

Tulisan ini bermaksud untuk mengelaborasi tiga paradigma besar dalam penelitian kualitatif, yaitu positivisme, interpretif dan teori kritis. Positivisme mempunyai kecenderungan untuk memperlakukan ilmu sosial seperti ilmu eksakta, yaitu dengan mengedepankan obyektivitas, methodological correctness dan asas bebas-nilai. Penelitian sosial, menurut model ini, harus obyektif dan bebas dari bias individu serta didasarkan pada kalkulasi angka-angka. Dengan demikian, harus ada jarak antara peneliti dan yang diteliti. Sementara itu, paradigma interpretif lebih mengedepankan aspek pemahaman terhadap masyarakat yang diteliti. Oleh karena itu, tidak ada jarak antara peneliti dan yang diteliti. Keduanya berbaur dan saling melengkapi. Yang ditekankan model ini adalah bagaimana memahami esensi kehidupan manusia dengan berinteraksi langsung dengan yang diteliti. Paradigma terakhir, teori kritis, hampir sama dengan model interpretif. Hanya saja, paradigma ini tidak hanya berhenti pada aspek memahami, tapi juga bagaimana pemahaman tersebut dijadikan sebagai basis untuk mentransformasikan masyarakat. Dengan demikian, menurut model ini, penelitian harus punya keberpihakan, tidak mungkin bersifat obyektif dan bebas-nilai. Penulis mengajak untuk menggeser kecenderungan model penelitian sosial dari positivisme dan interpretif ke model teori kritis. Sebab, model ini diyakini bisa menjembatani problem etik/etik yang sering terjadi dalam penelitian sosial, di mana penelitian yang dilakukan tidak mempunyai imbas bagi masyarakat yang diteliti, bahkan terkadang tidak jarang hanya sekedar untuk intellectual exercise semata.

Key Words: positivisme, interpretif, teori kritis

The Call For The Paradigm Shift In Qualitative Research From Positivism and Interpretive to Critical Theory

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A. Introduction

There is no single way to put various types of philosophical and theoretical traditions under a certain 'umbrella.' Lincoln and Guba¹ identify four influ-

¹Egon G. Guba and Yvonna S. Lincoln, "Competing Paradigms in Qualitative Re

ential paradigms in qualitative inquiry: positivism, post-positivism, critical theory, and constructivism. Hatch differentiates five major research paradigms: positivist, post-positivist, constructivist, critical theory/feminist, and post-structuralist.² Schwandt distinguishes three theoretical paradigms: interpretivism, hermeneutics, and social constructionism. Carr and Kemmis, Jackson, and Husein divide three major paradigms in qualitative research: positivism, interpretive, and critical theory.³

In this paper, I would like to use Carr and Kemmis, Jackson, and Husein's category for the reason that some theoretical frameworks such as post-positivism, constructivism, hermeneutics, and social constructionism (Lincoln and Guba, Hatch, Schwandt), looking at the goal of research and mode of knowledge could be put under the 'umbrella' of *interpretive* paradigm because they share a major concern, that is, how to *interpret* and *understand* human phenomena. Even in this category we can add other paradigms such as semiotics, phenomenology, ethnography, and symbolic interactionism.

In the discourse of critical theory, there are two views in regard to its content; one refers to the Frankfurt school tradition as can be seen in the work of Rasmussen,⁴ Carr and Kemmis,⁵ and Lakomski,⁶ and on the other hand, there are other scholars who extend the discourse of critical theory to include the Frankfurt school, post-modernism/poststructuralism, and feminism.⁷

search." in Norman K. Denzin and Yvonna S. Lincoln (Eds.), *Handbook of Qualitative Research*. (Thousand Oaks: Sage Publications, 1994).

²J. Amos Hatch, *Doing Qualitative Research in Education Settings* (New York: State University of New York Press, 2002).

³Wilfred Carr and Stephen Kemmis, *Becoming Critical: Education, Knowledge and Action Research*. (Philadelphia: Falmer Press, 1986); Winston Jackson, *Doing Social Research Method*. (Ontario: ST. Francis Xavier University, 1995); and T. Husein, "Research Paradigms in Education". In John P. Keeves (Ed) *Educational Research, Methodology and Measurement: An International Handbook*. (New York: Pergamon Press, 1999).

⁴David M. Rasmussen, *Handbook of Critical Theory*. (Oxford: Blackwell Publishers, 1996).

⁵Wilfred Carr and Stephen Kemmis, *Becoming Critical*.

⁶G. Lakomski, "Critical Theory" in John P. Keeves (Ed), *Educational Research, Methodology and Measurement: An International Handbook*. (New York: Pergamon Press, 1988).

⁷Joe L. Kincheloe, and McLaren, Peter, "Rethinking Critical Theory and Qualitative Research," in Norman K. Denzin and Yvonna S. Lincoln (Eds.) *Handbook of Qualitative Research (Second Edition)*. (London: Sage Publication, Inc., 2000); Henry A. Giroux, *Border Crossings: A Cultural Workers and the Politics of Education*. (New York: Routledge, 1992); and Egon G. Guba and Yvonna S. Lincoln, "Competing Paradigms in Qualitative

In this regard, I do not intend to use 'critical theory' in a narrow perspective only referring to the Frankfurt school, particularly Habermas, but a wider one including post-modernism/poststructuralism and feminism epistemologies. This is because though they have dissimilarities, in terms of orientation they share a common agenda: emancipation of the voiceless.

Discussing a theoretical framework in qualitative research methodology it is important to turn to the work of Thomas Kuhn, *The Structure of Scientific Revolutions*.⁸ However, after being criticized by Masterman who found 21 differences of uses of the term "paradigm" and resulted in the ambiguity of the term,⁹ Kuhn in his second edition (1974) made some revisions from his original theory.¹⁰ In this classic work, Kuhn explains in detail the rise and decline of scientific paradigms. Paradigm is defined as a set of beliefs that guide the researchers to address some important problems or issues under certain a theoretical framework and provide procedures how to solve those problems. A paradigm shift is a process whereby a new way of perceiving the world comes into existence and is accepted by scholars in a given time.

