methods, citing the potential for the silencing of voices, especially when group members have ongoing social relations. Because of small-group dynamics, minority opinions can be silenced, or group members with less power may be less willing to present their views' (Mitchell 1999).

The design of the in-depth interview catered for individually focused interviews, yet the experiences in the field deviated from the original design. The same trend was noted in Chiawelo, where residents decided to listen-in on the interviews. The researcher was confronted with instances in both Chiawelo and Ntshuxi where interviewees living in a particular household decided to be interviewed all at once. There are key differences in the group and individual emphasis of the nature of these interviews. Short 'has suggested that, with focus groups, the unit of analysis is the group not the individual. Participants respond directly to a moderator's questions and to comments made by other members of the group' (2006:107). Yet the researcher did not depart from the original intent of the research design which was to administer in-depth interviews with selected interlocutors by maintaining their individuality. There was a deviation in Chiawelo, whereby some of the beneficiaries decided to talk about private expenditure patterns of social assistance benefits in the lives of their friends/neighbours. At times, other beneficiaries told their friends to include information that they thought was being omitted by them. This, however, was not a form of interference.

The silence that was observed in participants even when gently probed to answer the questions can be explained on multiple levels. Firstly, the in-depth interviews were conducted in areas where the researcher would establish relations with local key informants and leading administrative figures such as chiefs. Gaining this trust with local administrators did not

mean respondents would be amenable to the contents of the questions. Some respondents felt that they could not discuss these issues as they suspected that the government was gathering information so that social assistance could be rescinded. Secondly, the silence also explains some of the hidden power relations in the history of research, related to South Africa's social milieu such as history, language, and gender dimensions. How can a non-South African understand the lived experiences of poverty, marginalisation, and social exclusion? Simultaneously, how can a male researcher ask questions about the experiences of poverty and inequality as they relate to race, class and gender? A comprehension of the bifurcated knowledge production of colonial modernity however, points to a different theorisation of gender stratification in the global value chain. Oyewùmí (2002) suggests that

> a hallmark of the modern era is the expansion of Europe and the establishment of Euro/American cultural hegemony throughout the world. Nowhere is this more profound than in the production of knowledge about human behaviour, history, societies, and cultures. One effect of this *Eurocentrism* is the racialization of knowledge: Europe is represented as the source of knowledge and Europeans as knowers. Thus, male gender privilege as an essential part of European ethos is enshrined in the culture of modernity (2002:1).

South Africa is enmeshed in a complex web of social and power relations shaped by a history of imperial domination, racial capitalism, gender inequalities and the production of racialised knowledge. These complexities cannot be overcome by administering an in-depth interview guide and simply stating that the foundational premises of all the bourgeois social sciences are Eurocentric. Insofar as these categories exist, for outsiders the task of doing research in the South African context is fraught with managing these complex social relations. The answers that were given by respondents are relevant to explaining what they perceived to be important. The researcher is not in a position to manipulate the discussions of the respondents so that they are conformed to the findings of the research. The researcher is always in constant dialogue so that the imperial practices may not be replicated. Smith cautions that 'research through "imperial eyes" describes an approach which assumes that Western ideas about the most fundamental things are the only ideas possible to hold, certainly the only rational ideas, and the only ideas which can make sense of the world, of reality, of social life and of human beings' (2012:58). In the same breath, the researcher's physical endowments come with their own limitations and baggage, whether it is being male (gender), educated (class) and Malawian (nationality). The most important attribute of any research, however, is that the empirical data should either validate or subvert a theory.

Brazil

The interviews in Brazil were administered over a three-month period between October and December 2015. The researcher was aware of the power dynamics that have shaped practices of research on the underprivileged in the Brazilian context. A heightened sensitivity to the depiction and framing of poverty as something that is associated with the Brazilian *favelas* needed to be demystified. In the initial site of research, Recife's Casa Forte, the power and social relations were evident from the onset. The researcher was introduced to a community organiser and a representative of the *Partido dos Trabalhadores* (PT) – (Worker's Party), who facilitated a meeting with interviewees in Casa Forte. All the interviews in Casa Forte, except for one, were conducted inside the homes of beneficiaries of social assistance. Contrary to the framing of Brazil's race relations through the lenses of a 'racial democracy' (which has been challenged in recent times in Brazil's complicated socio-historical context) all the respondents mentioned their delineated racialised categories. The in-depth interview stressed the importance of identifying the categories of location, age, race and gender.

The ten interviewees in Casa Forte initially showed reluctance to categorise themselves in the vast classifications in which Brazil defines race. The in-depth interview questionnaire did not make a distinction between the conceptualisation of race and racialisation in Brazil's social context. For example, one respondent had to rethink her racial identification and categorisation more than twice. The category 'race' does not warrant a straightforward answer in the Brazilian context. For most of the respondents, racial categorisations speak directly to phenotype, how Brazil have understood processes of racialised classes. Some scholars reified the historical importance of *branciamento* (whitening), relating it to nation-building (Hasenbalg & Huntington 1982; Andrews 1996; Telles 2004), yet in contemporary times the quotidian experiences of Black genocide, negation and necropolitics have been highlighted by critical Black scholars (Alves 2018, 2014a, 2014b; Alves & Vargas 2020). Traditionally this contrasts with histories of legislated racialised discrimination that are more explicit in the processes that cemented racialised classes in South Africa and the United States for example. While the researcher was acquainted with the Brazilian history of racial democracy prior to the beginning of the project, the instrument was fraught with limitations in identifying racial classifications that have been produced by this colonial architecture that are uniquely Brazilian.

