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Contributions from the Ethico-Onto-Epistemological Perspective for Research in the Field of Education Policy¹

Jefferson Mainardes

Universidade Estadual de Ponta Grossa

Brazil

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Abstract: This paper explores the concept of ethico-onto-epistemology and its contributions to education policy research. Specifically, it seeks to define onto-epistemology and ethical-onto-epistemology, with special reference to Anna Stetsenko's work. The main arguments developed are as follows: a) ethics is one of the structuring elements of research (and not a mere appendix); b) all research involves ethical issues; c) the ethico-onto-epistemological perspective can contribute to the development of more integrated and coherent research; and d) the transformative activist stance contributes to achieving the social purpose of the research and the researcher's work.

Keywords: ethico-onto-epistemology; transformative activist stance; education policy

Contribuições da perspectiva ético-ontoepestemológica para a pesquisa do campo da política educacional

Resumo: Este artigo explora o conceito de ético-ontoepestemologia e suas contribuições para as pesquisas do campo da Política Educacional. Para tanto, busca-se definir ontoepestemologia

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e ético-ontoepistemologia, com especial referência às formulações de Anna Stetsenko. Os principais argumentos desenvolvidos são os seguintes: a) a ética é um dos elementos estruturantes da pesquisa (e não um mero apêndice); b) todas as pesquisas envolvem questões éticas; c) a perspectiva ético-ontoepistemológica pode contribuir para o desenvolvimento de pesquisas mais integradas e coerentes; e d) o posicionamento ativista transformador contribui para atingir a finalidade social da pesquisa e do trabalho do pesquisador.

Palavras-chave: ético-ontoepistemologia; posicionamento ativista transformador; política educacional

Contribuciones de la perspectiva ético-ontoepistemológica a la investigación del campo de la política educativa

Resumen: Este artículo explora el concepto de ética-onto-epistemología y sus contribuciones a la investigación en Políticas Educativas. Para ello, se busca definir onto-epistemología y ética-onto-epistemología, con especial referencia a las formulaciones de Anna Stetsenko. Los principales argumentos desarrollados son los siguientes: a) la ética es uno de los elementos estructurantes de la investigación (y no un mero apéndice); b) todas las investigaciones involucran cuestiones éticas; c) la perspectiva ético-ontoepistemológica puede contribuir al desarrollo de investigaciones más integradas y coherentes; y d) la postura activista transformadora contribuye a lograr la finalidad social de la investigación y del trabajo del investigador.

Palabras-clave: ético-ontoepistemología; posicionamiento activista transformador; política educativa

Contributions from the Ethico-Onto-Epistemological Perspective for Research in the Field of Education Policy

The purpose of this paper is to explore the concept of ethico-onto-epistemology and its contributions to research in the field of educational policy, from Anna Stetsenko's proposition (Stetsenko, 2019, 2021a, among other works). It is a paper of a theoretical nature that aims to raise questions instead of bringing rigid answers or closed categories.

Interest in the study and debate of epistemological issues of research in education policy is the central focus of the *Red Latinoamericana de Estudios Teóricos y Epistemológicos en Política Educativa* (ReLePe)², created in 2012. ReLePe's initial concern referred to the need to mobilize efforts to understand how the theoretical-epistemological references were being employed by the researchers in the field of education policy, as well as to elaborate theorizations that could contribute to the research of this field. Some of the main theorizations elaborated under the scope of ReLePe were as follows: a) the elements of the Epistemologies of Education Policy Approach (EEPA): epistemological perspective, epistemological positioning, epistemological approach (Tello, 2012; Tello & Mainardes, 2015a); b) reflections on the objects of study of education policy (Tello, 2015); c) levels of approach/abstraction: description, analysis and comprehension (Mainardes & Tello, 2016); d) discussions about epistemological pluralism (Mainardes, 2018; Tello & Mainardes, 2015b); e) proposal of the meta-research in the field of education policy (Mainardes, 2021; Tello & Mainardes, 2015a, 2015b); e) productions on education policy teaching and researchers' training for

² More information at www.relepe.org

this field (Flach & Masson, 2014; Gorostiaga, 2017; Mainardes & Stremel, 2019; Pires, 2021; Rosa & Trojan, 2019; Stremel & Mainardes, 2015).

