

Southern Theory and Postcolonial Comparative Education

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Summary and Keywords

Since the late 1960s and early 1970s, lot of criticism has been made about the colonial heritage of early ethnographic research. In the past decade of the twenty-first century, scholars have also raised concern also about the colonial heritage of comparative education. Erwin Epstein defined comparative education as “the application of the intellectual tools of history and social sciences to understand international issues of education.” Hence it is important for comparative education as a global field of study to engage with the recent debates in social sciences to generate deeper understanding about educational problems embedded within specific international contexts. The dominance of Northern theory in analyzing research data from the Global South has been increasingly critiqued by scholars in a number of scholarly publications since Raewyn Connell published her book *Southern Theory* in 2008. They have argued that Northern theory arising out of the colonial metropole is provincial in nature and, therefore, provides incomplete interpretation of data and generates misunderstanding or limited understanding of social phenomenon occurring in the hybrid contexts of the Global South. Therefore, lately scholars have been debating about postcolonial comparative education to argue for the relevance of Southern theory in conducting postcolonial comparative education research for both analytic (ideological), as well as hermeneutic (affective historical) engagement with research data. Drawing on the methodological insights from an empirical case study, this article demonstrates why Southern theory drawing on Tagore’s philosophy of education was found more suitable to analyze research data arising out of a case study designed to conduct an institutional ethnography in a particular international context. It demonstrates how contextually relevant Southern theory helped to provide deeper comparative understanding (*verstehen*) of a social phenomenon, i.e. inclusive pedagogic work of an old colonial school within a particular historical, geopolitical and cultural context in postcolonial India.

Keywords: Southern theory, comparative education, postcolonial, institutional ethnography, case study, India, Tagore

Introduction

Pieterse (2001, p. 2) has argued:

Theory is a distillation of reflections on practice into conceptual language so as to connect with past knowledge. The relationship between theory and practice is uneven: theory tends to lag behind practice, behind innovations on the ground, and practice tends to lag behind theory (since policymakers and activists lack time for reflection). A careful look at practice can generate new theory, and theory or theoretical praxis can inspire new practice. Theories are contextual. While theories react to other theories and often emphasize differences rather than complementarities, the complexities encountered in reality are such that we usually need several analytics in combination.

Bhambra (2007), Chakrabarty (2007), Chen (2010), and Connell (2007) have critiqued that Northern theory arising out of the colonial metropole is provincial in nature, and, therefore, provides incomplete interpretation of data and generates misunderstanding or limited understanding of social phenomenon occurring in the hybrid contexts of the Global South. The term “Southern theory” was introduced to the academic literature by Australian sociologist Raewyn Connell (2007) to refer to sociological concepts from the Global South. These sociological concepts from the Global South are generally not taken seriously as theory within academia. Raewyn Connell’s book *Southern Theory* (2007) offered sharp critique of some of the noted social theorists from the Global North—Coleman, Bourdieu, Giddens, and Beck. She offered a compelling account of what these Northern theorists efface in their theorizing of the social world. Connell (2013, p. 210) makes a case for using Southern theory to emphasize the “global dynamics of knowledge in social sciences” and “to develop new knowledge projects and new ways of learning with globally expanded resources.” But before making a case for Southern theory, Connell first critiques Northern theory. In the first section of her classic book, *Southern Theory*, she demonstrates how social theory coming out of specific imperial geopolitical, cultural, and socioeconomic contexts of the Global North and colonial metropole during the final two decades of the 19th century and first decade of the 20th century does not capture the life-world and experiences of the former colonies of the Global South. Connell (2013, p. 9) asserts that “sociology was formed within the culture of imperialism, and embodied an intellectual response to the colonised world.” She brings the idea of “global difference” into her discussion to highlight how the colonized world and “other” cultures were seen as “primitive” by the colonial metropole. However, despite such colonial cultural stereotyping as “primitive,” Connell (2007, p. 14) writes, “changes in culture and social life were central issues to writers as diverse as al-Afghani in the Islamic Middle East (see Chapter 6), Chatterjee and Tagore in Bengal (see Chapter 8), and Sun Yat-sen (1927) in China.”