The process of paradigm shift needs two conditions; *first*, the presence of anomalies in 'normal science,' that is, the established thinking, research strategies and methods, in the sense that the existing paradigm cannot explain the prevailing phenomena or even contradict it. The *second* condition is the presence of alternative paradigm that can explain the prevailing phenomena and anomalies that cannot be explained by the previous paradigm. This paradigm transition brings about a scientific revolution where the universe under study is seen in an entirely new light. As a result, previous theories and facts changed through rethinking and re-evaluation.

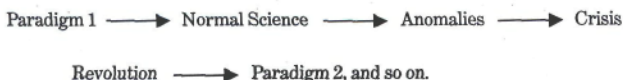
Research."

⁸Thomas Kuhn, *The Structure of Scientific Revolutions*. (Chicago: University of Chicago Press, 1970).

⁹M. Masterman, "The Nature of a Paradigm," in Lakatos I and Musgrave A. (Eds) *Criticism and the Growth of Knowledge*. (London: Cambridge University Press, 1970).

¹⁰J. C. Walker and C.W. Evers, "Research in Education: Epistemological Issues," in John P Keeves (Ed) *Educational Research, Methodology and Measurement: An International Handbook*. (New York: Pergamon Press, 1999).

To sum up, a paradigm shift can be seen in the diagram below:¹¹



Looking at Kuhn's argument, three ideas can be considered: (a) data or observation is theory-laden; (b) theories are paradigm-laden; (c) paradigms are culture-laden.¹² In other words, from Kuhn's perspective there is no "paradigm-free way of looking".¹³

The above model of paradigm shift can be used as a means to analyse the historical moments of theoretical tradition in qualitative research from "traditional", "modernist", to "post-modernist", or from "positivist", "interpretive", to "critical theory". However, a paradigm shift in qualitative research is never taken place in an absolute sense because when certain paradigm came to power and dominate the discourse, it does not mean that the other paradigm will completely collapse.

For example, when today some researchers take seriously the deconstructivist, poststructuralist, post-colonialist, critical theories, and feminist epistemologies, there are still of course some others who use 'positivist' or 'interpretive' paradigms. As Hatch says, "...but it is important to remember that, as the field has evolved, the development of new perspectives and methods has not meant the abandonment of perspectives and methods that came before".¹⁴

In this paper, I would like to call for the shift of paradigm from positivist and interpretive epistemologies to critical theory. Though from a postmodernism perspective there is no single narrative but many and we should give room for plurality and diversity, it is still important to insist on making a

¹¹George Ritzer, *Sociology: A Multiple Paradigm Science*. (Boston: Allyn and Bacon, 1975).

¹²Joyce McCarl Nielsen, *Feminist Research Methods: Exemplary Readings in the Social Sciences*. (Boulder: Westview Press, 1990).

¹³Arthur P Bochner, (2002). "Criteria Against Ourselves" in Norman K. Denzin and Yvonna S. Lincoln (Eds.), *The Qualitative Inquiry Reader*. (Thousand Oaks: Sage Publications, 2002), p. 258.

¹⁴J. Amos Hatch, *Doing Qualitative Research*, p. 5.

choice of epistemology in studying human phenomena by raising a fundamental question: "what is the impact of inquiry being conducted to the improvement of condition of humanity of people being studied?" Such question is really a significant issue to be taken into account by those researchers who concern with making links between a research and an emancipatory project.

In so doing, for the first part I will examine positivist and interpretive paradigms concerning particularly their ontology, epistemology, methodology, and the goal of research. For the next step I will discuss critical theory perspectives on qualitative inquiry. To complete this discussion I will explore the main method of critical theory, that is, participatory action research (PAR).

B. Positivism:

Prediction of Human Behaviour through the Principles of Natural Sciences

Positivist approach has widely and commonly been used in both quantitative and qualitative research. Historically, this approach was used in physical sciences, or as "hard" sciences, and has had a deep emphasis on quantification. Such mode of sciences were eventually adopted by Auguste Comte (1798-1857) and Emile Durkheim (1858-1917) in social sciences. According to both scholars, although the object of the two is quite different (the nature and human phenomena), a positivist model still can be used in understanding human behaviour.

Comte has argued that the development of societies goes through three stages: (a) the theological stage that is dominated by religion; (b) the metaphysical stage that is dominated by abstract speculation; and (c) the positivist stage that is dominated by scientific thinking.¹⁵ These three stages evolved in a hierarchical manner and the third stage is the peak one. The role of social science is to find the laws that govern the shift of each stage.

On the other hand, Durkheim in his landmark work *The Rules of Sociological Method*,¹⁶ attempted to apply methodological principles of physical sciences in the discipline of sociology. He advocated social scientists to use prin-

¹⁵ Auguste Comte, *The Positive Philosophy of Auguste Comte*. (London: K. Paul, Trench, Trubner, 1895).

¹⁶ Emile Durkheim, *The Roles of the Sociological Methods*. (New York: Free Press, 1964).

principles of physical sciences such as treating facts objectively and with a non-biased perspective. The reason is that humans are part of the natural world and since it is orderly, predictable, and knowable, therefore, human behaviour can also be understood through looking at cause-and-effect laws in the natural world. Human behaviour and social actions then are a kind of natural event that occur outside the scope of human consciousness.

This means that Durkheim suggested using a mechanistic view of the world: each outcome is produced by one or more external causes. The basic assumption behind these views is that there is "real" fact that can be apprehended if we apply a rigorous research methodology through separating the researcher and the researched. Only by such methodological correctness can someone gain objective and valid information.