Such formulations have contributed to the theoretical development of the field of education policy in Brazil and Latin America³. Particularly, the EEPA elements stimulate more in-depth reflection on the theoretical-epistemological foundations of research, highlighting the importance of the role of theory in education policy studies, coherence between the three elements (epistemological perspective, epistemological positioning and epistemological approach), the need for permanent epistemological surveillance and reflexivity, as well as the incessant search for improving the quality of the research of this field. Over time, we realized that epistemological studies of education policy needed to be expanded in order to incorporate ontological and ethical assumptions. The deepening of these issues required the investigation and study of texts on onto-epistemology and ethico-onto-epistemology.

Definition of Ethico-Onto-Epistemology

Before defining ethico-onto-epistemology, it is important to present a brief contextualization of the term “onto-epistemology”. This term has been employed to designate the interrelation between ontology and epistemology. Masson (2022) points out that the conceptions of subject/human gender, world/reality (ontology) are intertwined with methodological decisions on how to obtain knowledge (epistemology), denoting a unity between ontology and epistemology. It is, therefore, the organic unity between content and form in the production of knowledge, which can be fragmented, if one of the aspects is prioritized or a theoretical conception is used in an incompatible way with epistemological decisions, which would lead to an inconsistent piece of research from the scientific point of view. The different philosophical perspectives (empiricism, rationalism, idealism, historical-dialectical materialism, positivism, neopositivism, structuralism, poststructuralism, pragmatism and so on) are structured from ontological and epistemological conceptions (Masson, 2022). Thus, the author considers that it is essential that the researchers know the philosophical basis that supports their research, so that it is possible to reflect on the ontological and epistemological foundations that underlie it. The author argues that an onto-epistemology is possible and desirable in the process of knowledge production, because even if the researcher is not fully aware of the ontological and epistemological aspects involved in the production of knowledge, they are present in the development of research, although they are not always presented as an organic unit (Masson, 2022).

The ethico-onto-epistemology neologism was initially coined by the American physics and philosopher Karen Barad (2007) to point to the inseparability of ethics, ontology and epistemology when we are engaged in scientific practice and the production of scientific knowledge⁴. The term has

³ The publication of the e-book *Education Policy Research: Epistemological and Theoretical Issues* (Mainardes & Stremel, 2020) aimed to broaden the reach of these ideas beyond Latin America.

⁴ Barad (2007) proposes “an ethics of the world” that starts from a relational model, situated and embodied with (inter)subjectivity, and which reveals how ethics, being and knowledge can no longer be separated. Inspired by Jacques Derrida, Emmanuel Levinas and the tradition of feminist scientific studies (Donna Haraway), Barad has developed the new feminist materialistic theory of agential realism, which emphasizes the need for a fair and responsible knowledge production and the idea that one cannot fail to get involved ethically with the world. According to the theory of agential realism, the universe comprises phenomena which are the ontological inseparability of intra-action agencies. Intra-action is a neologism introduced by Barad that signals an important challenge for individualistic metaphysics. The central idea is that what we research is intertwined with the “way” we research.

been used more often in the last decade.⁵ Kuby and Zhao (2022) indicate that this neologism, written as a single word, demonstrates that axiology (ethics) cannot be separated from ontology (reality) or epistemology (knowledge). To them, “ethico-onto-epistemology is a philosophical orientation towards how the world comes to be, not a lens that we can apply or take off/put on” (p. 64).

The authors assert that, in general, education researchers focus on knowledge (epistemology) or ethics, but there are rarely explicit discussions about ontology. To Kuby and Zhao (2022), ontology involves considering what is produced in schools and learning spaces, or what the reality(ies) and becoming are. The authors exemplify ontological issues from Kuby and Gutshall Rucker’s (2016) research on literacy. These authors argue that researchers often focus on symbol/sound (phonetic) relationships, grammar and textual genres. However, researchers rarely consider the different types of materials used by children (from pencils and lined paper to software and different digital and artistic tools) that recognize the “liveness of languages, histories, identities, policies, and so forth produce new literacies” (Kuby & Zao, 2022, p. 64). The authors indicate that the focus on ethical, ontological and epistemological aspects lead to questioning: What is literacy? This ontological issue matters because the way researchers conceptualize literacy (and literacies) influence the entire research process (analysis, conclusions and so forth). The authors invite researchers to consider the ethico-onto-epistemological approach in their research and to reflect on the following questions: How does the notion of ethico-onto-epistemology affect research questions? How does this notion affect what actually matters in research? Does ethico-onto-epistemology open new possibilities for research? If so, which ones?