In the same breath that these racial categorisations could not be clearly identified, the instrument also demonstrated a level of dynamism. Given the fact that race, class and gender were a crucial component to framing the entry point of the questions, respondents were afforded the opportunity to answer questions through the critical lens of a discourse that they are not used to in Brazilian society. While the comparative instrument may not meet all the equivalent racial categories on both sides, there are commonalities of shared histories of anti-black racism, Black and Native genocide, exclusion, and marginalisation that can be captured in the narration. Shrank suggests that 'while the case study is by no means the appropriate research design for each social scientific problem and is indeed ill suited to traditional, probabilistic causal analysis, it is anything but useless' (Shrank 2006:176). A populated in-depth interview guide proved effective in bringing out the complicated histories of race, slavery and social marginalisation that are sometimes less salient in Brazilian society and scholarship in general. Discussing race, class and gender and social exclusion may not be the point of entry when Brazilians engage in a social discourse. In contemporary times, theorists rooted in the Black Radical tradition have continued to challenge the overt erasures and silences of race and methodologies in Brazilian studies (Alves 2018, 2014a, 2014b; Alves & Vargas 2020).

While race remained a point of departure in the Brazilian context, the household as a social artefact was also an important category. There are undisrupted kinship ties that cannot be easily captured in the in-depth interview. For example, one respondent in Casa Forte mentioned that the categories 'household' and 'eating from one pot' were not something that they could identify with in Brazil. Firstly, a household in the Brazilian *favela* goes beyond the expanded definitions of a nuclear family. Some respondents indicated that they were more accustomed to solidarity practices that are beyond the definition of income being shared in one household. The household consists of kinship networks that are outside the confines of intimate spaces into which the researcher was welcomed. In the Brazilian context it includes *vizihno* (neighbours), who become central to the decisions that are made in this specific household. Secondly, the notion of 'eating from one pot' denotes indigence that is unfathomable in the Brazilian context. This may even be culturally offensive for some respondents, as agency constitutes an important dimension to overcome indigence even under hegemonic conditions of capitalist oppression. These nuances cannot solely be captured in an in-depth interview guide. This does not mean that questions need to be tweaked to get amenable responses; however, they should enable the narration of the data in such

a way that allows that history and context are observed to make sense of complex social realities.

The Brazilian context generated lengthy responses compared to the South African interviews. The scheduled participants of *Bolsa Familia* recipients in Salvador de Bahia refused to be interviewed, as they feared that their benefits would be rescinded. This is a form of silencing that derives from the identification of the social policy tools with the political project rather than with citizenship demands. The administration of the in-depth interview was further complicated by the researcher's positionality in the discourse of framing poverty. For example, most respondents in Casa Forte questioned why an African was asking questions about poverty and inequality in Brazil. The interlocutors were not questioning the integrity of the interview process, or the in-depth interview guides themselves, rather the sensibilities of the principal investigator's position in the hierarchisation of the nation-states themselves. Unfortunately, the in-depth interview guide did not anticipate these levels of theorisations. There are problematic motifs informed by colonial representations, lexicography and Brazil's place globally. A view of poverty as pervasive in Africa is framed by a polarising narrative that has been cemented as part of the Manichean processes of knowledge-gathering and processing.

Interviews were conducted in Brazil's south-eastern city of São Paolo and Osasco between November and December 2015. The administration of the in-depth interview was firstly conducted at a place where *Bolsa Familia* recipients were being trained to access benefits. The researcher had been introduced to municipal workers responsible for ensuring that these social assistance benefits are accessed by citizens. *Bolsa Familia* recipients preferred to speak through a local interlocutor who could explain to them the colloquial equivalents of concepts that had been crafted as part of the interview. The biggest challenge encountered was when respondents were asked about social assistance, social rights and democracy in Brazil. Brazil is not like South Africa, where the end of apartheid signified a radical shift in its social contract. Beneficiaries preferred to respond to the question, 'When did you start accessing the benefits of *Bolsa Familia*?' than when the researcher enquired more about democracy. The researcher also avoided using the 1988 Brazilian transition to democracy as a crucial date. The in-depth questionnaire had to accommodate this element, as the conceptualisation of democracy and social citizenship in Brazil is not directly correlated to a demise of a colonial order. The realisation of social assistance in Brazil is equated to the triumph of the PT in 2002; and this is what most beneficiaries could remember.