In the positivist's view, science, as defined by Carlo Lastrucci, is "an objective, logical and systematic method of analysis of phenomena, devised to permit the accumulation of reliable knowledge".¹⁷ What he means by "reliable knowledge" is something that is objectively and empirically verifiable. To examine the validity of knowledge or truth there are three criteria to be met: (a) correspondence, that is whether a knowledge statement corresponds to the objective world; (2) coherence, that is referring to the consistency and internal logic of a statement; (3) pragmatic, that is relating the truth of a knowledge statement to its practical consequences.¹⁸

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The aim of an objective approach is to minimize individual bias, which can reduce the quality of a fact. In so doing, the observer and the observed should be seen as independent entities and deductive rules and the technique of statistical analysis must be employed in the research process. By such principles and methods, explanations, and predictions of the future of human behaviour on the basis of present behaviour could gain maximum accuracy.

The focus of this approach is to verify the hypotheses that are often formulated in propositional way in order to be easily converted into precise mathematical formulas expressing a functional relationship. The task of in-

¹⁷ Carlo Lastrucci, *The Scientific Approach: Basic Principles of the Scientific Method*. (Cambridge, Mass: Schenkman Pub. Co., 1967), p. 6.

¹⁸ Steinar Kvale, "The Social Construction of Validity" in Norman K. Denzin and Yvonna S. Lincoln (Eds.), *The Qualitative Inquiry Reader*. (Thousand Oaks: Sage Publications, 2002).

quiry for positivist approach is to prove, not to generate, the hypotheses because the aim of inquiry is to explain, predict, and control human behaviour. Thus, it is clear that the logic of the positivist is the *logic of explanation and* that is typical of the logic of the investigation of nature. Look at what Popper says, "Theories are nets cast to catch what we call 'the world': to rationalize, to explain, and to master it".¹⁹ The knowledge-guiding interests of positivist therefore are mastery and control.

To fully understand the basic assumption and postulate of the positivist paradigm, it is important to use Guba and Lincoln's analysis.²⁰ According to them, three fundamental questions should be addressed by the paradigm of science, namely ontological (what is the nature of reality?), epistemological (what can be known and what is the nature of relationship between the researcher and the researched?), and methodological (how the researcher goes to find the object being studied?) questions.

In term of ontological question, the nature of reality for positivism is naïve realism; a notion that there is "real" reality that can be apprehended and predicted if we apply a rigorous research methodology and a mechanism of cause-effect laws. The "real" fact is an independent entity and subjected to be known and discovered.

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For the epistemological question, positivist argues that world has an order and the task of science is how to reveal the 'truth' of that order as objective as possible. Therefore, this paradigm employs dualist and objectivist mode of relationship. In the sense that the researcher and the object being studied are assumed as independent entities; they are capable of not being influenced by each other. The researcher should keep a distance (detachment) from the object and eliminate values and biases as far as possible in order to elicit impersonal, objective and high quality data.

Dealing with the third question, methodology, positivism used experimental, controlled, and manipulative methods. This is because the questions or hypotheses are stated in propositional forms that are subjected to empirical test to verify them.

¹⁹Karl R. Popper, *The Logic of Scientific Discovery*. (London: Hutchinson & Co., 1959), p. 59.

²⁰Egon G. Guba and Yvonna S. Lincoln, "Competing Paradigms in Qualitative Research", p. 108-109.

To sum up, there are five assumptions of the positivist paradigm.²¹

1. Like the natural world, the social world is knowable through observation and recording.
2. There is an objective reality to be known through separation between the subjective knower and the objective to be known. This is a subject-object separation assumption.
3. Empirical assumption, that is, verification of what is claimed as the social world should be based on the use of the senses.
4. There is order in the social world and social life is patterned and this pattern is dominated by cause-and-effect form.
5. There is a unity of the sciences (including social sciences), they share the same method in examining the social world.

The positivism paradigm that offers reliable, objective, and valid interpretations and puts the object of the study as alien, foreign and strange, has dominated the discourse of qualitative research, particularly from the early of 1900s until World War II. However, today such paradigm is under serious attack among proponents of alternative paradigms and now it is called "conventional" or "traditional."

The positivist approach has been criticized for its attempt to hold value-free research which is considered by proponents of alternative paradigms as unattainable goal because nobody could avoid his/her biases when interpreting phenomena. How can a person prevent his/her bias and expectations while his/her interpretation is based on particular perspectives, worldviews, assumption and point of views that eventually influence his/her interpretation over the object? What is claimed by *value-neutrality* is actually *value* in itself.²²

To use Guba and Lincoln's language, there is always "the theory-ladenness of facts",²³ and thus, theory and facts are not something independent from each other, but are interdependent. The argument is that "real" fact is only fact within certain theoretical framework, or put in another way, there are no facts that are immune from sociological influences. To understand the

²¹ Joyce McCarl Nielsen, *Feminist Research Methods*, p. 4-5.

²² Winston Jackson, *Doing Social Research Method*.

²³ Egon G. Guba and Yvonna S. Lincoln, "Competing Paradigms in Qualitative Research", p. 107.

facts, person should go through certain theoretical "window" and also through certain "value" window.

This paradigm is also suspected of supporting the existing social order in the name of neutrality and non-biased research. Moreover, the positivist approach, because of its use of generalization and randomization concepts, ignores the fact that different people could interpret, perceive, and experience differently the same events, and therefore, general data cannot be applied to individual cases. Human behaviour is quite different from physical objects and it is hardly difficult to understand it without involving meaning and purpose that are excluded by the positivist approach.

The hypothetico-deductive paradigm of positivist has also been called into question by Thomas S. Kuhn.²⁴ He argued that such kind of paradigm that is based on the logic of cause and effect, empirical observations and deductive operations, neither could explain the factual dynamic of scientific revolutions nor reconstruct them rationally.

In addition, the research which is conducted by an investigator may have little or no meaning to the people, group or society being studied and this has raised a problem, what is called by Guba and Lincoln the "etic/emic dilemma".²⁵ It is part of the problem of grand theories and local context.