Moon and Blackman (2014) explain that ontology is understood as the “study of being”, which cares about what really exists in the world about which humans can acquire knowledge. Ontology helps researchers recognize how right they may be about the nature and existence of objects they are researching. For example: What “real statements” can a researcher make about reality? Who decides the legitimacy of what is “real”? How do researchers deal with different and conflicting ideas from reality? As epistemology is the “study of knowledge”, it is concerned with all aspects of validity, scope and knowledge acquisition methods, such as: a) what constitutes a statement of knowledge; b) how knowledge can be acquired or produced; and c) how the extension of its transferability can be evaluated. Epistemology is important because it influences how researchers frame their research on their attempts to produce knowledge. Starting from ontology (what exists for people to know) and epistemology (how knowledge is created and what is possible to know) are the philosophical perspectives, a system of widespread visions of the world, which form beliefs that guide action (Moon & Blackman, 2014).

Sánchez Gamboa (2007) proposed, in his “paradigmatic scheme”, that the construction of response (in a research project) involves the technical level, the methodological level, the theoretical level, the epistemological level, the gnosiological assumptions and the ontological assumptions. To the author, ontological assumptions refer to comprehensive and complex categories; the conception of man, education and society; reality conceptions (Sánchez Gamboa, 2007). Gnosiological assumptions refer to the “ways of abstracting, generalizing, conceptualizing, classifying and formalizing, or ways to relate the subject and object” (Sánchez Gamboa, 2007, p. 72). They are criteria for building the scientific object. The epistemological level refers to the “conception of causality, validation of scientific proof and science (scientific criteria)” (Sánchez Gamboa, 2007, p. 72). One of the main contributions of this formulation is that there must be coherence between these levels and assumptions and that the researcher’s worldview (ontological assumptions) is an

⁵ Among the authors who are inspired by Barad (2007), we highlight: Barraclough (2018); Brooks (2019); Davies (2021); Geerts & Carstens (2019); Kuby & Zhao (2022); Lenz Taguchi (2010); Revelles-Benavente (2020); Ribeiro (2019); Song (2020); and Zhao (2021).

essential element in the construction of the object, questions, answers, and epistemological, theoretical and methodological decisions.

From these explanations, the challenge to be confronted by researchers is to integrate ethics, ontology and epistemology, in terms of **content and form**, in other words, to verify that these elements are consistent and articulated in the research. An important starting point is to understand that the theory (or theories) that underlies (underlie) research is articulated with specific epistemological matrices and ontological and ethical perspectives. The ontological perspective involves the researcher's worldview, as well as the explanation of fundamental research concepts. The researcher's clarity about these issues is fundamental so that the onto-epistemological perspectives can be operated with greater lucidity, discernment and coherence.

The importance of the widest possible domain of onto-epistemological issues by researchers has been evidenced in the field of education policy. In a review study of publications on theoretical-epistemological aspects of research in education policy in Brazil, Mainardes et al. (2018) demonstrate that there has been an important theoretical development of the academic field of education policy in the country and an expansion of the number of publications on theoretical-epistemological issues. Some texts, in particular, have highlighted the importance of explaining the theoretical-epistemological perspectives by researchers (Mainardes, 2017, 2018, 2022; Tello, 2012; Tello & Mainardes, 2015a, 2015b), as well as the need to strengthen the training process of researchers for the field of education policy (Gorostiaga, 2017; Mainardes & Stremel, 2019; Pires, 2021), mainly by the study of general epistemology and epistemologies of education policy.