The proposition that data needed to be manipulated to find exact equivalents with South Africa does not hold in principle. Neither is the Brazilian context being interpreted through the lenses of South African experimentation with the in-depth questionnaire. Brazil is a uniquely different society, but not exceptional, which warranted that the in-depth questionnaire should make sense of its social context. The threshold that was used to assess expenditure on consumer goods and service affordability is not the same across all Brazilian cities. This is much more acute in the comparative responses provided by residents in Casa Forte and São Paulo. São Paulo and Osasco are urban metropolises, where poor inhabitants are constrained by the expensive costs of transportation, food, clothing, electricity, and the on-going diabolical and pernicious effects of gentrification. The same is not true of Casa Forte, where poor inhabitants are shielded from the relatively low-cost marginal living given Recife's position as a smaller urban metropolis. The in-depth interview guide had to adjust cost of living given these differentiations. The instrument itself did not change, rather it had to consider geographical and cultural specificities in this vast territory.

As was previously noted in the South African context, gender barriers proved to be a limitation to interviewing respondents. On one hand, the researcher benefited from the narrative of an African interlocutor conducting research in Brazil. There was a sense of curiosity and anticipation that respondents demonstrated, with the study offering an alternative entry point to understanding social assistance. However, given the fact that all the interlocutors that I interviewed were women, the asymmetrical power relations between male and female were difficult with the result that cultural depth and nuances may not be incorporated in the greater scope of the research.

Immersion, Geography and Language in South Africa and Brazil

This research from the onset was confronted with issues of geography, language and the researcher's position in the division of labour in the global knowledge ecology. Sociology itself as a discipline has largely been defined by the Northern metropole, where conceptual and methodological tools have been advanced, even to make sense of comparative studies in the global South (Alatas 2003, 2006; Nyoka 2013, 2019; Adésínà 2006, 2008). African researchers and doctoral candidates, to be more specific, continue to exhibit strong tendencies of what Hountodji (1990) called 'theoretical extroversion', the feverish importation of paradigms, problematics and perspectives, and the search for legitimation and respectability from the intellectual establishments of the North. If the division of labour has for

many centuries labelled the global South as a 'zone of data collection' and the North as a 'zone of knowing' (Said 1993, 1994; Zeleza 2019, 2002; Akpan 2011), then this asymmetrical power relationship is informed by the imperial and colonial imagination of geography and knowledge (Said 1978, 1993, 1994; Mamdani 2021, 2013). Said argued 'that just as none of us is outside or beyond geography, none of us is completely free from the struggle over geography. That struggle is complex and interesting because it is not only about soldiers and cannons but also about ideas, about forms, about images and imaginings' (1993:7). The real problem is Eurocentric ideas that birthed the concepts of Whites as 'sovereign' and the 'Other' as 'non-sovereigns' which have perpetuated a dualism of experiences and methodologies thereby inferiorising knowledge generated from the global South (Said 1993, 1994; Alatas 2000, 2006; Zeleza 2019, 2002; Akpan 2011). Making sense of these shifting social realities in the global South requires researchers to navigate the 'metaphysical empires' bequeathed to both South Africa and Brazil, where worlds that are linguistically not converged are yet enmeshed within histories of colonial domination and racialisation.

Comparative studies – at least those that pertain to 'whole societies' as defined before – have been advanced by the West's monopolistic control and domination of norms and values of engagement and interactions particularly within the realms of the nation-state which under Westphalia norms promotes tolerance, neutrality and equality. Yet as Mamdani has shown us, 'the birth of the modern state amid ethnic cleansing and overseas domination teaches us a difficult lesson about what political modernity is: less an engine of tolerance than of conquest' (2021: 2). In the same breath, the British Marxist scholar Benedict Anderson (1983) suggested that contemporary nation-statehoods are 'imagined communities' whereby nationality, or as one might prefer to put it nation-ness, and nationalism are cultural artefacts of a particular kind which need to be understood through the lenses of their historical evolution. Research experience and hierarchy have tended to follow similar patterns. Historically, Euro/American modernity positioned itself at the centre of global history and as a totalising human project through colonial genocides and the *mission civilisatrice*. Contemporary sociology and social sciences have mimicked this through a discourse that further entrenches the 'North'/'South' divide.

Through the centring of tastes, classifications, judgements and social Darwinism, the West cemented ideologies of racism and epistemology. The West became a self-referential civilisation where 'knowledge' and 'knowing' were equated to the teleological goal of a homogenous modernity which

has led to bifurcated forms of producing knowledge, a reality still felt in contemporary social sciences (Said 1978, 1993, 1994; Mamdani 2021, 2013; Zeleza 2002, 2019; Alatas 2003, 2006). A contemporary challenge to these knowledge production asymmetries is to champion 'inter-disciplinarity'. However, for the African context, Nyoka's (2019) thorough examination of Mafeje's works jettisons narrow theorisations of overcoming Eurocentrism across the social sciences by invoking Mafeje's conceptualisation of 'non-disciplinarity'. Nyoka observes the following:

> …. One wonders, however, whether there have not been any rigorous studies conducted and written from interdisciplinary perspectives. Perhaps a more valid reason to transcend inter/disciplinarity is ideological rather than methodological. The reason would be to transcend the social sciences because of Eurocentrism and imperialism, rather than intractable methodological demands. At any rate, Mafeje's proposed methodological approach is 'the discursive method' (Mafeje 1991, 1996, 2001). What he wants to do is to learn from African societies themselves, rather than approaching fieldwork with a predetermined theory or epistemology (Mafeje 1991).

