

JORON PIHL<sup>1</sup>

### 3. EPISTEMOLOGICAL AND METHODOLOGICAL CHALLENGES IN RESEARCH CONCERNING YOUTH AT THE MARGINS

#### INTRODUCTION

The purpose of this chapter is to discuss the epistemological and methodological challenges associated with research concerning youth at the margins. I relate the discussion primarily to educational research. I am concerned specifically with whether research concerning youth at the margins contributes to empowerment and social justice or actually reinforces marginalization. I will problematize this in relation to epistemological, theoretical and methodological considerations. In this discussion, I focus on the relationships between power, knowledge and social justice. In particular, I address the dialectics between material conditions (the economic structure and class relations), knowledge (research), and the effects of research concerning youth at the margins.

I use the concept “marginalization” as it relates to processes and actions that relegate an individual or group to a disadvantaged social position. Intrinsic to studies of marginalization are studies of exclusion (Carlile, 2011). Empirical studies tend to focus on exclusion of youth from education and work (Møller, 2013; OECD, 2009, 2010; Room, 1995; Vaught, 2011). Furthermore, youth at the margins are often assumed to be vulnerable to a plurality of disadvantages such as poverty, poor housing, educational failure and dropout (Møller, 2013; OECD, 2009, 2010; Vaught, 2011). Migrant youth and other ethnic minorities are particularly prone to become positioned within these disadvantaged social categories because of multiple forms of discrimination (Andersson, 2005; Blyth & Milner, 1996; Fangen, Fossan, & Mohn, 2010; Fangen, Johansson, & Hammarén, 2012; Hammer, 2003; Pihl, 2001). Researchers have explored the processes of marginalization and exclusion from intersectional and multilevel perspectives (Fangen et al., 2012). They have focused on the intersection of ethnic, gender and class background. They have conducted multilevel analyses that focus on the processes, social systems (welfare regimes, immigration policies and personal identities) and liberal conservative and social democratic policies at the European level (Fangen et al., 2012).

I argue that studies on the marginalization of youth should activate epistemologies that deconstruct and challenge the very foundation of conservative liberalism and social democratic policies. This is particularly important in times of deep economic crisis in capitalist economies, which contributes to the marginalization of youth. For instance, at present, one quarter of youth in the EU

between the ages of 15 and 24 years are unemployed. In Greece, 57 per cent of youth are unemployed; in Spain, 55 per cent; and in Italy, 42 per cent (Eurostat, 2013). Politicians and scholars refer to “lost generations”, which alludes to the fact that these youth are at risk of never entering the labor force. They risk permanent exclusion from work. Fundamental conflicts within the capitalist system are at the foundation of the economic and social crisis. In this context, epistemologies that challenge the very foundation of the capitalist economy and knowledge production are required.

Against this background, I introduce dialectic materialism (Marx, 1895; Marx & Engels, 2011) and Foucault’s post-structural epistemology (Foucault, 1979, 1994, 1995a). I focus on dialectic materialism because this epistemology deconstructs and transgresses dominant liberal discourses that explain and interpret marginalization within the framework of capitalism. Dialectic materialism amounts to a fundamental epistemological critique of liberalism, which is at the foundation of capitalism. A focus on post-structural epistemology developed by Foucault can provide important insights given his significant contributions to the analysis of the relationships between power and knowledge. I relate the following discussion to the field of education, with a particular focus on the marginalization of poor and non-white youth in Europe. I use the term “non-white” to highlight that “whiteness” is a premise for ethnic distinction, which usually goes unnoticed (Sleeter, 2001).

After discussing how dialectic materialism and post-structural epistemology conceptualize the relationship between power and knowledge, I conclude that these are counterhegemonic epistemologies. I then turn to youth uprisings and protests against poverty and racism in Europe and the USA. The youth uprisings and resistance were met by oppressive police actions and disciplinary discourses by the dominant elites. Power and knowledge took actions that disciplined and suppressed the youth resistance. Against this background, I discuss methodological considerations in educational research concerning youth at the margins. I analyze the research challenges by drawing on two case studies of youth at the margins. The first study highlights methodological strategies that unraveled institutional racism in school. The second study highlights a methodological strategy, which in fact contributed to marginalization and stigma. Whether a study empowers or oppresses youth at the margins depends partly on epistemological and methodological considerations. Counterhegemonic epistemologies and methodologies should inform studies of youth at the margins.

Finally, the discussion shifts to incorporate a focus on social justice and subsequent research implications. In line with Nancy Fraser (2003), I argue that social justice requires redistribution of material and cultural resources, participatory parity and international solidarity. I propose that critical ethnography and participatory action research that engages youth as co-researchers, are methodologies that may counter processes of marginalization in school and society.

*Culturalization of Youth 'At the Margins'*

In past decades, multicultural educational research has made substantial contributions towards an understanding of marginalization in schools. The impact of social class, cultural hegemony and racism in schools is well documented, particularly in Western countries (Foster, 1990; Ladson-Billings, 2001; May, 1994, 2009; Møller, 2013; Reay, 2004, 2006; Sleeter, 1986; Sleeter, 2008a; Sleeter & Silverman, 2005; Troyna & Carrington, 1990). Empirical studies document that within the framework of “equality of opportunity”, ethnic discrimination, segregation and institutional racism takes new forms. A strong manifestation of this is the disproportionate labelling of non-white students as “mentally retarded”, “emotionally disturbed” and “learning disabled”, with subsequent placement within segregated special needs education. This is prevalent in many countries in Europe as well as in the U.S.A. (Beratan, 2008; DiBello, Harlin, & Carlyle, 2007; Dyson & Gallannaugh, 2008; Guiberson, 2009; Pihl, 2009, 2010a).