Critique of Northern Theory

Connell (2007) focuses on the work of three major sociological thinkers of the Global North—James S. Coleman, Anthony Giddens, and Pierre Bourdieu—and contemporary globalization theorists, such as Bauman and Beck, to highlight the problematic of general (or universal) social theory emerging out of the mainstream experiences of the Global North and colonial metropole, which does not take into account the historical experiences of the marginalized communities of the North and that of the colonies in the Global South. The Coleman Report is considered quite radical with regards to discussion, debates, and policies about race and schooling in the United States, which led to the school desegregation movement. However, Connell (2007) critiques Coleman for his silences about the “capitalist” state, “state and corporation” connection, historical experiences of colonies and slavery in his *Foundations of Social Theory* (1990). She identifies gaps in his quantitatively-driven sociological analysis, as it ignores the historical experiences of slavery and domination. Connell (2007, p. 33) writes, “He treats slavery briefly, in terms of the intellectual problem it creates for an exchange theory of society. (His memorable solution is that it is rational for the slave to accept enslavement if the alternative is death.)” Hence, Connell (2007, p. 33) concludes that, “despite the universal ambitions of the theory, then, *Foundations* misses or misrepresents vast tracts of human history, and ignores the social experience of the majority of the world now.”

Connell (2007, p. 37) finds similar gaps in Anthony Giddens’ theory of structuration in *The Constitution of Society* (1984) as she writes:

The relationship that *Constitution* does not theorise is colonisation; the structuring principle it does not explicitly name is imperialism; and the type of society that never enters its classifications is the colony. . . . For a world-spanning book of general social theory, written in the heartland of the greatest imperial power the world had ever seen, this is interesting. The struggle for de-colonisation was certainly one of the most dramatic and important changes, on a world scale, in Giddens’ lifetime.

Connell also offers a sharp critique of Bourdieu’s theorizing in his *Logic of Practice* (1972) as the anti-colonial struggle in Algeria appear irrelevant for his conception of theory compared to the conception by French Algerian postcolonial theorist Franz Fanon, even if Bourdieu’s ethnographic work, studying daily lives of Berber-speaking community, is also set in colonial Algeria. The following quote is significant to further understand Connell’s (2007, p. 44) main point of criticism against the Northern theory coming out of the writings of European social theorists:

Knowledge about a colonised society is acquired by an author from the metropole and deployed in a metropolitan debate. Debates among the colonised are ignored, the intellectuals of colonised societies are unreferenced, and social process is analysed in an ethnographic time-wrap. The possibilities for a different structure

of knowledge that undoubtedly existed in Bourdieu's early research are never realised in the later theorising.

Thereafter, Connell (2007, p. 66) offers sharp critique of contemporary "globalization" theory and demonstrates how these theories were drawn out of the social processes and experiences by metropolitan intellectuals of the Global North and "read outwards to societies in the periphery, where the categories are filled in empirically." Such theorizing does not take a historical approach to account for the fact that globalization is not making a "new kind of society" for the vast majority of people in peripheral societies of the Global North and the Global South. For these peripheral societies, globalization could be seen as a historical continuation of processes of colonization, which benefitted mostly the elites of the peripheral colonized societies and the colonial metropole.

Why Southern Theory?

Connell (2007) further argues that the transformation of colonized societies under the impact of imperialism is also not taken into account by the social theorists of the Global North. This transformation of colonized societies is captured well in the contextual social-psychological analysis of Ashis Nandy. As Nandy (1983, p. xi) argued, the dilemma of the postcolonial condition is that:

colonialism colonizes minds in addition to bodies and it releases forces within colonized societies to alter their cultural priorities once and for all. In the process, it helps generalize the concept of the modern West from a geographical and temporal entity to a psychological category. The West is now everywhere, within the West and outside, in structures and in minds.

Such insight is often missing in the analysis of social theorists from the Global North. Hence, the analysis of the impact of global processes, such as globalization, on the peripheral societies is often not complete, as generalization is based on an analytical model already developed by the metropolitan societies of the Global North.

Therefore, Connell argues that, by studying the work of intellectuals and social theorists from the Global South and by using Southern theory to frame the research under study, a historical perspective of these societies cannot get more inclusive, and an understanding of social processes deeper. Connell's critique of Northern theory as a way of building a case for using Southern theory to frame research goes beyond the argument of postcolonial historian Dipesh Chakravarty's (2007) argument formulated in *Provincializing Europe* (2000). In many ways, Connell's critique of Northern Theory to build a case for using Southern theory to analyze empirical data from the South resonates with Taiwanese scholar Kuan-Hsing Chen's (2010, p. 113) appeal in *Asia as a Method* where he argues that "our research and discursive practices can become critical forces pushing the incomplete project of decolonization forward. At the very least we must strive to decolonize ourselves." Drawing on Chen's appeal, Park (2017) also argues for an Asia-centric methodology in comparative education to generate more contextually relevant knowledge in the