The entry point in engaging with the terms and conditions of the Western canon of knowledge production is that researchers must emulate its ways and seek to preserve the status quo. This is not to say that scientific practices of producing knowledge should not be followed. Rather, as Said (1993:48) has argued, for the contemporary social scientist centuries later, the coincidence or similarity between one vision of a world system and the other, between geography and literary history, seems interesting but problematic. The contemporary global setting of overlapping territories and intertwined histories was already prefigured and inscribed in the coincidences and convergences among geography, culture, and history that were so important to the pioneers of comparative literature (in this case comparative studies) (Said 1993, 1994). The task that Said set for the next generation of social scientists was to make sense of the 'social question' from the position of the subaltern, given the historical precedent that the subaltern was never allowed to be included in the global canon of 'knowing'.

There is no reason why knowledge ecologies from the global South should not be prioritised, if boundaries and binaries produced by colonial modernity continue to conceal patterns of knowledge domination and exclusion. Zeleza's (2002) strident rebuke suggested that if the binary of producing knowledge continues to exist in the Western canon, then the international intellectual division of labour will continue to be reinforced. In this division of labour, African universities and social scientists import appropriate packages of 'universal' theory and, at best, export empirical data

to researchers conducted in the universities of the North. Contemporary approaches to knowledge production entrench Nativism, where the Native only exists to explain localised realities like magical realism, rituals, and witchcraft. For the scholar who is geographically located in the global South, research realities cannot transcend their geography. In the case of this research, the Malawian 'Native' is condemned to a 'zone of erasure', as his transnational research encounters, upbringing and dexterity across Malawi, Mozambique and South Africa, seeking to understand Africa's position, are deemed unsatisfactory to provide a worthy explanation in global dynamics.

Sociology as a discipline neither transcends this 'Nativist' bias nor provides an epistemological break, as its foundational conceptualisations were to understand the growing concerns of a metropolitan Europe (Alatas 2003, 2006). On an anecdotal level 'Africanists' are engaged in hagiographical presentations of the continent and at times the entire global South, explaining its historical, social, and political evolutions. While such scholarship may have yielded some methodological and theoretical theorisations, it is trapped in its own time where local interlocutors are often missing or, in other disciplines like political science, reinforced through a contextually distant statistical modelling. Recent attempts to challenge the epistemological inequalities and racism of knowledge production by Connell (2007) and Comaroff and Comaroff (2012) in sociology and anthropology in general further suffer from an ontological dislocation. Both texts are informed by a lengthy repository of references of pioneering work by other scholars in the global South and thus seek to appropriate it. It is as if for 'knowledge in the global South' to be 'true knowledge' it must be appropriated first by the Western-centric or Africanist approaches, and then speak on behalf of the subaltern.

Cognisant of these limitations, the researcher approached these issues as an 'outsider and insider'. The biases that are entrenched in the world of research are to a large extent informed by the bifurcated construction of knowledge and geography predicated on Euro/American modernity. As Said (1994) has observed, all of us live in a society and are members of a nationality with its own language, tradition, and historical situation. As Said (1994) also noted, the question posed from the onset, while conceptualising the research instruments, was: to what extent are researchers and intellectuals' servants of these actualities and to what extent enemies? The researcher recognised that geographical and knowledge limitations existed from the onset of the research. The researcher relied on an approach of 'being an insider and outsider' simultaneously for the interviewed cohort to reflect on their experiences in their context.

In the South African context, the researcher entered the research field, aiming to transcend the linguistic isolations that exist. The researcher was an outsider by a *de facto* category of being a 'Black African'. Here the researcher was immersed in the specific communities for research in solidarity with the weak and the oppressed. At the very same time in both South Africa and Brazil, the researched themselves have been weakened by the vagaries of marketisation of public policies and distorted histories which led to perceptions that the in-depth interview guides were intrusive, leading to the researcher's label as that of a 'government spy'. In light of these realities, the positions of insider and outsider (as a subaltern) were crucial in achieving the stated goals spelled out in the research instruments. The researcher's immersion confirmed what had been suggested by Said (1994) that the real or true intellectual is always an outsider, living in self-imposed exile, and on the margins of society. He or she speaks to, as well as for, a public, necessarily in public, and is properly on the side of the dispossessed, the unrepresented and the forgotten.

The immersion of being an 'outsider and insider' attempts to transcend what Zeleza (2002) calls a 'culture of imported scientific consumerism'. Zeleza (2002:9–10) argues that African social scientists have been caught in the bind of addressing African realities in borrowed languages and paradigms, conversing with each other through publications and media controlled by foreign academic communities, and producing prescriptive knowledge for what Mkandawire (2005) calls the unfinished historical and humanistic tasks of African nationalism: decolonisation, development, democracy, and nation-building. At the same time, the interactions with the research cohort attempt to forge a 'new universalism', by raising local questions that are globally relevant, as Said (1994) has suggested.