The research documents how schools marginalize students based on social class, ethnic background and gender, and proposes changes in policy and pedagogy that recognize social and cultural diversity in schools. In spite of this, there has been a political backlash against multicultural education in the USA and Europe (May, 2009; Niëto, 2000; Schlesinger, 1992; Sleeter, 2008a; Sleeter & McLaren, 1995; Sleeter & Silverman, 2005). Assimilation policies also continue to marginalize students with minority backgrounds (OECD, 2009, 2010). Research documents that young minorities are particularly vulnerable to marginalization in times of economic crisis and that experience multiple dimensions of exclusion based on social class, ethnic background and gender (Andersson, 2005; Fangen et al., 2012; Gudmundsson, Beach, & Vestel, 2013). However, this knowledge does not seem to translate into changes that benefit youth at the margins. Thus, as researchers, we are challenged by a compelling question: under what epistemological and methodological conditions can studies concerning youth at the margins contribute to student agency and social justice? Good intentions are apparently not enough (Gorski, 2008). Neo-liberal educational policies dominate within the EU and other European countries (Davies & Bansel, 2007; Walford, 2013). Educational policy prioritizes strong competition between students, schools and countries. This competition is implemented and assessed on the basis of a national, standardized curriculum and national and international standardized testing, which produce negative effects, especially on poor students from a minority background (OECD, 2009, 2010).

Has educational research itself, however well intentioned, in any way contributed to the marginalization of youth at the margins? Critics argue that liberal multicultural educational research culturalizes social relations. The argument is that the research fails to address the class relations that marginalize students in school and the labor market. Critics argue that the research overemphasizes the “culture”, “identity” and “race” of minority students. Culturalization reifies cultural characteristics of individuals at the expense of a

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more nuanced analysis of structural relations that contribute to marginalization. This criticism is even articulated by scholars within critical multicultural educational research (Giroux & McLaren, 1989; Kincheloe & McLaren, 2002; May, 2009; May & Sleeter, 2010; McLaren, 1997; Sleeter & McLaren, 1995). The criticism necessitates a closer look at epistemological and methodological challenges related to qualitative research about youth at the margins.

In the following, I address dialectic materialism and post-structural epistemology, which in different ways provide a conceptual framework that facilitates the analysis of marginalization. The Marxist tradition is developed further by scholars within critical educational research (Freire, 2000; McLaren & Giroux, 1989; McLaren & Lankshear, 1994; McLaren & Leonard, 1993). These scholars situate marginalization and knowledge production both historically and politically.

#### DIALECTIC MATERIALISM

##### *The Economic Structure and Class Relations Constitute Consciousness*

Epistemology is the study of how we know what we know. It is the study of the nature, origin and limits of human knowledge, often called the theory of knowledge. Scholars often treat dialectic materialism and post-structural epistemology as opposites (Neuman, 2011). The assumption is that if we chose the former, we discard the latter. However, in this chapter I suggest that both epistemologies provide conceptual frameworks that are important in studies of marginalization, especially concerning the relationship between power and knowledge, which contributes to the marginalization of youth.

The overriding notion central to dialectic materialism is that the mode of production of material life conditions the processes of social, political and intellectual life in a given society.

In the social production of their existence, men [and women] inevitably enter into definite relations, which are independent of their will, namely relations of production appropriate to a given stage in the development of their material forces of production. The totality of these relations of production constitutes the economic structure of society, the real foundation, on which arises a legal and political superstructure and to which correspond definite forms of social consciousness. (Marx, 1895, p. 107)

The economic structure in society is the material foundation for the legal and political structure. Different economic structures generate different forms of superstructure and consciousness. This is evident in a feudal economy versus a capitalist economy, as an example. Marx and Engels studied the material foundations of capitalism. According to Marx and Engels (2011), exploitation of the working class by the ruling class is the foundation of the capitalist system. The capitalist exploits the working class, small farmers and fishermen and other workers by accumulating the surplus value of their labor. The capitalist makes

his/her living by owning the means of production. The proletariats and workers sell their work to the ruling class, which extracts surplus value in the process. Moreover, Marx and Engels maintain that the working class are entitled to the value of their work, but are subjected to exploitation under capitalism. Marx and Engels studied class relations, class struggle, capital, land property, wage-labor, the State, trade and the world market. They argued that the internal contradictions within the capitalist system, which is based on exploitation, eventually lead to a breakdown of the capitalist system. Class struggles and revolutions contribute to this breakdown. An implication of their analysis is that the class struggle against exploitation is ethical and legitimate.

Marx and Engels assumed that the material relations of production in society shape knowledge production, consciousness and thought. The exploitation of one class by another remains hidden by a set of ideas that Marx and Engels called ideology (Marx & Engels, 2011). Ideology comprises the dominating ideas taught in education, preached in churches and communicated through the media.

Marx and Engels contrasted dialectic materialism with epistemological idealism, which prioritizes mind over matter (Marx & Engels, 2011). Epistemological idealism holds that ideas, knowledge and culture are the primary sources of perceptions, knowledge and consciousness. Dialectic materialism and epistemological idealism have very different methodological implications. Methodologies based on epistemological idealism study ideas and consciousness, "culture", values and norms as such. Methodologies based on dialectic materialism study the dialectic relationships between the class relations in which people are positioned, and their ideas, consciousness and culture. The research focus is on the dialectics between material and mental conditions.

#### *The Ruling Ideas Are the Ideas of the Ruling Class*

Based on dialectic materialism, Marx and Engels asserted that the ruling ideas are the ideas of the ruling class in every epoch.