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field. Such an approach can be critiqued as methodologically nationalistic and provincial, just as Northern theory. However, “while methodological nationalism in the global north can be seen to be embedded in a theory of colonial modernity; in the global south it [is] located in a contestation of colonial modernity and a desire to establish understandings of its own histories of modernity” (Bhambra 2014, p. 107). Therefore, Patel (2014) suggests that it is important to generate endogenous (not indigenous) knowledge from the Global South. Moreover, it is also important to acknowledge that the nationalist framework is a colonial construct, and the fact that there are other sites of knowledge production. These are the concepts generating out of social movements by marginalized communities.

Connell’s work in *Southern Theory* also resonates with Argentine semiotician Mignolo (1993, pp. 129–131), who argues that “the Third World produces not only ‘cultures’ to be studied by anthropologists and ethnohistorians but also intellectuals who generate theories and reflect on their own culture and history.” Mignolo (2000) argues that the very division of the world into the binary of North vs. South, East vs. West and First world vs. Third world is a division drawn according to colonial logic of modernity arising out of the processes of the first industrial revolution in the Global North and the West, and spreading to the rest of the world from there. Such linear thinking about history and development does not consider that historical processes could be cyclical, and there could have been parallel or multiple modernities. It does not take into account that some of the oldest higher education institutions in the world (which later declined for some reason) were located in the East, in other words, the countries of the Global South. Hence, modernity in certain parts of this world could have preceded the colonial modernity of the West and Global North. Such linear thinking about history and development also does not take into account the disruption that was caused in societies of the Global South and the East through the process of colonial intervention.

A similar argument has also been put forward by several scholars from Africa, Latin America, the Middle East and India in the past decade which includes Rajesh Tandon and Bud Hall, UNESCO Chairs in community-based research and social responsibility in higher education. Hall and Tandon (2017) discuss at length the need for “decolonization of knowledge” by recognizing “epistemologies of the South” for “cognitive justice,” as argued by Sousa Santos (2007). They further quote from Indian sociologist Shiv Viswanathan (2009), expanding on the issue of cognitive justice to argue for participatory research in Asia:

The idea of cognitive justice . . . sensitizes us not only to forms of knowledge but [also] to the diverse communities of problem solving. What one offers then is a democratic imagination with a non-market, non-competitive view of the world, where conversation, reciprocity, translation create knowledge not as an expert, almost zero-sum view of the world but as a collaboration of memories, legacies, heritages, a manifold heuristic of

problem solving, where a citizen takes both power and knowledge into his [or her] own hands.

Hence, *Southern Theory* highlights the global politics of knowledge, since the Global South has been historically treated as a data mine, while the Global North has been associated with the intellectual work of generating theory. The purpose of Southern theory was to move beyond the binary of North and South power dynamics in generation of knowledge.

However, Isaac Ariail Reed (2013) has noted that Connell failed to provide an epistemological account of how the concepts under investigation would reorient analysis and explanation of social phenomenon informed by Southern theory. The sharpness of Connell's critique against Northern theory is lost in the polyphony of indigenous philosophies and intellectual history from the Global South, without offering any generalization and theoretical concepts. Hence, Reed (2013) calls for the need to generate theoretical concepts from the Global South to provide interpretations that offer better comparative description of the social world in different space and time.

Postcolonial Comparative Education

Much like other social science disciplines in academia, the established global field of comparative education has also been driven by Northern scholars and theories. Although from the very beginning comparative education has been concerned with issues of cultural difference while studying and comparing education systems initially in Europe and then around the world, the field of study has also been driven by Northern sociological theory and assumptions about the Global South as a data mine. One of the noted scholars in the field, Erwin Epstein (2008, p. 373), defines comparative education as "the application of the intellectual tools of history and the social sciences to understanding international issues of education." However, in an editorial issue of *Comparative Education Review* by Takayama, Sriprakash & Connell (2015, p. S5) cited from Altbach's (1991, p. 494) Comparative and International Education Society presidential address to highlight the issue that: "the field's knowledge 'base is highly unequal'; the field's flagship journals are all based in the United States and Britain so the 'gatekeepers' of knowledge are in major English 'speaking countries'." Hence, the "application of the intellectual tools of history and social sciences" referred to by Epstein (2008, p. 373) is also a Euro-American-centric understanding and knowledge of history and social sciences.