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C. Interpretive Paradigm:

Understanding Human Behaviour through Interpreting the Lived Experience The interpretive paradigm refers to some theoretical traditions such as constructivism, ethnography, phenomenology, hermeneutics, semiotic, post-positivism, heuristic, ethno-methodology, and symbolic interactionism. To put such theoretical traditions into one "umbrella" of interpretive is very risky and to a certain extent might be simplistic because each of them has its own characteristics. However, some similarities can also be found in those theories, at least they share in common goal of research: interpreting and understanding human phenomena. All these theoretical traditions share a common view in treating human world differently to that of physical world.

²⁴Thomas Kuhn, *The Structure of Scientific Revolutions*.

²⁵Egon G. Guba and Yvonna S. Lincoln, "Competing Paradigms in Qualitative Research", p. 106.

In the ontological realm, the interpretive paradigm views that there is a "real" reality that can be apprehended but imperfectly and relative because what is assumed as 'reality' is only interpretation and a construction of individuals in a particular time and context. The finding of human phenomena in a particular context cannot be generalized or applied to another context. In other words, there is no virtual and objective 'fact' except within certain values and theoretical frameworks. Therefore, the interpretive paradigm is constructed on the basis of *ontological relativity*.²⁶

In terms of epistemology, the interpretive argues that the observer and the observed are neither separated nor independent, but interdependent. Therefore, to get a full picture of lived experience of people being studied, the investigator should immerse and interact intensively with them. Both of them are joined together to generate and construct subjective reality. In other words, reality which is produced under investigation is the result of a 'joint venture' between the signifier and the signified. Not surprisingly, participation observation is the primary method of this theoretical framework. Thus, an interpretive approach evolves transactional/subjectivist relations as opposed to dualist/objectivist of positivism.²⁷

The above epistemology leads this paradigm to develop hermeneutical and dialogical methods. The "Others" are not seen as alien, strange, 'primitive' and 'exotic', as is apparent in the traditional way of thinking of conservative ethnographers ("the outsider"), rather they are seen as a group of people who have their own history and identity that must be heard their "voices." Hermeneutical and dialogical methods are insisted in order to build a relationship that is based on mutual respect and understanding. To put in another way, this paradigm develops a naturalistic method of inquiry.

The above method will be much clear in the study of phenomenology. What is emphasis in this area is finding the very nature of reality of human phenomenon through understanding the lived experienced of people. This is involves how people interpret their world, describe and share their experiences, meanings, values and perspectives and eventually use them as a basis to construct their reality and worldview. The task of researchers is how to hear

²⁶ Ibid.

²⁷ Ibid.

such “voices” and try to understand profoundly what is going on in that particular society. Thus, “phenomenological research is the study of essences”.²⁸ To get such data or essences, besides using people who directly experience (first informants), researchers should also use in-depth interviews because it is impossible to grasp a deep understanding only by questioning basic levels of an interview.

In ethnographic research, there is now what is called autoethnography, that is, “studying one’s own culture and oneself as part of that culture”.²⁹ This new perspective is raised to anticipate if there is no “Other” anymore to be studied and to develop an *inward* looking instead of *outward* looking approach. What is the most important underlying this method is a willingness to be opened-mind, self-critical and to see one’s own culture as simply one of many cultures.

Overall, the interpretive paradigm has a different position from the positivist approach though it still does not replace it. This paradigm has become a legitimate alternative to those who still want to stay in scientific tradition but want to employ the subjective in research.³⁰ The goal of research for the interpretive paradigm then is to *understand* lived experience of people.

D. Critical Theory:

Transforming the Condition of the Humanity of People

Initially critical theory referred to the theoretical tradition developed by the Frankfurt school. However, such category is no longer sufficient to cover a wide range of perspectives associated with this theory. Therefore in qualitative research it refers to three theoretical traditions: the Frankfurt school, postmodernism/post-structuralism and feminism. It is difficult to make a clear cut distinction between poststructuralism and postmodernism. However, it might be useful to employ Agger’s distinction: poststructuralism (Derrida, the French feminists) is a theory of knowledge and language while postmodernism (Foucault, Barthes, Lyotard, Baudrillard) is a theory of soci-

²⁸ Max Van Manen, *Researching Lived Experience* (2nd edition). (Ontario: The Athlouse Press, 1997), p. 10.

²⁹ Michael Quinn Patton, *Qualitative Research and Evaluation Methods*. (Thousand Oaks, Cal.: Sage Publications, 2002), p. 85.

³⁰ Joyce McCarl Nielsen, *Feminist Research Methods*.

ety, culture and history.³¹ Moreover, postmodernism is also different from postmodernity. The former, as already mentioned, is a theory of culture and society; the latter is a civilizational stage.³²

To put these three paradigms into one umbrella does not necessarily mean denying the important differences among them. The Frankfurt school, for instance, which proposes universal reason, rights and autonomy as the foundation for modern social life is completely different from postmodernism's perspective who stands for particularity, plurality and difference.³³ Conversely, the proponents of the Frankfurt school accused postmodernism of being conservative³⁴ and neo-conservative.³⁵

However, instead of putting the extreme positions one after another, perhaps it is more constructive to synthesize their ideas and to elicit the common concerns that they share and such an attempt is not impossible.³⁶ In the case of postmodernism it is important to differentiate this paradigm into apologetic and critical versions, or between "bad" postmodernism and "good" postmodernism.³⁷

Thus, critical theory is blending the perspectives of these paradigms. No doubt, this theory in the field of education becomes a "vigorous and ambitious contender" of positivist and interpretive paradigms.³⁸

It is always problematic to define critical theory since it is not a single concept but many. However, for sure, one primary characteristic of this theoretical framework is that social theory, such as reflected in educational research, should play a significant role in changing the world and improving the

³¹Ben Agger, <http://www.uta.edu/huma/illuminations/agger2.htm>, 2002.

³²Ben Agger, *The Discourse of Domination: From the Frankfurt school to Postmodernism*. (Illinois: Northwestern University Press, 1992).

³³Jean Francois Lyotard, *The Postmodern Condition: A Report on Knowledge*. (Minneapolis: University of Minneapolis Press, 1994).