The asymmetrical power relations in the global knowledge ecology have made it possible that 'Whiteness' and research predicated on 'White supremacy' can easily access the subaltern so that the Western canon itself becomes the mouthpiece of struggle, alienation and social stratification. While such studies have yielded some methodological and theoretical perspectives, a universalism that advances a discourse framing the global South as a 'zone of pathology' is sustained. Akpan (2011) suggested that this approach can be termed a 'conspiracy of empathy' where local knowledge is deemed a target of 'caring' thought and a subject of quiet disdain. Local knowledge is typically described in terms that acknowledge the 'worth of indigenous and local communities', and in terms that recognise it as the 'information base of society'. In the South African context, the researcher's bargaining point of entry made it difficult as he was introduced as a 'doctoral

student from Malawi', studying social assistance in the various districts where research was carried out. In the Brazilian context, the researcher was introduced as a 'South African' with an interest in comparative perspectives of social assistance in South Africa and Brazil. Both places still reinforced the power asymmetries that tie themselves to the Western canon that the 'African' is globally positioned not to 'know' or explain social phenomena. Alatas (2003) identifies the global division of labour by highlighting 'the division between other country studies and own country studies'.

In South Africa, some of my interlocutors asked: 'how it was possible that a "Malawian doctoral student" could study South Africa's social phenomena as Malawi itself was associated with pathology'. In similar vein, some respondents in Brazil raised questions as to how an 'African researcher' seeks to understand the lived experiences of social assistance, as opposed to being in 'Africa' where there is already so much pathology. These research idiosyncrasies cannot be divorced from the design of studies that are standard practices in Western universities, civil society, and international organisations, enabled by the 'empowering the poor' discourse. While the World Bank adopted PAR as a framework for participatory action research in order to transcend knowledge hierarchisation , a poverty of ideas is ubiquitous in the world of policy and academe, thereby reinforcing a social imagination that reflects the triumph of a Euro/American colonial discourse that does not seek to see the 'local' as part of a 'global discourse'. Akpan suggests the following:

> the discourse of empowerment is not necessarily the same thing as bringing down the artificial walls that separate the 'local' from the 'global'; rather it seems in practice to be more about demanding of the poor to retain the 'local' if necessary, but to assimilate the 'global' by all means. In the global knowledge power play, therefore, the relationship between 'global' and 'local' is not unlike that of master and servant (2011:118).

In my research 'local' people were positioned as interlocutors of their own narratives to give back power to the researched and not reinforce the asymmetrical relationship of producing knowledge. While that is the case, the research also recognises that the biological category of being a 'man' may have interfered with answers that might have given adequate reflections of the cohort of women that were interviewed. In the South African context, this was made difficult by translators who may not adequately have explained social concepts in the vernacular, and social relations where the male/female category is clearly demarcated. In Sao Paulo, the local informants were Brazilians in the category of 'brancos', and the interviewed subaltern 'parda', 'morena' and 'negra' were not able to adequately expand on their social experiences.

The research aimed at finding common themes that arrived at a sociology of the 'normal' and not 'pathology'. Akpan (2010) suggests that there cannot be a permanent epistemic thrill in sociology when there is a ubiquitous conceptualisation of social dysfunction, discord, pathologies, and pessimism. This research attempted to transcend the struggles of the subaltern by framing its methodological orientation in the world of the living with 'sociations that are defined by cohesion, cooperation, actualisation, fulfilment, progress and hope' (Akpan 2010). This can only be achieved when local interlocutors are central to the processes of narrating their lived experiences to challenge existing epistemologies.

Conclusion

This article aimed to recast age-old debates that have defined the relationship between race and epistemology. Social scientific research is imbued with in-built asymmetrical knowledge that influences 'what' or 'who' is the progenitor of 'a knowledge'. Public policy research has been defined by epistemic racism and power asymmetries as the global South is relegated to the 'zone of collecting data' and therefore incapable of generating theoretical excavations. The article problematised the positivist methodological approaches by delineating gender, language and geography as key artefacts that need to be navigated to bring about a more democratic social science to make sense of the conditions that lead to further stratification in both South Africa and Brazil. While studies in comparative public policy have yielded substantial methodological and theoretical theorisations, local interlocutors in the process are at times absent. This practice is informed by a discourse of Euro/America colonial modernity and disciplines that have been at the centre of defining knowledge, thereby side-lining the quest for a more democratic social science. The position in this article recasts the importance of thinking with global South critical theorists to aid in dismantling problematic relations and asymmetrical power relations in research, where the global South exists as a 'zone of data collection' and the global North as a 'zone of theory'.

Acknowledgments

The financial assistance of the National Institute for the Humanities and Social Sciences, in collaboration with the Council for the Development of Social Science Research in Africa towards this research is hereby acknowledged.

References

Adésínà, J.O., 2006, 'Sociology, endogeneity and the challenge of transformation', *African Sociological Review,* Vol. 10, No. 2, pp. 133–150.

Adésínà, J.O., 2008, 'Archie Mafeje and the pursuit of endogeneity: against alterity and extroversion', *Africa Development*, Vol. XXXIII, No. 4, pp. 33–152.

Akpan, W., 2010, 'Confronting the referentialisation challenge: back to hope, being, and other "forgotten" sociologies', *South African Review of Sociology*, Vol. 41, No. 3, pp. 117–126.

Akpan, W., 2011, '"Local" knowledge, "global" knowledge, "development" knowledge: finding a new balance in the knowledge power play', *South African Review of Sociology*, Vol. 42, No. 3, pp. 116–127.