The ideas of the ruling class are in every epoch the ruling ideas, i.e. the class which is the ruling *material* force of society, is at the same time its ruling *intellectual* force. The class which has the means of material production at its disposal has control at the same time over the means of mental production, so that thereby, generally speaking, the ideas of those who lack the means of mental production are subject to it. (Marx & Engels, 2011, p. 169)

If we follow this line of argument, the dominant research discourses in a specific historical context, are the "ruling ideas" of the ruling class.

Marx and Engels defined private ownership and control over the material production as the foundation for "mental production" in society, that is, intellectual work. According to them, it is not the consciousness of men and women that determines their existence, but their social existence that determines their consciousness (Marx, 1895). The class relations under which people live constitute fundamental conditions for the development of consciousness. This goes for

researchers as well as for youth at the margins. I thus suggest that, as researchers, we need to explore the class relations within which knowledge production and marginalization takes place. We need to relate this to the actions and thoughts of different actors, including ourselves as researchers.

Those, who lack the means of mental production (intellectual production), are subjected to the ruling ideas of the ruling class (Marx & Engels, 2011). In other words, we can expect to find ruling ideas *about* youth at the margins *among* youth at the margins. In school students learn that they have equal opportunity and rights and that their success or failure is their individual responsibility. They do not learn that the educational system reproduces social inequality. The ruling ideas do not usually attribute marginalization to class domination, a cultural hegemony, a colonial legacy or institutionalized racism and discrimination. However, if teachers introduce students to critical theory and challenge them to use these concepts in analysis of their own position at the margins in school and society, students may develop critical consciousness and agency. Equipped with concepts such as exploitation, class system, class struggle, ideology, hegemony, imperialism and racism, youth can explore and name oppressive policies and ideology that they experience in school and society. Work with critical concepts may inspire and enable youth to engage in collective political struggles to change their position at the margins (Freire, 2000):

According to Marx and Engels (2011), the ruling ideas serve the social interests of the ruling class. This implies that the ruling class will use research for ruling, exploitation and class domination. Dialectic materialism assumes that at the level of social class there is a dialectic relationship between class interests and consciousness. At the individual level, people can choose to align with the interests of the social class to which they belong or to align with other class interests. People can decide based on critical reflection, consciousness and solidarity. At this point, knowledge plays a crucial role. Marginalized individuals and groups can reflect on and engage in social and political struggles (see also Fessenden in this volume) to alter their position at the margins in society. Even more privileged individuals such as researchers, can engage in solidarity with individuals and groups at the margins in society. In both cases, critical epistemology and theory play a crucial role.

Exploration of the life world of youth at the margins – their intentions, consciousness, experiences and interactions – is relevant in studies of marginalization. However, this focus is insufficient if the purpose is to counter marginalization and to contribute to liberation and social justice. For that purpose, researchers need to include analysis of the class relationships under which youth at the margins live and the dialectic relationships between these relations and their ideas and actions.

A criticism of neo-Marxist studies is that these often overemphasize social structure and underestimate how class hegemony is mediated by the suppression of cultural diversity (Andersson, 2007). Said's discourse analytical studies of Orientalism within a Foucault tradition highlights the intersection of class and culture in the exercise of hegemony and imperialism (Said, 1993, 1995, 2003). Class relations and racism are constitutive of consciousness (Foucault, 1974;

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Goldberg, 1993). In Western countries, marginalization is mediated by powerful hegemonic discourses that are linked to Western colonialism and imperialism. Historical awareness and attention to how hegemonic research discourses conceptualize youth at the margins is important. Recurring themes are that youth at the margins are culturally deprived, they are to blame for their position at the margins of society, and they are even a threat to society. It is especially the poor and non-white youth who are subjected to these hegemonic discourses and practices (see discussion below).

#### POST-STRUCTURAL EPISTEMOLOGY

*Discourse Is a Social Practice That Systematically Forms the Objective of Which It Speaks*

Post-structural epistemology provides new insight into how discourse, knowledge production and power relationships intersect. Post-structural epistemology has made significant contributions to methodologies within the studies of marginalization, particularly within feminist studies (Alcoff & Potter, 1993) and multicultural educational research and methodology (Kincheloe, McLaren, & Steinberg, 2011).

Foucault was a post-structural philosopher who built on Marx and Engels' analysis of capitalism. Foucault also explored power relations, ethics and the implications for research methodology (Foucault, 1981, 1991a). However, post-structural epistemology sees knowledge as inevitably shaped by discursive practices. Foucault assumed that power and knowledge are interrelated, but he did not conceptualize the relationships between power and knowledge in the same way Marx did. Foucault's epistemological position was that the ruling ideas are expressed in ruling discourses (Foucault, 1999) and that the discourses both exercise and produce power. His term power/knowledge captures this (Gordon, 1980).

A discourse is a social practice that systematically forms the object of which it speaks.

... no longer – treating discourses as groups of signs (signifying elements referring to contents or representation) but as practices that systematically form the objects of which they speak. (Foucault, 1995a, p. 49)

In other words, Foucault does not treat discourse as just a linguistic phenomenon or an expression of ideas. Foucault treats a scientific discourse as a form of social practice, which has material effects. As I see it, Foucault's epistemology incorporates a materialist dimension into the analysis of discourse. That is one of Foucault's very significant contributions. Scientific discourses about youth at the margins construct "marginalized youth" as a social phenomenon.

According to Foucault (1980), scientific discourses that address the same phenomenon establish "truth" about the phenomenon (Foucault, 1979, 1984). In relation to research concerning youth at the margins, the content of the knowledge

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production becomes vital – whether it empowers or marginalizes the youth. That has to do with the epistemological foundation of the research. Epistemology, theoretical perspective, methodology and the subsequent knowledge production construct truth about youth at the margins in a particular historical context.