³⁴F. Jameson, *Postmodernism, or the Cultural logic of late capitalism*. (New Left Rev., 1984).

³⁵Jurgen Habermas, *The Philosophical Discourse of Modernity*. (Cambridge, Mass: MIT Press, 1987).

³⁶Henry A. Giroux, *Border Crossings*.

³⁷Ben Agger, *The Discourse of Domination: From the Frankfurt school to Postmodernism*. (Illinois: Northwestern University Press, 1992), p. 284.

³⁸G. Lakomski, "Critical Theory" in John P. Keeves (Ed) *Educational Research, Methodology and Measurement: An International Handbook*. (New York: Pergamon Press, 1988), p. 54.

condition of humanity.

Kincheloe and McLaren propose some criteria to determine those who are associated with the criticalists.³⁹ According to them, criticalists are those who use their work as a form of social and cultural criticism and accept some basic assumptions:

1. All thought and knowledge are fundamentally mediated by power relations that are socially and historically constructed.
2. Facts cannot be separated from values and ideology.
3. The relationship between theory and object, signifier and signified, is never static, stable or fixed, but dynamic and dialectic.
4. Language is central to the formation of subjectivity.
5. Certain groups in any society are privileged over others and such condition remains stable and unchanged if the oppressed think that it is natural.
6. Mainstream research practices are generally implicated in the reproduction of systems of class, race and gender oppression.

The main concern of this paradigm is about capitalism and how it operates and influences the daily life of people. This theme should be taken into account in the process of inquiry because it creates a false consciousness whereby people are insist on believing that the existing social system is both inevitable and rational. Such a condition is created in such way so that people fail to recognize that the prevailing situation is only part of historical accomplishments and under subject of change. Inevitably, it leads to what is called by theorists of Frankfurt school *domination*, that is, a combination of external exploitation and degradation of internal self-disciplining that enables such external exploitation goes in without reservation.⁴⁰

In a critical theory's perspective, positivism is the most effective new form of capitalist ideology. It generates false consciousness because people are taught to accept the world as it is, without critical thinking. To address this problem critical theorists attempt to develop another mode of consciousness that enables people to perceive that social facts are only pieces of history and can be transformed. Such mode of consciousness is called "dialectical conscious-

³⁹ Joe L. Kincheloe and Peter McLaren, "Rethinking Critical Theory", p. 139-140.

⁴⁰ Ben Agger, *Fast Capitalism: A Critical Theory of Significance*. (Urbana: University Press, 1989).

ness," inspired by Hegelian dialectics. It is mode of consciousness that orients people to look critically at social facts as they appear in reality and attempt to create new social facts so that there no longer exists a kind of domination and discrimination in terms of class, gender and race. In this regard, critical theory attacks positivism in two ways: everyday life and social theories that reduce the social world to patterns of cause and effect.⁴¹

In regard to the theme of domination, it is important to look at Habermas' theory in his *Knowledge and Human Interests*.⁴² He has made a valuable distinction between knowledge gained through self-reflection/communication and causality/technical rationality. He divides three kinds of interest reason where each of them generates a different science. This can be seen from this diagram below:⁴³

Interest	Knowledge	Medium	Science
Technical	Instrumental (Causal explanation)	Work	Empirical-Analytic or Natural Sciences
Practical	Practical (Understanding)	Language	Hermeneutic or Interpretive Sciences
Emancipatory	Emancipatory (Reflection)	Power	Critical Sciences

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The central point of Habermas is his distinction between instrumental rationality and communicative rationality. Instrumental rationality refers to those systems and practices embodied in the various forms of power (state, money and market) that are oriented to stabilize society. Communicative rationality refers to world of common experience and discursive intersubjective interaction, that is, a world constructed by various forms of socialization and mediated by language and oriented toward social integration and consensus.

In Habermas's view, the source of domination and oppression in modern society is due to the domination of instrumental reason in the realm of human

⁴¹ Ben Agger, <http://www.uta.edu/huma/illuminations/agger2.htm>, 2002.

⁴² Jurgen Habermas, *Knowledge and Human Interests*. (Boston: Beacon, 1971).

⁴³ Wilfred Carr and Stephen Kemmis, *Becoming Critical*.

communication and, therefore, he stresses the importance of building a communicative society that is free from domination.⁴⁴ In so doing, it is important to develop communicative rationality that emphasizes the mutual understanding, clarity, consensus and the force of argument. Communicative rationality is built upon an emancipatory knowledge that enables people to think critically on the way they exist in reality.

Habermas accepts the excess of technological rationality that caused for the emergence of the massive growth of technology and the culture industry. Through technology and media, modern capitalism successfully develops what is called by Baudrillard (1983) "world of hyper-reality." What is dominant in such a world is image. Various images are shown in public on a massive scale through technological media of information and telecommunication. Reality is increasingly simulated for people until they cannot distinguish between truth and falsehood, simulations and reality.⁴⁵ No doubt, such manipulation of reality leads to the emergence of false consciousness. The hidden agenda behind such manipulation is no more than gaining a surplus of capital.

Later on, technological rationality produces what Marcuse calls "repressive de-sublimation",⁴⁶ signed by the loss of critical thinking within society. People can only affirm and cannot escape from the external powers such as technological rationality, positivism and the capitalist economic system with its control mechanism.

At this point, modern society becomes "one-dimensional" under the control of impersonal powers.⁴⁷ The spirit of freedom in the age of the Enlightenment has become a thing of legend only. The rationality intended to gain mastery over nature (positivism) produces irrationality useful for domestic human beings and it leads to the degradation of critical thinking, one of the symbols victory of "science" over "mythology" in the period of Enlightenment. Thus, the positivist theory of science has some responsible in producing a new mythology because it fails to understand its investment in the status quo. It is quite understandable if Adorno and Horkheimer say "myth is already enlight-

⁴⁴Jurgen Habermas, *The Philosophical Discourse of Modernity*.