Close analysis of the work of one of the most celebrated founding fathers of the field, Isaac L. Kandel, by Takayama et al. (2015), therefore finds many "darker side of comparative education" as they quote from Hayhoe and Mundy (2008, p. 5) to analyze "the increasing use of comparative research in the design and reform of colonial education." They assert, "we believe that this prehistory of entanglement with colonialism and neo-colonialism warrants careful investigation, because it has conditioned the foundational knowledge of the field" (Takayama et al., 2015, p. S8). Kandel's analysis of education in

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the colonial dependencies for the 1931 *Educational Yearbook* is based on Euro-American-centric civilizational assumptions. Rather than reflecting on the colonial history and subjectivities of the peripheral societies of the Global South and power relations as probable causes for uncritical “policy of assimilation, an attempt to transplant modern education systems” in peripheral societies of U.S. occupied Puerto Rico and Philippines, Kandel (1932) attributes such practice to an effect of civilizational gap. Therefore, he calls for the need to adapt policies and practices according local cultures and folkways of the “backward peoples of the Near East and in colonial dependencies” (as cited by Takayama et al., 2015). Takayama et al. (2015, pp. S9–S10) further emphasize that:

Kandel’s call for adaptation can be interpreted as a sign of his respect for national differences, but when considered in relation to his acceptance of the Eurocentric narrative of civilizational stages, a rather different connotation can be seen. It fits with the racialized scheme of stages of maturity or civilization wherein colonial subjects were placed at the bottom of an evolutionary progression.

Comparative education as a field of study has been from the very beginning influenced by intellectual trends in related social sciences. Often these trends did not meet with great acceptance from some of the noted scholars in the field. Epstein and Carroll’s (2005) scathing critique of the “postmodern deviation in comparative education” with the phrase “Abusing Ancestors” in the title is a very relevant example here. However, such critiques from senior scholars have not stopped comparative education researchers from being influenced by the intellectual trends in the related field of social sciences. Societies and cultures are not static entities. As societies and cultures change, and so does the academic discipline of social sciences. “Setting normative boundaries and crucial epistemological benchmarks” (Epstein, 2008) for a field of study is necessary to define the field. But, what happens when we start asking questions about whose norms and whose epistemology?

Most of the founding fathers of the field of comparative education are seen as “historical functionalists” (Epstein, 2008; Epstein & Carroll, 2005). Societal context was important to them more than individuals in thinking about and analyzing educational data. The importance of context is integrally important to comparative education as a field of study. However, does nation-centric contextual analysis capture the complexity of the postcolonial societies, where the concept of nation-state and national culture formation coincided with the advent of colonialism and fight against colonialism? Does the Northern/Western theoretical frameworks used to analyze comparative data from the colonial dependencies and postcolonial Global South capture the experiences, social thought, and debates in these societies? As Takayama et al. (2015) have argued in their editorial that it does not. After critically analyzing some of the classic texts in comparative education by the founding fathers of the field, they argue that Southern theory and a “postcolonial perspective forces us to think deeply not just about the epistemological but the ontological question of what it means to be comparativists” (Rappleye & Komatsu, 2015, as cited in Takayama et al., 2015).

What It Means to Be a Comparativist?

This epistemological and ontological question of what it means to be a comparativist is very important to reflect at this juncture of the development of comparative education as a global field of study. Though the field of study originally emerged out of North American and European contexts, with the U.S. and U.K. comparative education societies still holding strong positions within the World Council of Comparative Education Societies (WCES) yet, right now there are many national-, regional-, and language-based societies around the world under the umbrella of the WCCES. Comparative education has always involved transnational research. But, what happens to the epistemological and ontological question when a transnational researcher with double consciousness, as defined by Du Bois (1903), enters the field in the Global South with research ethics clearance and theoretical framework following the norms of a Northern and Western University? How does she resolve the ethical dilemmas of epistemic space and place to establish intercultural dialogue in research practice? In the following sections of this article, I will share how I established intercultural dialogue in research practice and how I engaged with Southern theory emerging from the field to generate deeper understanding of the social phenomenon under investigation—inclusive pedagogic work of an old colonial school in India.