Alatas, S.F., 2000, 'Intellectual imperialism: definition, traits, and problems', *Southeast Asian Journal of Social Science*, Vol. 28, No. 1, pp. 23–45.

Alatas, S.F., 2003, 'Academic dependency and the global division of labour in the social sciences', *Current Sociology*, Vol. 51, No. 6, pp. 599–613.

Alatas, S.F., 2006, 'The autonomous, the universal and the future of sociology', *Current Sociology*, Vol. 54, No. 1, pp. 7–23.

Alves, J.A. and Vargas, J.C., 2020, 'The spectre of Haiti: structural antiblackness, the far-right backlash and the fear of a black majority in Brazil', *Third World Quarterly,* Vol. 41, No. 4, pp. 645–662. (https://doi.org/10.1080/01436597.2019.1695116). 13 June 2021.

Alves, J.A., 2011, 'Topografias da violencia: necropoder e governamentalidade espacial em Sao Paulo [Topographies of violence: necropower and spatial governmentality in Sao Paulo]', *Revista do Departamento de Geografia da USP,* Vol. 22, pp. 108–134.

Alves, J.A., 2014a, 'On mules and bodies: black captivities in the Brazilian racial democracy', *Critical Sociology*, Vol. 42, No. 2, pp. 229–248.

Alves, J.A., 2014b, 'Neither humans nor rights: some notes on the double negation of black life in Brazil', *Journal of Black Studies*, Vol. 45, No. 2, pp. 143–162.

Alves, J.A., 2018, *The Anti-Black City: Police Terror and Black Urban Life in Brazil*, Minneapolis: University of Minnesota Press.

Amin, S., 2009 [1989], *Eurocentrism: modernity, religion, and democracy: a critique of Eurocentrism and culturalism*, New York: Monthly Review Press.

Anderson, B., 1983, *Imagined Communities: Reflections on the Origin and Spread of Nationalism*, London: Verso.

Andrews, G.R., 1996, 'Brazilian racial democracy, 1900–90: an American counterpoint', *Journal of Contemporary History*, Vol. 31, No. 3, pp. 483–507.

Barrientos, A., 2013, 'The rise of social assistance in Brazil', *Development and Change*, Vol. 44, No. 4, pp. 887–910.

Bonilla-Silva, E. & Zuberi, T., 2008, 'Toward a definition of white logic and white methods, in T. Zuberi & E. Bonilla-Silva, eds., *White Logic, White Methods: Racism and Methodology*, Lanham: Rowman and Littlefield Publishers, Inc.

Burden-Stelly, C., 2018, 'Black studies in the westernized university: the interdisciplines and the elision of political economy', in J. Cupples and R. Grosfoguel, eds., *Unsettling Eurocentrism in the Westernized University*, London: Routledge.

Central Intelligence Agency, undated, The World Factbook (https://www.cia.gov/the-world-factbook/). 20 June 2021.

Cesaire, A., 1972, *Discourse on colonialism*, New York: Monthly Review Press.

Chakrabarty, D., 2000, *Provincializing Europe: Postcolonial Thought and Historical Difference*, Princeton/Oxford: Princeton University Press.

Chilisa, B., 2012, *Indigenous Research Methodologies*. Los Angeles: SAGE Publications.

Collier, D., 1993, 'The comparative method', in A. W. Finifter, ed., *Political Science: the State of the Discipline II*, Washington, D.C: American Political Science Association, pp. 105–119.

Comaroff, J., and Comaroff, J., 2012, *Theory from the South: or How Euro-America is Evolving toward Africa*, New York: Paradigm Publishers.

Connell, R., 2007, *Southern Theory: the global dynamics of knowledge in social science*, Cambridge: Polity Press.

Diop, C.A., 1981, *Civilization or barbarism: An authentic anthropology*, Paris: Presence Africaine.

Esping-Andersen, G., 1985, *Politics against markets*, Princeton, N.J.: Princeton University Press.

Esping-Andersen, G., 1990, *The three worlds of welfare capitalism*, Cambridge: Polity.

Esping-Andersen, G., 2013, *Equality with a happy bourgeoisie: the social democratic road to equality,* Barcelona: Citeseer.

Fanon, F., 1963, *The wretched of the earth*, London: Penguin Books.

Fischer, Frank, Gerald J. Miller and Mara S. Sidney., 2007, *Handbook of Public Policy Analysis: Theory, Politics, and Methods*, eds., Boca Raton: CRC Press/Taylor and Francis Group.

Gee, W., 1950, *Social science research methods*, New York: Appleton-Century-Croft.

Gordon, L.R., 2014, 'Disciplinary decadence and the decolonisation of knowledge', *Africa Development*, Vol. XXXIX, No. 1, pp. 81–92.

Gordon, L.R., 2019, 'Decolonising philosophy', *The Southern Journal of Philosophy*, Vol. 57, pp. 16–36.

Hall, S., 2019 [1992], 'The West and the rest: discourse and power', in D. Morley, ed., *Stuart Hall: Essential Essays Volume 2*, Durham: Duke University Press.

Hasenbalg, C., and Huntington, S., 1982, 'Brazilian racial democracy: reality or myth', *Humboldt Journal of Social Relations*, Vol. 10, No. 1, pp. 129–142.