⁴⁵Christopher Norris, *What's Wrong With Postmodernism: Critical theory and the ends of philosophy*. (Baltimore: The Johns Hopkins University Press, 1990).

⁴⁶Herbert Marcuse, *One-Dimensional Man*. (Boston: Beacon, 1964).

⁴⁷Ibid.

enment; and enlightenment reverts to mythology".⁴⁸

In respond to the pessimism of the trend of Enlightenment raised by Adorno and Horkheimer and the rise of postmodernism, Habermas argues that modernity and the Enlightenment is an unfinished project. To reorient such a project into its initial spirit it is necessary to construct a critical social science that enables individuals to understand the distortion of their self-reflection. Critical theory, then, "is not 'critical' simply in the sense of voicing disapproval of contemporary social arrangements, but in the sense that it attempts to distil the historical processes which have caused subjective meanings to become systematically distorted".⁴⁹

Critical theory methodology rejects the separation of knowledge and interest as proposed by positivist because knowledge is always grounded in interest.⁵⁰ Separating knowledge and interest is suspected by the proponents of this theory as a way to reproduce status quo because it encourages conforming social reality. Similarly, this theory opposes the value-free of science, arguing that such stance is susceptible to mystification⁵¹ and very problematic because what is claimed as value-free is itself value and stance.

In addition, unlike positivism that tends to be reductionist by the use of deductive rules and the technique of statistical analysis, postmodernism offers the opposite way. This paradigm is antireductionist and offers plurality in understanding the world. Lyotard, in his *The Postmodern Condition: A Report on Knowledge*,⁵² refuses what he called as *meta-narrative*, that is, single method and explanation that universally can be used to explain all kinds of phenomena. In his view, certain interpretations in certain situations only represent particular context, and consequently, he refuses the project of universal reason of Enlightenment and views it only as particularistic posture of Eurocentric rationality. Such view is consistently in line with the spirit of postmodernism to offer multiple narratives and perspectives in examining social world.

⁴⁸ Max Horkheimer and Theodor W. Adorno, *Dialectic of Enlightenment*. (New York: Continuum, 1972), p. xvi.

⁴⁹ Wilfred Carr and Stephen Kemmis, *Becoming Critical*, p. 137.

⁵⁰ Jurgen Habermas, *Knowledge and Human Interests*.

⁵¹ Max Horkheimer and Theodor W. Adorno, *Dialectic of Enlightenment*.

⁵² Jean Francois Lyotard, *The Postmodern Condition*.

Critical theory has different points of view in terms of ontology, epistemology and methodology from positivist and interpretive paradigms. What is the nature of reality? For this paradigm, virtual reality is always shaped by social, historical, political, cultural, economic, ethnic and gender factors, and over time it is crystallized into structures.⁵³ Thus, there is no "real" reality in genuine sense, immune from "outsider" influences, it is always shaped by historical processes whereby many factors compete each other to influence their ideology and values and eventually the dominant factor will become the winner. Thus, from ontological perspective of critical theory paradigm, the nature of reality is *historical realism*.

In terms of epistemology, critical theory argues that the relation between investigator and investigated is not like *person who knows everything to person who knows nothing*, like the dualist/objectivist relation in the positivist's view, rather it is built upon a transactional involving values and perspectives. Both researcher and the researched are interactively linked and influence each other and therefore, facts cannot be separated from value. In other words, findings are always *value mediated* and *value-ladenness*. It is almost impossible for the researchers to ignore their bias and expectations when doing research because research itself is guided by particular paradigm that open "the door" for them to in.

The above epistemology drives critical theory to develop *dialogic* and *dialectical* methods of research because mutual understanding and developing critical consciousness⁵⁴ cannot be realized except by such ways.

In terms of revealing the meaning of text, Derrida offers a deconstruction method.⁵⁵ In this method of analysis, the meaning of "text" (human behaviour, for instance) on the surface level cannot be understood except by simultaneously understanding its concealments of meaning. Thus, the meanings in "surface" and "concealment" levels should be revealed simultaneously in understanding the "text." However, since the meaning of "text" is never stable, there are always gaps of meaning amongst readers and it resulted in the rela-

⁵³Egon G. Guba and Yvonna S. Lincoln, "Competing Paradigms in Qualitative Research"

⁵⁴Paulo Freire, *Pedagogy of the Oppressed*. (New York: Herder & Herder, 1970).

⁵⁵Jacques Derrida, *Of Grammatology*. (Baltimore: John Hopkins University Press, 1976).

tivism of findings. This notion is obviously in opposed to the logic of positivists who view that "text" or language has stable meaning.

The deconstruction method developed by post-structuralist's point of view helps the reader to see the hidden values and interests of science. It opens up the text and invites the outsiders to join or challenge it with their own assumptions, perspectives and values. No matter how reflexive their assumptions, perspectives and values and how rigorous their methodology they still cannot attain the absolute truth because "every deconstruction can be deconstructed" in the sense that every finding can be replaced by other finding.⁵⁶ But, for sure, whatever their involvement and investment in interpreting the text they contribute in revealing the overall meaning of it.

Unlike positivists who argue that valid data could be gained through methodological correctness or the application of a rigorous research methodology, that is, a commitment to the established rules for conducting research, the proponents of critical paradigm more stress on "what" and "substance" of inquiry. That is why critical theory prefers to use the word "trustworthiness" instead of "internal" or "external" validity.

For the above purpose, instead of proposing *internal* (coherence) and *external* (isomorphism) validity by assuming that true knowledge is a mirror of reality, critical theory proposes *catalytic* validity. The validity of research is not when it is objective, non-biased and in correspondence of the map with reality being mapped, but when it is "catalytic" that strives to ensure research leads to action and has power to transform the participants being studied into better condition. From feminist perspective, "catalytic validity represents the degree to which the research reorients, focuses and energizes participants toward knowing reality in order to transform it, a process Freire (1973) terms conscientization".⁵⁷ This posture implies a commitment to a moral ethic of research.