After being trained in the United States as a comparativist, when I returned to my native country, India, from Australia for conducting fieldwork, I realized how often the context and the researcher's relation to their specific research context is not given utmost importance in qualitative social science endeavors. Through hegemonic trends of North-to-South knowledge transportation, continued by researchers affiliated with Northern universities, the visibility of a Southern research context is often lost. The global South remains the data mine for the Global North where theories are generated to test hypothesis, utilizing data from the South. Moreover, when it comes to negotiating ethical and theoretical issues in research endeavors, systems of ethical research protocol to guide research practice developed in the Global North are often considered universally applicable. As a diasporic researcher returning to my native country to conduct research, I realized that the context of a research project, especially one conducted in a Southern country context, should play more of an important role than it usually does in a researcher's ethical and theoretical decision-making process. I will henceforth discuss how I learned to use a participatory approach in reframing my research question and even my theoretical framework to better understand the inclusive pedagogic work of the case study school and the challenges to sustain this work in contemporary India.

Comparing Across Time and Space

My empirical research project adopted a case study approach to conduct institutional ethnography in order to understand a phenomenon of interest—inclusive pedagogical work of an old colonial school in India. I followed a more traditional case study approach and global-local relations theoretical framework to study the phenomenon during the re-

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search ethics clearance phase at my university in Australia. However, once I entered the field for conducting research in India, I began experiencing the difficulty of fitting available data into the methodological and theoretical framework approved by the university. Since the school was part of a global network of Irish Catholic school set up during British colonial times, the social actors connected to the school's inclusive pedagogic work were spatially dispersed in different parts of the world, including Australia and North America. The global-local connection theoretical framework appeared quite apt initially.

However, most of the responses to interview questions exploring global-local connection in facilitating inclusive pedagogic work fell flat on the respondents. Their postcolonial subjectivity and local culture of hospitality made the respondents too keen on seeking to please me with their answers. To quote one of the teachers in the school during an early interview, "What can I say to make you happy?" As a native-alien researcher with a double consciousness, it was not too difficult to understand that this was because of the dominant local social norms of gender (since this was a girls' school and most of the staff members were women), and general social norms of keeping face in front of guests and outsiders. As a researcher, I was put in a position of major ethical dilemma during fieldwork because of these cultural barriers.

Moreover, since the official data collection for this research began immediately following a major leadership transition after almost 30 years under former leadership during which the school received much acclaim for its inclusive educational work both nationally and internationally, a great deal of anxiety was observable not just among the school staff, but also among new school leadership. The school has been through waves of inclusion during its long history spanning over 150 years. So, it also became essential to conduct some historical biographical interviews with the retired school principal, retired teachers and alums, along with doing historical archival research on the school policies and leadership. Hence, like Vavrus and Bartlett (2006, 2009), I adopted an approach of vertical and transversal comparison to provide an "ethnographically informed study that compares across time and space" (Vavrus & Bartlett, 2009, p. 3), by paying detailed attention to "flows of people, actions, ideas, texts, and discourses" (Vavrus & Bartlett, 2009, p. 2) that shape the inclusive pedagogic work of the case study school.

Therefore, data collection and analysis took into account local understanding, philosophy, language, culture, and subaltern indigenous knowledge, as well as transnational processes, to generate understanding about "the ways in which historical trends, social structures, and national and international forces shape local processes at this site" (Vavrus & Bartlett, 2006, p. 96). Vavrus and Bartlett (2017) refer to this method as a comparative case study. The long history of the case and its global connections stressed "the importance of thinking historically in ways that were at once local and global" as Rizvi (2008, p. 113) has argued. In this way, my research design evolved to not just value cultural context, local indigenous knowledge, and complexity of local understandings, but also pro-

vide the contextual limits of knowledge by paying attention to larger global processes as a comparative case study (Vavrus & Bartlett, 2017).

Double Consciousness and Intercultural Dialogue

My double consciousness as a native–alien researcher belonging to a third space acculturated within Western social and academic environment posed unique subjective challenges and opportunities in the field. Du Bois (1903) used the term “double consciousness” as a psychological, political, and philosophical category to analyze the black experience in the United States torn between two conflicting sense of identity as an American and a Negro during the era of Jim Crow laws of racial segregation. However, here I borrow the term to highlight the dilemmas of a native–alien researcher acculturated within Western social and academic environment during fieldwork for this research. I suggest that being in a “third space,” as argued by Bhabha (1994), with regards to my own sense of identity was useful in epistemic reflexivity to reconcile the double consciousness of being a Bengali Indian native and an alien researcher from a Western university. It was useful in establishing intercultural dialogue using participatory methodology for generating meaningful research questions and data from the field. It was also useful in engaging with Southern theory drawing on indigenous philosophical traditions, as well as mainstream academic debates, and discourse on inclusive education and neoliberal globalization for data interpretation.