### *Ethics*

Foucault introduces ethical considerations about the effects of the knowledge production as a key element in the research (Foucault, 1997). Ethical considerations take into account not only the respect for the integrity of youth at the margins and their informed consent about participation, but also the potential effects of producing knowledge about them. If we follow Foucault's epistemological assumptions, researchers should also take responsibility for the potential use of their research. This is, of course, difficult, some will say even impossible, since the use of research takes place after the research is finished. Foucault's challenge to us as researchers is that we should very carefully consider the use and misuse of our knowledge production when we design a study.

Scientific discourses both include and exclude knowledge about the phenomenon in question, thereby establishing a "discursive order". The discursive order establishes "a regime of truth", which excludes other knowledge about the phenomenon in question. According to Foucault, a regime of truth exercises "power/knowledge" (Foucault, 1980). This concept communicates that power and knowledge intersect and depend on each other. According to Foucault, power is not only oppressive in Marx's terms. Power/knowledge is also productive. One of Foucault's very challenging assertions is that the human sciences produce power/knowledge, which those in power invariably use to discipline and govern the population (Foucault, 1994). Foucault documents this in his studies of the history of discipline (Foucault, 1979), the history of sexuality (Foucault, 1984) and his study of madness and civilization (Foucault, 1973). Disciplining the population is fundamental to governing, according to Foucault. Post-structural epistemology thus shifts the theoretical focus from the analysis of the intentions of actors (researchers, informants) to the analysis of the *effects* of discursive practices, including research. This shift in the definition of purpose away from the study of intentions and meaning, to the study of the effects of discursive practices on people and social relations, is a fundamental shift away from hermeneutic epistemology and methodology.

### COUNTER-HEGEMONIC EPISTEMOLOGIES

At this point, it seems that Marx's and Foucault's epistemologies converge. Their epistemologies are counter-hegemonic. Although coming from different epistemological positions and using different concepts, they assert that the ruling ideas or power/knowledge benefit the ruling/governing class. They agree that the intersection of power and knowledge produces knowledge and truth, which are fundamentally historical and political (Foucault, 1991b; Marx, 1895). Knowledge



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production, including research, is intrinsic to the exercise of power. It is historically specific.

Against this background, Foucault's analytical strategy was to discard the study of individuals altogether in order to avoid the possibility that research could be used for disciplining and governing the subject. Instead, Foucault turned to the archives and studied discourses about a phenomenon and people (Ball, 1990; Foucault, 1979, 1995b). His studies shed new light on why and how we have come to perceive a phenomenon such as discipline or sexuality the way we do at a specific time and place in history. Foucault's main point is that the ruling discourses construct what we hold to be "true" at a specific time and place. This production of truth is an effect of what is included and excluded in the ruling discourses.

Marx's and Foucault's assumptions about the relationships between power and knowledge are great challenges to the human and social sciences and to qualitative research in particular. Under capitalism, the ruling class exploits the working class and other workers, according to Marx. According to Foucault, those in power use power/knowledge to discipline the subject and the population. Foucault argued that state racism is intrinsic to governing (Foucault, 1974). The state introduces regulations and discourses that organize the population in a racialized hierarchy. In its extreme forms, state racism identifies "an enemy within", which is defined as a threat to society and social cohesion (Tomlinson, 2005; Wodak & van Dijk, 2000). This divides the people, who otherwise have common interests in relation to capitalist exploitation and government policies, into competing ethnic groups. The rulers benefit from racism because the people engage in internal ethnic conflicts (Foucault, 1974). These internal conflicts divert the people from collective actions against exploitation and disciplining policies.

Dialectic materialism and post-structural epistemology are counter-epistemologies that transgress the limits set by dominant discourses and class relations within capitalist societies. The epistemologies provide important theoretical frameworks for research on and with youth at the margins. I take these epistemologies, and their ethics and assumptions about power and knowledge, as a point of departure for reflection on how researchers might study the phenomenon of youth at the margins. I suggest that if the purpose is to youth as such, there is a danger that the effect of the knowledge production may reify negative stereotypes and stigma. There is a danger that governments will use knowledge about youth at the margins to discipline the youth, among other potentially unintended or harmful consequences. Responses to recent uprisings among youth in European and American cities illuminate this point.

#### YOUTH UPRISINGS AND RESISTANCE

##### *Power and Knowledge Discipline and Criminalize Youth Resistance*

In recent years, youth uprisings against marginalization and oppression have occurred in cities across Europe and the USA. In Clichy, a suburb in Paris, the

police shot and killed two youth of African descent in 2005. This ignited an uprising during which predominantly poor, non-white youth, who belonged to different minorities, set cars and public buildings on fire in protest against the murders committed by the police officers. Clichy was an impoverished suburb with poor housing, poor education and very high unemployment. The youth protested against the police brutality and racism, and against their marginalized position in education and the labor market. The uprising in Clichy spread to several French cities. The police arrested many youth protesters. In the aftermath, Balibar (2007) showed that the intellectual elite, including researchers, categorized the rioting youth as hooligans that needed to be disciplined. The intellectual elite responded to the uprising by targeting the disadvantaged youth. Similar reactions came after the uprisings among youth at the margins in London in 2012 and Stockholm in 2013.

In August 2014, a white police officer shot and killed Michael Brown, an unarmed African American youth in Ferguson, Missouri in the USA. Public rage and demonstrations followed against the murder and the overwhelmingly white police force and brutality. Demonstrations in Ferguson, with a predominantly non-white population, were initially peaceful but escalated to attacks on public buildings, cars and shops. Some youth engaged in looting. Similar events took place in the uprisings in Paris, London and Stockholm. Poor, non-white youth protested against police harassment, violence, brutality and racism. Youth attacks on public buildings and private property became a pretext for the police to step up the violence against the non-white population, and youth in particular. In Ferguson, the authorities even called in the National Guard to establish "law and order" and discipline the population (Taylor, 2014).