However, from the postmodernist point of view, the issues of validity, reliability and generalization are seen as leftovers from positivist's perspective on correspondence theory of truth. Therefore it is rejected because it "in-

⁵⁶ Ben Agger, <http://www.uta.edu/huma/illuminations/agger2.htm>, p. 7.

⁵⁷ Patti Lather, *Research as Praxis*. Harvard Educational Review, Vol. 56, No. 3, 1986, p. 272.

dicates a firm boundary line between truth and non-truth"⁵⁸ that is obviously in contrast to the spirit of postmodernism which stands for multiple ways of knowing and multiple truths. What is claimed as 'true' knowledge actually is no more than social and linguistic construction and thus relative.

In relation to the problem of *objectivism* and *relativism* of knowledge, Bernstein in his *Beyond Objectivity and Relativism*⁵⁹ offers a middle position under the perspective of the hermeneutical tradition. He proposes for a dialogue conception of truth in which people participate in a discourse by the use of a rational and forced argument mediated by language. That is the way how true knowledge is sought.

The problem with Bernstein's idea is how such a dialogue could be conducted? Who are the participants of the dialogue? Such questions are important to be taken into account since dialogue from a post-colonial perspective always involve some kind of imbalance of power, wealth and privilege among the participants. Supposed if there is no consensus among participants, the meaning of truth eventually will be given to the participants and thus return to relativist once again.

It is clear from the above perspective that research, for the proponents of critical theory, is not value-free or immune from any bias because "interest-free knowledge is logically impossible" and hence "we should feel free to substitute explicit interests for implicit ones". In other words, since there is no neutral research, it should impose some kind of moral or value's commitment. Critical theory develops a partisan research instead of neutral one and that is why critical researchers enter into investigation with their assumptions on the table and not with a "blank cheque." Research, therefore, becomes a transformative endeavour to connect social inquiry with developing human consciousness. "The project of critical research is not simply the empirical re-presentation of the world but the transgressive task of posing the research itself as a set of ideological practices".⁶⁰

The most remarkable different of this theory over the others is its *praxis-oriented*, means "activities that combat dominance and move toward self-or-

⁵⁸Steinar Kvale, "The Social Construction of Validity," p. 302.

⁵⁹R. J. Bernstein, *Beyond Objectivism and Relativism: Science, Hermeneutics and Praxis*. (Philadelphia: University of Pennsylvania Press, 1983).

⁶⁰Joe L. Kincheloe and Peter McLaren, "Rethinking Critical Theory", p. 144.

ganization and that push toward thoroughgoing change in the practices of.....the social formation".⁶¹ It is a strong belief that when theory allied with praxis it leads to produce a proper political end, namely, social transformation. The goals of research, therefore, is neither to predict human phenomena, as proposed by the positivist paradigm, nor as merely to understand human phenomena, as proposed by the interpretive epistemology, rather it is oriented to critique, emancipate and improve the condition of humanity. Thus, research should have a kind of "transformative agenda."

Making the link between research and the improvement of people being studied is also one of possible ways to solve the problem of etic/emic dilemma; a dilemma of the relationship between grand narrative and local context, or "outsider" and "insider".⁶² In the sense that research sometimes has no meaning to the people being studied, it is just a kind of intellectual exercise of the researcher.

For the above reason, to use Habermas' trichotomic mentioned above, it is worthwhile to reorient the goal of research and to move beyond categories of *predicting* and *controlling* (positivist) and *understanding* (interpretive) to *emancipation* and *changing* human condition in order to achieve a just society. Thus, action research is not merely understanding social life-world as interpretive did but how such understanding is used as basis for transforming the social world.⁶³

Qualitative research would be called "critical" if it departs from and questions the dominant ideology, that is, a system of capitalism that has a profound impact on everyday life of people. Capitalism has created new types of domination and hegemony through local cultures.⁶⁴ That is why the themes of domination, exploitation, hegemony, class and gender should be raised in the process of inquiry. For this purpose, it is important to consider *Participatory Action Research* as the main method of critical inquiry.

⁶¹ J. K. Benson, "A Dialectical Method for the Study of Organization" in G. Morgan (Ed.) *Beyond Method: Strategies for Social Research*. (Beverly Hills, CA: Sage, 1983), p. 338.

⁶² Harry F. Wolcott, *Ethnography: A Way of Seeing*. (Walnut Creek: Altamira Press, 1999).

⁶³ Wilfred Carr and Stephen Kemmis, *Becoming Critical*. and Joyce McCarl Nielsen, *Feminist Research Methods*.

⁶⁴ Steven Jordan, "Critical Ethnography and Educational Research" in *Course pack of Qualitative Research Methods*, 2002: pp. 189-212.

E. Primarily Method of Critical Theory: *Participatory Action Research* (PAR)

The primarily method of critical qualitative research is participatory action research (PAR). It is "a means of putting research capabilities in the hands of the deprived and disenfranchised people so that they can transform their lives for themselves".⁶⁵ Hall, as quoted by Hagey, proposes several criteria of PAR:⁶⁶

1. The "problem" originates within the community or workplace itself.
2. The research goal is to fundamentally improve the lives of those involved, through structural transformation.
3. The people in the community or workplace are involved in controlling the entire research process.
4. The focus of PAR is on oppressed groups whose issues include inaccessibility, colonization, marginalization, exploitation, racism, sexism, cultural disaffection, etc.
5. Participatory research plays a role in enabling by strengthening people's awareness of their own capabilities.
6. The people themselves are researchers, as are those involved who have specialized research training.
7. The researchers with specialized training may be outsiders to the community, but are committed learners in a process that leads to militancy (fighting for change) rather than detachment.

Looking at these criteria, PAR has much similarities with *Action Research*, particularly in involving people in the process of research, seeing that research is political process and as a means to improve the condition of humanity.⁶⁷

⁶⁵P. Park, "What is Participatory Research? A Theoretical and Methodological Perspective" in Park P, Brydon-Miller M, Hall B, Jackson T (Eds.) *Voices of Change: Participatory Research in the United States and Canada*. (Toronto: Ontario Institute for Studies in Education, 1993), p. 1.