This aspect of dialogue was not just a solitary task of the transnational researcher with a double consciousness and her own research practice. This participatory element of dialogue had also permeated throughout the research process between the researcher and informants, between researcher with the texts produced through the primary dialogue with informants, with field notes and with archival publications of the school, and between researcher and research supervisors. Based on the premise that knowledge is socially organized, the knowledge generated in the thesis about the school’s work has been therefore organized by the polyphonic voices of various stakeholders of the school in the Bakhtinian sense as Smith (1990, p. 127) argued. The double consciousness of the native–alien researcher as an embodied knower has been useful in establishing intercultural dialogue in research and in seeking out subaltern voices during fieldwork. The researcher has been consciously reflexive in not privileging any particular voice and not according any overpowering role to a dominant discourse in writing the thesis. The aim of this research project was to understand the school’s conception of inclusive education, its strategies for promotion, and issues of sustaining inclusive reforms. In order to gain depth of understanding about all these three areas of the school’s work, data has been analyzed taking into account local understanding, philosophy, language, culture, and indigenous knowledge, as well as transnational processes which entwine the global and the local historically.

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However, it was not an easy task to seek out subaltern voices in order to identify gaps and silences in the existing research on the school's work. Within a complex postcolonial context, as a researcher I had to be conscious of the power-knowledge relationship at play whenever anybody arrives from a Western university to do research. The postcolonial social imaginary especially among the elites working within social institutions like the case study school is very strong. Hence, a mixture of a traditional Indian sense of hospitality toward a guest along with a sense of postcolonial defensiveness among research participants made it initially challenging to derive any meaningful critical data from the field to examine my initial research questions. Research participants were only too keen on speaking a scripted institutional language to show the good work that the school has been doing in a promotional way, although a certain structural reorganization of the institution was quite obviously visible to me when the fieldwork for this study began.

However, eventually my relational participatory approach in conducting institutional ethnography helped me to revise and reframe my original research questions. The two main research questions were thus designed to understand the school's conception of inclusive education that shaped programs of educational reform, and to examine the ways in which the school mobilized the ideological and material resources it needed to implement these programs. A third question also emerged about the sustainability of the school's reforms in light of the shifting organizational, ideological, and economic conditions. With regards to the first research question examining the school's conception of inclusive education, a number of social actors and respondents referred to progressive educational and social reform movements in the particular region of India since British colonial times.

Evidence of a strong legacy of intercultural dialogue within the particular Catholic order of schools was revealed in the historical writings of the official school historian Colmcille (1968), an Australian nun, who learned and also taught Bengali in the school. She also produced several socially progressive dance dramas written by Tagore, while working in the Jesuitess¹ schools in Calcutta. These dance dramas creatively dealt with issues of caste, gender, and other modes of social discrimination and oppression within the Indian society. Hence, I began engaging with Tagore's humanist philosophy of education theoretically to analyze field data pertaining to the school's inclusive pedagogic work. Analytical concepts, such as factory-model of schools used by Tagore to offer his sharp critique of the mechanical schooling system and concept of parrot's training to criticize mainstream pedagogy that promote rote-learning, proved to be very useful Southern theoretical concepts for both analytic (ideological) and hermeneutic (affective historical) engagement with data gathered from the field. During literature review, I found that there have been already some attempts at interpreting the pedagogic work of the school through Deweyan and Freirean analytical lenses. However, the theoretical concepts of experiential learning drawn from Dewey and conscientization drawn from Friere could not shed any light on the inclusive pedagogic work of the old colonial school. Dewey (1916) and Freire (1970) provide useful analytical tools to understand certain aspects of the school's pedagogic work. However, they do not provide affective historical or hermeneutic understanding of the school's inclusive pedagogic work over the years since colonial times.

Hence, in consultation with my research supervisors, I began engaging with Tagore's writings on education for more situated historical analysis of ethnographic data gathered through fieldwork.

A Southern Theory for Inclusive Education

My study of Tagore's (1906) writings on education revealed the problems of the mainstream factory model of schools in India, as they were a response to the first industrial revolution in Europe. This model of schools was replicated in the former colonies of the Global South through policy transfer. The design, curriculum, and pedagogy of these schools were totally disconnected from the lived experiences of Bengali children during Tagore's times. As a highly sensitive and creative child, Tagore's experience of formal schooling was, therefore, that of exclusion. The 19th-century industrial factory model of schools did not pay any attention to the individual learning needs of a child. Tagore was primarily home-schooled in a personalized learning environment because of his privileged and learned family background.