The uprisings in Paris, London, Stockholm and Ferguson show that youth have the will and the strength to resist oppression and marginalization. In Ferguson, the population formulated political demands: "No justice, no peace." Demonstrations were initially peaceful. The demonstrators demanded that the police officer responsible for the killing of Michael Brown should be brought to trial and convicted. Despite the peaceful demonstrations, the police arrested youths in great numbers. They treated the peaceful demonstrators as a social threat and criminalized the youths' resistance. In Paris, London and Stockholm, the youth did not present political demands or strategies against oppression and marginalization in schools or the labor market. This may indicate that the youth lacked tools for articulating political demands and actions.

I propose that youth need access to critical theory and concepts with which to analyze experiences of marginalization and oppression. Youth need to work with and apply critical concepts in analysis of hardships they experience: poverty, racism and marginalization in school and society (Apple, 2003; Freire, 2000; McLaren & Lankshear, 1994). Youth need to engage in processes of conscientization (Freire, 2000). Methodologies that engage students as co-researchers in work with critical theory may provide processes of conscientization. This implies deconstruction of the dominant ideology and policies that discipline and criminalize poor and non-white youth. Youth resistance against poor education, unemployment, racism and police brutality is legitimate. However, the

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uprisings may become counterproductive if the youth destroy their own neighborhood instead of organizing and presenting political demands.

Youth need to explore the class relations they find themselves in and to develop political strategies for redistribution of social and cultural resources (for examples of this see Fessenden in this volume). Ultimately, to work with key concepts within dialectic materialism, critical theory and post-structural epistemology can provide youth with the necessary conceptual tools to challenge and change power relationships in schools and society through organized political work. Such processes are complex and difficult. There is no simple relationship between work with critical theory and political actions for changing social relations. To learn to link critical theory, agency and political action in practice takes time. Students who learn how to improve their own living conditions in school and society may want to pursue such work. My main point here is that youth who get the opportunity to work with critical theory and concepts that transgress the limits that the ruling ideas of the ruling class impose, they can apply such knowledge and skills in struggles for social justice. Without such knowledge and skills, youth resistance may lack direction and fail to improve the situation of youth at the margins.

Against the preceding discussion, I will now address the methodological implications for ethnographic research. I discuss the framing of the research purpose in two case studies of marginalization in schools. I address issues related to categorization and sampling, and then proceed to discuss critical ethnography and participatory action research, which often engages youth as co-researchers. I relate the discussion primarily to educational research.

#### METHODOLOGICAL CONSIDERATIONS

Scholars generally agree that the purpose statement is the most important statement in the entire study (Creswell, 2014). The purpose statement defines the overriding goal of the study. "From it, all other aspects of the research follow..." (Creswell, 2014, p. 123). The purpose statement articulates what the researcher intends to accomplish (Silverman, 2013). This is not to be confused with the research questions. A good purpose statement indicates why the study is worth doing (Denzin & Lincoln, 2000). However, the literature on research methodology does not systematically address epistemology in relation to development of the purpose statement. I argue that this is problematic. Without due consideration of epistemology in relation to methodology, the methods may implicitly come to define the purpose, instead of the other way around. Methodology concerns the philosophical assumptions that inform knowledge claims and research strategies, in contrast to methods that are detailed procedures of data collection, analysis and writing (Creswell, 2014). Epistemology is inscribed in the purpose statement, the theoretical framework, the definition of the research object and the subsequent research design.

Post-structural epistemology and Foucault's discourse theory facilitate studies of marginalization in which discourses are the research object. Discourse analysis is a powerful tool in studies of political, institutional, and professional phenomenon

and practices that contribute to marginalization (Pihl, 2009, 2010a). Such discourse analytical studies avoid objectifying people because the research object is discourse instead of people.

If we turn to ethnography, we encounter challenges in relation to studies of marginalization. A major purpose of ethnography is to interpret and understand people's life world and actions (Denzin & Lincoln, 2000; Silverman, 2013). Ethnography is very influential within the field of educational research. Critics argue that educational studies of youth at the margins often fail to address the intersection of social class, ethnicity and gender (Gilroy, 1982; Ladson-Billings, 2001; Nayak, 2006). Methodological criticism of essentialism draws attention to the complexity of people's experiences, as social class, ethnic background and gender intersect. A person may experience exclusion related to social class in one situation, but may experience exclusion related to color or gender in another situation. Often all of these dimensions interact simultaneously (McCall, 2001, 2005). How this works in real life is an empirical question. Any analysis based solely on class, ethnicity or gender may tie the research participants to one social category, with the danger of essentializing that one dimension. This criticism, which also addresses critical studies within a neo-Marxist tradition, is important.

Against this background, studies of youth at the margins ought to develop a research purpose and design that takes intersectionality into account (McCall, 2001). Then the level of abstraction is essential. The level of abstraction involves ontology, epistemology, social categories, concrete social relations and historicity (Anthias, 2012). If the analysis *remains* at the level of social categories, the study may in fact reify these categories. This is an argument for multilevel analysis in studies of intersectionality (Anthias, 2012).

The initial discussion of epistemology is an argument for the exploration of structural relations that marginalize youth. Such structural relations can even include institutional and professional discourses and practices. Carlile's study (2011) "An Ethnography of Permanent Exclusion from School: Revealing and Untangling the Threads of Institutionalized Racism" is a case in point.

#### *Institutional Racism in School*

In her article, Carlile defines the purpose of her ethnographic study.