⁶⁶Rebecca S. Hagey, "The Use and Abuse of Participatory Action Research" in *Chronic Diseases in Canada*, 18, 1997: 1-4.

⁶⁷S. Kemmis, "Action Research" in John P Keeves (Ed) *Educational Research, Methodology and Measurement: An International Handbook*. (New York: Pergamon Press, 1999): pp. 150-160.

Furthermore, Hagey explains some important concepts in relation to PAR. *Demystification* is the first concept, that is, a concept that tries to disclosure and to unmask the hidden of alienating and oppressive features of culture. In Freire's view,⁶⁸ the process of mystification is made by imposing false, superficial and naïve interpretation and it is the most obstacle to develop critical consciousness. Therefore, demystification, as a means to reveal hidden oppressive of culture, should be imposed so that people critically understand their situation.

The next important concept related to PAR is *hegemony*, formulated by Antonio Gramsci.⁶⁹ This concept refers to a kind of unconscious submission of people toward their "oppressor" who dominate them. In the period of prewar Italy, the regime of fascism successfully employed this concept so that people who are under their domination and exploitation did not question their situation and even wanted to cooperate with the existing regime. The hegemony concept is very important in PAR because the key element to begin with the empowerment of people is how to make them aware of their contribution toward oppression. Without such awareness, it is difficult to empower the deprived and oppressed.

Related to developing critical awareness is the concept of *reflexivity*. This is a concept to clarify and analyze the power relations in constructing reality. Foucault advocates that knowledge is power and discourse is the means of negotiating knowledge/power.⁷⁰ All knowledge has and is mediated by power relations that are socially and historically constructed.

The above key concepts of PAR I think can be added to the notion of *empowerment* because the whole idea of PAR is how to make people think and act critically by strengthening their capabilities of their awareness. This concept becomes a central point of Freire's thought⁷¹ and it is a consequence of liberatory learning and emancipatory action research. Power is not given, but created within the marginalized people through praxis, that is, a combination between theory and practice, or a cycle of action—reflection—action.

⁶⁸ Paulo Freire, *Cultural Action for Freedom*. (Harmondsworth: Penguin, 1972).

⁶⁹ Antonio Gramsci, *Selections from the prison notebooks*. (New York: International Publishers, 1971).

⁷⁰ Michael Foucault, *Power/Knowledge*. (New York: Pantheon, 1980).

⁷¹ Paulo Freire, *Cultural Action for Freedom*.

F. Conclusion

I have shown the competing paradigms within qualitative research methods and to recall the differences among positivist, interpretive and critical theory it is noteworthy to see diagram below:

CRITERION	POSITIVISM	INTERPRETIVE	CRITICAL THEORY
		(Hermeneutic, Semiotics, Phenomenology, Constructivism, Post-Positivism, Ethnography, Heuristic, Symbolic Interaction)	(Frankfurt School, Post-Modernism/Poststructuralism, Feminism)
1. Ontology (What is the nature of reality?)	Naive Realism (There is "real" reality that can be apprehended through "correctness methods")	Critical Realism (There is real "reality" and can be apprehended but imperfectly and relative)	Historical Realism (Reality is shaped by competing social, cultural, economic, political, ethnic and gender values)
2. Epistemology (What is the relationship between the researcher and the researched?)	Dualist/Objectivist (Detachment)	Transactional/Subjectivist	Transactional/Subjectivist (Value and language mediated findings)
3. Methodology	Experimental; Verification of hypotheses; Chiefly quantitative methods	Hermeneutical/Dialogical (Immersion)	Dialogical/Dialectical (Immersion)
4. Role of value in research	Research should be value-free in order to minimize bias and to gain objectivity	Research should and cannot be value-free because what is called "value-free" is itself a value	Research should impose moral and values in order to achieve a just society
5. Goal of research	To predict, master and control object being studied	To understand human phenomena and the lived experience of people	To emancipate, transform and improve the condition of humanity of people being studied
6. The relation between theory and facts	Independent	Interdependent (The theory-ladenness of facts)	Interdependent (The theory/values-ladenness of facts)
7. Knowledge-guiding interests	Instrumental	Practical	Emancipatory
8. Model of apprehension	Causal explanation	Understanding	Reflection
9. Research orientation	Control-oriented	'Normative'-oriented	Praxis-oriented
10. Research agenda	Mastery	Comprehension	Transformative
11. Political affiliation	Right/Conservative	Moderate	Left/Progressive

In contrast to Guba and Lincoln who propose for the paradigm shift from *positivist*, *post-positivist* and *critical theory* to *constructivist* (or *interpretive*),⁷² I call for a paradigm shift from *positivist* and *interpretive* to *critical*

⁷²Egon G. Guba and Yvonna S. Lincoln, "Competing Paradigms in Qualitative Research"

theory. The main reason is that qualitative inquiry should have transformative agenda in order to be meaningful toward the people being investigated. In a contemporary situation where capitalism has entered and influenced the everyday life experiences of people it is a requirement for qualitative inquiry to address such a problem. In other words, the theme of exploitation, hegemony and social injustice as a result of the domination of capitalism should be kept alive in social inquiry.

By raising concepts such as demystification, hegemony, reflexivity and empowerment as main topics of PAR, critical researchers enter into the realm of society with a special political agenda: transforming social reality into a better one by creating critical awareness the people under investigation. Thus, the process of social transformation is not conducted in "top-down" way but "bottom up" by involving indigenous people in the process of research. They are not the "object" of research but the "subject" of research. There is no dichotomy in the process of research, both researchers and people being investigated join together and influence each other to construct and transform reality. Transformation of human beings into better conditions then is the main agenda of critical qualitative research. This then is what is called by Agger "*lifeworld-grounded critical theory*".⁷⁸

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