Tagore wrote his first critical essay on education "Shikshar Herfer" in 1892 (published later by Viswa Bharati University in English as "Topsy-turvy education"). Though this essay has not been included in any comparative education textbook yet, this essay could be a great text to read for introductory course in comparative education that would aim to enhance the reading list beyond texts emerging out of North America and Europe. According to Tagore, while both the language and the content of education were integrally connected to English life and society, they were completely disconnected from the life of Bengali children during colonial India. Hence, rote-memorizing rules of grammar and sentence structure were encouraged over critical thinking and understanding. Tagore argued that learning should be a joyous experience of mental and physical freedom for the child, and learning should be connected to the child's social and cultural environment. He also argued for a multilevel curriculum and well-trained teachers to stimulate critical thinking and creative imagination.

After reading several other essays on education written by Tagore and reading analysis of other scholars, who have read Tagore, much of the inclusive pedagogic work and policy reforms that the case study school had instituted over the years began to make sense for me as a researcher. Tagore's Southern theory, drawing on the philosophy of context argued by Peters (2012), suggested an alternative social epistemology and comparative thinking about education, society, and inclusivity within the colonial Indian context, which neither Dewey nor Freire could. Tagore (1892, p. 113) argued that the schooling systems in Europe were an integral part of their society, "but the schools in [India], far from being integrated to society, are imposed on it from outside." Although some of Dewey and Freire's pedagogic ideas share similarities with Tagore's, their pedagogic theories cannot historically situate the problems of externally implanted colonial factory-model of schools in India, as well as Tagore's.

Tagore (1906) stated:

what we now call a school in this country is really a factory, and the teachers are part of it. . . . Later this learning is tested at examinations and labelled. One advantage of a factory is that it can make goods exactly to order. Moreover, the goods are easy to label, because there is not much difference between what the different machines turn out. But there is a good deal of difference between one man and another, and even between what the same man is on different days.

In his own artistic way through the medium of his satirical short story, “The Parrot’s Training,”² Tagore further critiqued the factory-model of schooling, which promoted a pedagogy of “parrot’s training” and excluded many children from the education system. Hence, Tagore called for decolonizing the schools and pedagogy by drawing on the best practices of teaching and learning from ancient Indian *gurukul* and adapting them to modern conditions.

Hence, I argue that it can be useful to generate *verstehen* in further expanding the epistemological toolkit of comparative education if we would engage theoretically with intellectuals from the Global South, such as Tagore. Comparative education would then become a truly global field of study, inclusive of the global dynamics of knowledge in social sciences.

Why Tagore’s Southern Theory?

I have already written at length about Tagore’s Southern theory of inclusive education (Mukherjee, 2017) and how I have offered Tagorean analysis of the case study school’s inclusive pedagogic work (Mukherjee, 2018). In this article, I am seeking to answer why I decided to use Tagore’s Southern theory for analyzing empirical data from doctoral fieldwork. In order to do so, I will first raise a few questions here:

- What can explain the policy of a colonial English medium missionary school using bilingual mode of education in postcolonial India, while fines are still imposed on children for using mother tongue in most English medium schools?
- What can explain the school’s policy of making the students clean up after themselves within a strongly hierarchical Indian context, where cleaning work is done by servants?
- What can explain the policy of promoting teachers with the same group of students so that teachers, students, and peers can form a strong relational bond to facilitate peer learning?
- What can explain the model of breaking down large Indian classrooms of 50–60 children into small groups of 10 sitting together in circles learning by doing various activities?
- What can explain the policy of getting students engaged in social work after school and various sporting activities, rather than sending them back home early for cramming in tuition classes?

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- What explains the phenomenon when Bengali dance dramas by Tagore are organized in an English medium Catholic school?
- What explains when you see an English medium missionary school publishing big picture book on Indian religious and cultural festivals in Bengali for children in primary section?

These questions and several other questions kept bothering me for months as a native-alien researcher during my fieldwork for doctoral research. I had already read Walter Mignolo's critical decolonial writings about subaltern knowledge and border thinking by the time I entered the first phase of my fieldwork. Eventually, I could begin analyzing the data in front of my eyes only after reading Raewyn Connell's work on Southern theory, and then reading Tagore's writings on education.