Holliday, I., 2000, 'Productivist welfare capitalism: social policy in East Asia', Political Studies, Vol. 48, pp.706–723.

Hoppers, C.O. and Richards, H., 2012, *Rethinking Thinking: Modernity's 'Other' and the Transformation of the University*, Pretoria: University of South Africa.

Horne, G., 2007, *The Deepest South: The United States, Brazil, and the African slave trade*, New York: New York University Press.

Hountondji, P., 1990, 'Recherche et extraversion: éléments pour une sociologie de la science dans les pays de la périphérie', *Africa Development,* Vol. XV, No. ¾, pp. 149–158.

Huchzermeyer, M., 2002, 'Informal settlements: production and intervention in twentieth-century Brazil and South Africa', *Latin American Perspectives,* Vol. 29, No. 1, pp. 83–105.

Huchzermeyer, M., 2004, *Unlawful Occupation: Informal Settlements and Urban Policy in South Africa and Brazil*, Trenton NJ: Africa World Press.

Leubolt, B., 2013, 'Institutions, discourse and welfare: Brazil as a distributional regime', *Global Social Policy*, Vol. 13, No. 1, pp. 66–83.

Leubolt, B., 2014, *Social policies and redistribution in Brazil*, Global Labour University Working Paper No 26, pp. 1–31.

Leubolt, B., 2015, 'From inclusive liberalism to inclusive developmentalism: the recent transformation of the Brazilian distributional regime', *Geopolitics, History, and International Relations*, Vol. 7, No. 1, pp. 62–89.

Lodge, M., 2007, 'Comparative public policy', in F. Fischer, G.J. Miller and M.S. Sidney, eds., *Handbook of Public Policy Analysis: Theory, Politics and Methods*, Boca Raton: CRC Press/Taylor and Francis Group, pp. 273–289.

Lunn, Jenny, 2013, ed., *Fieldwork in the global South: Ethical Challenges and Dilemmas*, London: Routledge.

Mafeje, A., 1991, *The Theory and ethnography of African social formations: The case of the interlacustrine kingdoms*, Dakar: CODESRIA Book Series.

Mafeje, A., 1992, *In Search of an Alternative: A Collection of Essays on Revolutionary Theory and Politics*, Harare: SAPES Books.

Mafeje, A., 1996, *Anthropology and Independent Africans: Suicide or End of an Era?*, Dakar: CODESRIA Monograph Series No.4/96.

Mafeje, A., 2001, *Anthropology in Post-Independence Africa: End of an Era or the Problem Self-Redefination* [sic], Nairobi: Heinrich Böll Foundation.

Magubane, B., 1979, *The Political Economy of Race and Class in South Africa*. New York: Monthly Review Press.

Mamdani, M., 1996, *Citizen and Subject: Contemporary Africa and the Legacy of Late Colonialism*, Princeton: Princeton University Press.

Mamdani, M., 2013, *Define and Rule: Native as Political Identity*, Johannesburg: Wits University Press.

Mamdani, M., 2021, *Neither Settler nor Native: The Making and Unmaking of Permanent Minorities*, Johannesburg: Wits University Press.

Marx, A., 1998, *Making Race and Nation: A Comparison of the United States, South Africa and Brazil,* Cambridge: Cambridge University Press.

Mignolo, W., 2009, 'Epistemic disobedience, independent thought and decolonial freedom', *Theory, Culture & Society*, Vol. 26, No. 7–8, pp. 159–181. (https://doi.org/10.1177/0263276409349275). 13 June 2021.

Mignolo, W., 2011, *The Darker Side of Western Modernity: Global Futures, Decolonial Options*, Durham, N.C: Duke University Press.

Mitchell, L., 1999, 'Combining focus groups and interviews: telling how it is; telling how it feels', in R.S. Barbour and J. Kitzinger, eds., *Developing Focus Group Research: Politics, Theory and Practice*, London: Sage.

Mkandawire, T., and Yi, I., 2014, 'Overview: learning from developmental success', in T. Mkandawire and I. Yi, eds., *Learning from the South Korean developmental success: effective developmental cooperation and synergistic institutions and policies*, New York: Palgrave MacMillan, pp. 1-11.

Mkandawire, T., 2005, 'African intellectuals and nationalism', in T. Mkandawire, ed., *African Intellectuals: Rethinking Politics, Language, Gender and Development,* New York: Zed Books.

Moran, Michael, Rein, Martin and Goodin, Robert, E., 2018, *Oxford Handbook of Public Policy*, Oxford: Oxford University Press.

Mudimbe, V.Y., 1988, *The invention of Africa: gnosis, philosophy, and the order of knowledge*, Bloomington, Indianapolis: Indiana University Press.

Nguyen, V.K., 2005, 'Antiretroviral globalism, biopolitics and therapeutic citizenship', in A. Ong and S.J. Collier, eds., *Global Assemblages: Technology, Politics and Ethics as Anthropological Problems*, Oxford: Blackwell Publishing, pp. 124–145.

Nkrumah, K., 1973, *Revolutionary Path*, London: Panaf Books.