This article seeks to investigate evidence of institutional racism experienced by young people who are at risk of being "permanently excluded" (expelled) from schools in an urban area in the South of England. (Carlile, 2011, p. 175)

Expanding on the purpose, she focuses on seeking the elements that reinforce social boundaries, rather than on groups corralled with those boundaries. Carlile interviewed students, parents, school staff and professionals in the local government working with excluded youth. Although she collected data from individuals, the overriding purpose of the study was to explore institutional racism – the causes and effects of permanent exclusion from school on young people and employees. Carlile's theoretical framework is post-structural epistemology

(Foucault, 1979) and Critical Race Theory (Gilborn, 2000): a manifestation of integration of post-structuralism and critical theory.

Carlile identified key elements that contributed to permanent exclusion of non-white students at the school: the dominance of the English language, lack of translations for marginalized students and parents, age assessments that contributed to incorrect placement of students in relation to their age and racial prejudices among the staff. This generated discourses and practices that excluded non-white students. These practices amount to what Carlile defines as institutional racism. Although plenty of conversations at the school celebrated diversity, nothing directly addressed incidents of racism. "Racism seemed to be invisible and inaudible" (Carlile, 2011, p. 191).

Carlile's study highlights institutional, structural and professional practices and discourses that marginalize non-white students. She avoids essentialism and stigma in a study of non-white students at risk of being permanently excluded from school. I attribute Carlile's contributions to her purpose statement, her theoretical framework that integrates critical theory and post-structural epistemology, and her subsequent research design. The design does not objectify the youth – their "culture", "ethnic background" or "race". Carlile's purpose is to investigate the social phenomenon of institutional racism, as opposed to the study of non-white youth as such, who are at risk of permanent exclusion from school. I place Carlile's study within "critical ethnography" (Anderson, 1989).

#### *A Study of "Immigrant" Youth and Their Resistance to the Categorization*

In an interesting article, Solbue explores the challenges she encountered while categorizing her potential informants as "immigrants" (Solbue, 2014). The purpose of Solbue's study was to explore how secondary schools in Norway deal with students from an immigrant background and to analyze the prejudices and processes that contribute to inclusion or exclusion in secondary school. Solbue studied immigrant youth from non-Western countries and their experiences of everyday life in upper secondary school (Solbue, 2014). The implicit assumption was that immigrant youths from non-Western countries were particularly prone to exclusive practices in school. "An immigrant is somebody whose parents are not born in Norway", according to Solbue (Solbue, 2014, p. 822). This is Solbue's account of her sampling process:

... I came into the classroom. There I told them that I wanted to interview the immigrants. In the girls' class this was unfortunate. It would have been better so say that I was doing research on youth in school. The students made a fuss about it and created a distinction between being an immigrant and not being an immigrant. ... It became a classification in the class when I was there. (Solbue, 2014, p. 822)

Solbue categorized the students she wanted to study as immigrants. Consequently, Solbue did not gain the girls' confidence. In the end, only two girls volunteered for

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interviews. These girls were not very informative. Solbue's impression was that they withheld information from her.

I had a strong feeling that I was one of the reasons why the students were making a distinction between being an immigrant and being a Norwegian. ...

The fact that I was a researcher doing a research on *immigrant* girls was stigmatizing the girls. (Solbue, 2014, p. 823)

In Norway, as in many European countries, a strong and negative discourse about immigrants has dominated public discourse for decades (Gullestad, 2002, 2004, 2006; Pihl, 2001, 2009). Thus, the word "immigrant" has become stigmatizing. Solbue's study highlights a general problem within the social sciences – researchers categorize informants. In relation to vulnerable individuals and groups, the categorization constructs them as "the other". This singles them out and excludes them from the community to which they belong, in this case the community of students within the classroom. The immigrant status identifies them as "foreigners".

Solbue's purpose was to develop an analysis and concepts that could contribute to inclusive education in multicultural schools. However, the students immediately adopted the researcher's categorization of them. They drew distinctions between "immigrants" and "Norwegians", thereby excluding some of the students from belonging to the social unit of the class with equal status as Norwegians. This negative effect is in sharp contrast to Solbue's intentions. It illustrates Foucault's point: that a discourse constructs the object of which it speaks. It is the effect of a discourse that matters, not the good intentions of the researcher. Solbue came to understand that her categorization stigmatized the students. Her categorization worked as a form of symbolic violence (Bourdieu & Passeron, 1990). Contrary to her good intentions, the effect of Solbue's design was marginalization of the students. The girls responded with resistance, more or less explicitly.

Solbue applied the Norwegian official definition of immigrant in her study. The Norwegian Census Bureau provides the public definition. According to the bureau, immigrants are persons that have immigrated to Norway and persons that are born in Norway with two immigrant parents that are born abroad and with four grandparents that are born abroad. The Norwegian Census Bureau defines persons born in Norway as immigrants on the basis of ancestry. However, Norwegian-born people have not immigrated. When the bureau defines these Norwegians as immigrants, it is a political definition. The Norwegian Census Bureau turns non-immigrants into immigrants. This public definition constructs the object of which it speaks. The bureau introduces a distinction, which splits the Norwegian population along ethnic lines into two exclusive categories: those born in Norway with Norwegian ancestors are "true Norwegians" – often labelled "ethnic Norwegians". Those born in Norway with foreign ancestors are immigrants. Foucault's concept of state racism is applicable here (Foucault, 1974).