Reading and using Tagore's writings theoretically was not simply ideological and affective as a Bengali Indian who grew up in postcolonial India, as many people can assume. Tagore's ideas and philosophy of education was very much rooted in the context of my fieldwork. This was also revealed from the evidence drawn from fieldwork. The case study school's inclusive pedagogic work began making more sense only when they were analyzed taking into account the syncretic formation of the inclusive pedagogic reforms and the influence of progressive pedagogic reforms in the region led by reformers, such as Tagore, who believed that:

- education is a relational process between the child, teacher, peers, and nature (environment);
- the child's experience is central to the educational process;
- the curriculum and pedagogic approach should revolve around the child's aptitude and ability;
- the teacher's role is central to the pedagogic process in nurturing creativity and critical thinking (as against preparing kids for tests by rote-memorizing school textbooks);
- education for the whole-child, which "nourishes the heart and the intellect" (Tagore, 1906)—involving social and emotional learning—as well as for vocation (livelihood);
- education should be community-oriented and should foster values of cooperation as against competition;
- education should also foster intercultural learning to promote global consciousness to counter hatred based on cultural misunderstandings.

(Mukherjee, 2017, p. 538)

By applying Tagore's theoretical ideas about child-centric, socially inclusive, community-oriented, and world-minded education to analyze the pedagogic work of the case study school, I have suggested the need for "thinking in an 'other' tongue" or "border thinking," as Mignolo (2000) suggested. Much of Mignolo's intellectual work, Alcoff (2007, p.

83) argues, has also been invested to “a reconstructive project [which] demands not only a new sociology of knowledge but also a new normative epistemology that can correct and improve upon the colonial worldview.” In a similar vein, Indian social theorist Ashis Nandy calls for a need to “start afresh in vernacular languages, in vernacular theoretical formations and formulations,” while highlighting the limitation of his own “writings because [his] work, to a large extent, is related to the colonial experience. [His] writings, partly, are a reaction to it” and postcolonial studies is a “by-product of Western intellectual effort” (Bilal, 2014, p. 726).

My reading of Tagore’s Southern theory of education and application of his theory to analyze data from empirical fieldwork suggests that these vernacular theoretical formations are already there within the rich repertoire of Indian languages and literature. Since the established academic setting has not taught us to read these texts theoretically in native languages and in English translation, we have not learned to use them analytically and to utilize these theoretical concepts derived from these writings for hermeneutic purpose. It would be important to read these literatures from the periphery to identify theoretical concepts, such as Tagore’s factory-model of schools and parrot’s-training kind of pedagogy for critically analyzing research data. This kind of “theoretical labor is necessary for a global sociology,” as Reed (2013) urged while critiquing the limitation of Connell’s Southern theory.

Conclusion

Inclusive education for all is still a far cry from the United Nation’s declaration of Education for All that was adopted in 1948. Quality inclusive education for all is also one of the primary focus of the Sustainable Development Goals, i.e. specifically SDG 4 adopted by the United Nations in 2015 to promote global goals to address the sustainability challenge of life on planet Earth in the 21st century. Perhaps it is time to reflect on the educational ideas of the social thinkers and education reformers from the Global South, such as Tagore’s Southern theory of inclusive education, especially since his theorizing on education and alternative model of schooling was a reaction against the highly standardized colonial model of schooling during the Victorian era, which had little room to pay any attention toward the diverse learning needs of students. While building his own alternative school, Tagore (1917, p. 138) wrote: “I know what it was to which this school owes its origin. It was not any new theory of education, but the memory of my school day.” Therefore, reading the work of indigenous intellectuals from various interdisciplinary backgrounds of the Global South and identifying analytical concepts as suggested by Connell’s (2007) critics such as Reed (2013) and Bhambra (2014) can provide rich intellectual resources to expand Southern theory. As Connell (2007, p. 223) also argued, “the only possible future for social science on a world scale involves a principle of unification,” that is, connecting “different formations of knowledge in the periphery with each other and with knowledge from the metropole” (Connelle, 2007, p. 213). It is time to expand the toolkit of history and social sciences by including Southern Theory in the analysis of research data to generate deeper understanding on international issues of education and to find solu-

tions to educational problems in the context of the Sustainable Development Goals. Such an inclusive epistemic approach will also make comparative education a truly global field of study.

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Notes:

(1.) The particular order of Irish Catholic scholastic nuns who run the schools are known as the "Jesuitess" since the founding Nun of the particular order wanted to establish a religious order for scholastic women similar to the Society of Jesus for men.

(2.) See online.

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