Nyoka, B., 2013, 'Negation and affirmation: a critique of sociology in South Africa', *African Sociological Review,* Vol. 17, No. 1, pp. 2–24.

Nyoka, B., 2016, 'Bernard Magubane's "The Making of a Racist State" revisited: 20 years on', *Journal of Black Studies*, Vol. 47, No. 8, pp. 903–927.

Nyoka, B., 2019, 'Archie Mafeje as revolutionary sociologist', *Theoria*, Vol. 66, No. 158, pp. 1–26.

Oyewùmí, O., 2002, 'Conceptualizing Gender: The Eurocentric Foundations of Feminist Concepts and the Challenge of African Epistemologies', *A Journal of Culture and African Women Studies*, Vol. 2, No. 2.

Phiri, M.Z., 2017, 'Comparative perspectives on South Africa's and Brazil's institutional inequalities under progressive policies', *Journal of Southern African Studies*, Vol. 43, No. 5, pp. 961–978. (https://doi.org/10.1080/03057070.2017.1343009). 13 June 2021.

Phiri, M.Z., 2020a, 'Social assistance in national social policy architectures: a comparative study of South Africa's and Brazil's selected districts', Unpublished Doctoral Dissertation, University of South Africa.

Phiri, M.Z., 2020b, 'History of racial capitalism in Africa: violence, ideology and practice', in S.O. Oloruntoba and T. Falola, eds., *Palgrave Handbook of African Political Economy*, New York: Palgrave MacMillan.

Porter, J., 1970, 'Some observations on comparative studies', in D. Forcese and S. Richer, eds., *Stages of Social Research*, Englewood Cliffs, N.J.: Prentice Hall, pp. 141–154.

Ragin, C., 1981, 'Comparative sociology and the comparative method', *International Journal of Comparative Studies*, Vol. 22, pp. 102–120.

Rokkan, S., 1966, 'Comparative cross-national research: the context of current efforts', in R. Meritt and S. Rokkan, eds., *Comparing Nations*, New Haven: Yale University Press.

Said, E., 1978, *Orientalism*, London: Routledge & Keagan Paul Ltd.

Said, E., 1993, *Culture and Imperialism*, New York: Vintage Books.

Said, E.,1994, *Representations of the Intellectual*, London: Vintage.

Sandoval, C., 2000, *Methodology of the Oppressed,* Minneapolis: University of Minnesota Press.

Sartori, G., 1970, 'Concept misinformation in comparative politics', *American Political Science Review*, Vol. 64, No. 4, pp. 1033–1053.

Seidman, G., 2010, 'Brazil's "pro-poor" strategies: what South Africa could learn', *Transformation: Critical Perspectives on Southern Africa*, Vol. 72, No. 73, pp. 86–103.

Short, S.E., 2006, 'Focus group interviews' in E. Perecman and S.R. Curran, eds., A *Handbook for Social Science Research: Essays and Bibliographic Sources on Research Design and Methods*, Thousand Oaks: Sage Publications, pp. 103–116.

Shrank, A., 2006, 'The case study and causal inference', in E. Perecman and S.R. Curran, eds., *A Handbook for Social Science Research: Essays and Bibliographic Sources on Research Design and Methods*, Thousand Oaks: Sage Publications, pp. 169–175.

Skocpol, T., and Somers, M., 1980, 'The uses of comparative history in macrosocial inquiry', *Comparative Studies in Society and History*, Vol. 22, No. 2, pp. 174–197.

Skocpol, T., 1979, *States and Social Revolutions*, York: Cambridge University Press.

Smith, L.T., 2012 [1999], *Decolonizing Methodologies: Research and Indigenous Peoples*, London: Zed Books.

Telles, E.E., 2004, *Race in Another America: The Significance of Skin Color in Brazil*, Princeton, NJ: Princeton University Press.

Van der Westhuizen, J., 2012, 'Falling on Fertile Ground? The Story of Emerging Powers' Claims for Redistribution and the Global Poverty Debate', *Global Society*, Vol. 26, No. 3, pp. 331–350.

Van der Westhuizen, J., 2013, 'Class Compromise as Middle Power Activism? Comparing Brazil and South Africa', *Government and Opposition*, Vol. 48, No. 1, pp. 80–100.

Verba, S., 1967, 'Some dilemmas in comparative research', *World Politics*, No. 20, pp. 11–27.

wa Thiong'o, N., 1986, *Decolonising the Mind: The Politics of Language in African Literature*, Nairobi: Heinemann Publishing Ltd.

wa Thiong'o, N., 2012, *Globalectics: Theory and Politics of Knowing*, New York: Columbia University Press.

World Bank, 2000, *Voices of the Poor: Can Anybody Hear Us?*, Oxford: Oxford University Press.

Zeleza, P.T., 2002, 'The politics of historical and social science research in Africa', *Journal of Southern African Studies*, Vol. 28, No.1, pp. 9–23.

Zeleza, P.T., 2019, 'Reckoning with the pasts and reimagining the futures of African studies for the 21st century', Keynote Address at the Social Science Research Council Training Workshop, United States International University-Africa, Nairobi, January 7, 2019, African Peacebuilding Network Lecture Series, No. 4, New York: Social Science Research Council.