The public definition serves the political purpose of the nation-state in terms of the ethnopolitical organization of the population in Norway. Norwegian public

policy establishes an ethnic hierarchy between different ethnic groups, which have different rights depending on their ascribed social status. Norwegians are at the top of the hierarchy, and they share the cultural, political and social rights entitled to citizens of Norway. In relation to minorities, the state recognizes the indigenous population and the national minorities in accordance with international obligations. The indigenous Sami population and national minorities have political, cultural and educational rights on the basis of their respective status as indigenous people and national minorities (Pihl, 2001, 2010b). However, the state ascribes the immigrant status to all other cultural, linguistic and religious minorities. The government deals with the immigrant population in the immigration policy. Immigration policy is about restriction and control of immigration and the immigrant population (Pihl, 2001).

Solbue's use of the concept "immigrant" activates the restrictive and negative public policies concerning immigrants. The ruling ideas of the ruling class, which are expressed in the National Census Bureau's definition and discourse about immigrants, these ruling ideas and practices enter Solbue's research, even though her research purpose is critical inquiry. This is a typical challenge in relation to research concerning youth at the margins. Public and political definitions are incorporated into research without due consideration. Solbue ascribes immigrant status to her potential informants. For the purpose of her study and sample, this categorization was not necessary or justified. It seems that Solbue uses the public definition of immigrants just because it is a public definition. When Solbue experienced youth resistance against this, she developed a method in which she explored her hidden prejudices in collaboration with a critical friend and research community, and then adjusted her research design (Solbue, 2014).

This study highlights that research concerning youth at the margins can marginalize and even stigmatize the youth. This easily happens if the researcher categorizes and samples "marginalized youth". In order not to marginalize vulnerable youth or groups in the research process, the researcher should use concepts and categories that are research generated. Such research-generated concepts and categories stem from the purpose of the study. This is an alternative to the adoption of politically generated categories and concepts. The rationale for this distinction between academic and political concepts and categories is that the purposes of research and policy are qualitatively different. The purpose of policy is the exercise of power. Political concepts and categories serve that purpose. Research, on the other hand, is about critical investigation of the present and the past, and knowledge development. Policy and research constitute separate social fields. Different discourses and logics dominate within these fields. In research concerning youth at the margins, it is particularly important to uphold the relative autonomy of the academic field and to apply concepts and categories based on counter-hegemonic epistemologies and critical theories.

## SOCIAL JUSTICE: REDISTRIBUTION AND RECOGNITION

I started this chapter by introducing dialectic materialism, which assumes that class relations are constitutive of knowledge and consciousness. Neo-Marxist philosophers have developed this analysis further. In the book "Redistribution or Recognition?" Nancy Fraser engages in a philosophical dialogue with Axel Honneth about social justice, identity politics and cultural recognition (Fraser, 2003). Fraser identifies two recurring problems in epistemology and methodology: reduction of social relations to class relations alone and reduction of cultural diversity to a question of identity politics and cultural recognition alone. Fraser's argument is that the politics of redistribution is commonly equated with class politics, whereas the politics for recognition of diversity is equated with "identity politics" – a policy for cultural recognition of cultural identity of "the other". According to Fraser, an antithesis between redistribution and recognition is false. She argues that the ultimate cause of class injustice is the economic structure of capitalist society. The resulting harm includes maldistribution as well as misrecognition. Fraser's main point is that people who experience social injustice need redistribution of material resources and cultural recognition. "Overcoming class injustice may well require joining a politics of recognition to a politics of redistribution" (Fraser, 2003, p. 438). However, cultural recognition of cultural, religious or linguistic diversity as such does not eliminate social injustice in terms of poverty and marginalization or exclusion from school, work or housing. Fraser introduces a two-dimensional concept of justice.

A two-dimensional conception treats distribution and recognition as distinct perspectives on, and dimensions of, justice. Without reducing either dimension to the other, it encompasses both of them within a broader overarching framework. (Fraser, 2003, p. 449)

In dialogue with Honneth, Fraser argues that recognition usually is taken to mean self-realization. When viewing recognition as a matter of social justice, she treats it as an issue of social status. Misrecognition treats some actors as inferior, excluded or simply invisible. Misrecognition of disadvantaged individuals and groups is expressed in terms of ideology and research. Fraser conceptualizes cultural misrecognition as status subordination and locates the injustice in social relations, as opposed to individual psychology. Fraser's conception of justice entails redistribution of material and cultural resources. Fraser's conception of justice takes into account the tendencies to reductionism within neo-Marxist methodology as well as the tendencies to culturalization within multicultural theory and methodology. People struggling against marginalization and misrecognition should show that the social changes they seek will promote what Fraser calls "participatory parity" – full participation (Fraser, 2003, p. 452). Participatory parity serves to evaluate proposed remedies for injustice. Whether people demand redistribution or recognition, claimants must show that the economic reforms they advocate will supply the objective conditions for full participation. Recognition claimants must show that the socio-cultural institutional changes they seek



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facilitate participatory parity without unjustifiably creating or worsening other disparities (Fraser, 2003, pp. 452-453). This is a status model of recognition, which addresses status subordination and misrecognition. Fraser's conception of social justice is two-dimensional. This conception of social justice takes into account the epistemological critique of culturalization and essentialism.

#### CRITICAL ETHNOGRAPHY AND PARTICIPATORY ACTION RESEARCH

As I see it, critical ethnography puts Fraser's two-dimensional concept of justice to work. Critical ethnography in the field of education has grown out of dissatisfaction with social accounts of human actors in which broad structural constraints such as class, patriarchy and racism never appear. Critical ethnography has also grown out of dissatisfaction with accounts of social structures; class, patriarchy and racism, in which real humans do not appear or figure as social agents (Anderson, 1989, p. 249). Critical ethnography conducts dialectic analysis of structural, material *and* intellectual relationships (ideology/hegemonic discourses) that marginalize or empower people (Anderson, 1989; Carspecken, 1996; Duncan, 2005; Kincheloe et al., 2011). Critical ethnography integrates the sociology of knowledge and critical theory into the theoretical frameworks: critical race theory (Gudmundsson et al., 2013; Ladson-Billings, 2010; Møller, 2013), whiteness theory (Frankenberg, 1994; Leonardo, 2007; Sleeter, 2008b) and feminist epistemology (Alcoff & Potter, 1993; Collins, 2000). Critical ethnography in education is a methodology for empowering students (Freire, 2000).

In recent years, qualifying students as researchers has become important in giving youth a voice and influence in schools and society (Fielding, 2001). Through collaboration with researchers and universities, students in school acquire methods for identifying and analyzing their own situation in schools and society. This is an important methodological response to a crisis of representation; problems associated with researchers "speaking for others" (Alcoff, 1991). Critical analysis, however, requires critical theory. Preparing students as critical co-researchers can provide them with the theoretical and methodological tools for analyzing a problem that the students themselves identify in relation to marginalization or exclusion (Freire, 2000). One of the most pervasive lessons students learn in school is that success or failure is their own individual responsibility (Davies & Bansel, 2007). A nuanced analysis of ideology and power/knowledge within their specific social and historical context may enable working-class and non-white students to challenge hegemonic narratives. Based on their own studies of hegemonic discourses and the history of marginalized groups, they can suggest revisions of the curriculum in school (Camarrota & Romero, 2009, 2011; Hynds, Sleeter, Hindle, Savage, & Meyer, 2011; Kincheloe et al., 2011; Pihl, 2009). Critical ethnography and action research in collaboration with students as co-researchers may allow for exploration of past and present class relations, exploitation, racism and discrimination related to class, ethnic background, gender or ability. It is equally important to engage students in exploration of resistance and class struggles against exploitation, racism and other

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forms of exclusion in school, the local community and society. Such research and practice can potentially engage students as radical agents of change on their own behalf in struggles for social justice.

#### CONCLUDING REMARKS

Research concerning youth at the margins involves careful reflection and planning with respect to epistemology, theory and methodology. Power and knowledge are integral to the research processes. Researchers have the power of definition and exercise power while doing research. Categorization of people implies ascription of belonging to a group. The actual person may not agree with the categorization, especially if the category is associated with social stigma. If we assume that the ruling ideas in every historical epoch are the ideas of the ruling class, critical epistemology, theory and methodology are required to deconstruct these ruling ideas, categories and oppressive practices that go with them.

The previous discussion indicates that research on marginalization has ethical and political dimensions and effects. Researchers wishing to contribute to social justice need to take a reflective, ethical stance in relation to youth struggles at the margins. Studies of youth at the margins hold potential to contribute to either social justice or negative stereotypes and stigma. Whether research contributes to the former or the latter depends on the epistemological foundation of the research, theoretical framework and methodological design. It also depends on the level of analysis; whether the analysis stays at the micro level or is lifted to the meso or macro level.

Dialectic materialism embodies a materialist approach to studies of the relationships between power and knowledge. Foucault's post structural epistemology embodies a materialist dimension with its primary focus on the social effects of discursive practices. Dialectic materialism and Foucault's post-structural epistemology complement each other. From different perspectives, these epistemologies provide concepts that emphasize the material foundation and effects of research, as well as the historical foundation for knowledge production (colonialism and imperialism). Both epistemologies assume that the social effect of a discourse and practice is what matters – not the intent. Power/knowledge is not a linguistic phenomenon only. Power/knowledge has material effects in terms of institutional and professional practices that fundamentally construct and affect the lives of youth at the margins of society. So does ideology.

Marginalization is a social phenomenon. It is historically specific. In capitalist countries, the economic structure and class and cultural hegemony generate marginalization. The history of class struggles and the historical achievements of the working class, women and non-white populations in struggles for social justice constitute a fundamental resource for critical epistemology, theory and research of marginalization.

Critical epistemology and theory are required in studies of, and with, youth at the margins. Such studies should historicize the present. Critical ethnography should address intersectionality. Such studies should raise the level of abstraction above

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the level of categories to the level of social relations and historicity. Defining the purpose of the study at the level of social relations and history as opposed to the micro level may prevent the researcher from essentialist analysis that ties youth at the margins to their social and cultural background, their subordinated category and social status.

The dominant class uses knowledge about youth at the margins to discipline youth. When we, as researchers, design a project, we need to take engage in ethical consideration about the potential effect of our knowledge production on the lives of youth at the margins. Designs that objectify and categorize youth at the margins may reinforce marginalization and stigma. It is equally important to consider and explore the will and ability of youth to struggle for social justice. Youth at the margins can and do resist marginalization and engage in struggles for liberation. This is an under-researched topic. Historical knowledge and awareness about peoples' organized and successful struggles against oppression and marginalization in the past have an empowering potential, in particular for youth at the margins of society.

Critical ethnography and action research can engage youth as co-researchers who speak for themselves and resist the processes of marginalization. Within a context of global capitalism, a two-dimensional conception of social justice implies struggles for redistribution of material and cultural resources that promote participatory parity in education and society. This two-dimensional conception of social justice presupposes international solidarity among marginalized and oppressed individuals and groups. That may encourage youth at the margins to engage in collective social and political struggles for social justice.

#### NOTE

- <sup>1</sup> Joron Pihl is a member of JustEd: Nordic Centre of Excellence Justice through Education in the Nordic Countries. This chapter is a contribution to the work within the centre. <http://blogs.helsinki.fi/just-ed/>

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*Joron Pilh*  
*Department of International Studies and Interpreting*  
*Oslo and Akershus University College of Applied Sciences, Norway*