From the concept of ethico-onto-epistemology, we develop the following arguments:

- a) Ethics is one of the **structuring** elements of the research. Thus, ethics should not be considered a mere appendix in the research process and the writing of research reports. In a conventional view, research ethics is restricted to the ethical care to be observed by the researcher and the approval of the research project by a research ethics committee (REC). Ethics is understood as something bureaucratic and compliance with a pre-established norm. From the ethico-onto-epistemological perspective, the ethical dimension is understood as a commitment of the researcher who guides the entire research process, the onto-epistemological decisions, the type of approach, the analyzes and the conclusions, as well as the possible transformative activism that may emerge from the research. The ethical dimension of the research goes far beyond the submission of the research project to a REC.
- b) From the notion of ethico-onto-epistemology, it is possible to state that **all research** involves ethical issues. For example, in a theoretical or bibliographic research, the researcher's ethical dimension is present throughout the research process (problem definition, sources selection, data analysis and interpretation, etc.).
- c) Ethics is present at **all stages** of the research (Brooks et al., 2017). The ethical dimension is present before the elaboration of the research project, permeates the entire research process and extends to the return and possible actions that the researcher develops from the findings.
- d) In terms of theoretical foundation on education policies research (and perhaps in other areas of knowledge), there seems to be "growth" in: theoretical framework, theoretical-epistemological framework, theoretical-epistemological framework, onto-epistemological perspective, ethico-onto-epistemological perspective and ethico-onto-epistemological perspective, the last two being more comprehensive and complex. The inclusion of methodology as a fourth

- element is intended to reinforce the non-neutrality of methodological procedures and that they need to be articulated to the other three dimensions (ethics, ontology and epistemology).
- e) Even if in a conscious way, in the research process, researchers use a set of ethical principles that guides all their actions as researchers.
 - f) Given the centrality that can be conferred into the ethical dimension, it is essential that ethical issues are contemplated in the process of researchers' training.

In this paper, we chose to address the conception of Anna Stetsenko's ethico-onto-epistemology, a Russian researcher in the area of psychology, who works at the City University of New York (CUNY).

Anna Stetsenko's Ethico-Onto-Epistemological Perspective

Stetsenko's ethico-onto-epistemological perspective refers to the unity between being, knowing and doing. At first, the author began writing about sociopolitical and ethical aspects of research as inseparable elements of theoretical-conceptual issues (Stetsenko, 2004, 2005; Stetsenko & Arieviditch, 2004). Then, she began to highlight the notion of the transformative worldview and the activist stance, taking ethics as a central element (Stetsenko, 2008, 2012, 2013). Finally, in the book *The Transformative Mind: Expanding Vygotsky's Approach to Development and Education* (Stetsenko, 2017b) and in other publications, the ethico-onto-epistemology appears as a central theme (Stetsenko, 2015, 2016, 2017a, 2018, 2019, 2020, 2021a, 2021b; Vianna & Stetsenko, 2014)⁶.

To Stetsenko (2019), Marxism, invigorated, rethought and infused with insights of recent studies on feminism, critical pedagogy, critical racial theories and new materialism, among others, can offer a worldview in which political imagination and other phenomena of the human subjectivity find their proper, central and formative place to allow research to advance with activist agendas as a form of resistance. According to the author, the

gist of this approach has to do with the shift away from a profoundly contemplative stance towards an active and indeed activist one, in which knowing, being and doing are subsumed within and made possible by agentive transformative practice aimed at achieving radical ethical goals such as equality and justice. (p. 3)

Thus, Stetsenko's notion of ethico-onto-epistemology is closely related to the concept of transformative activist stance, in which the "ethos of adaptation and political quietism which is dialectically superseded by an ethos of social transformation and philosophical centrality of activism as a struggle for a better future" (Stetsenko, 2019, p. 3).

Stetsenko (2021a) argues that all schools of thought, theoretical structures, forms of research and all acts of being-knowing-doing carry with them—and what is important in them, as their inherently constitutive dimension—specific ethical-political orientations (systems of values and desired final objectives) aimed at and derived from sociopolitically situated projects and, ultimately, always practical in the organization of social life. According to Stetsenko (2021a):

These systems of values and orientations – the sociopolitical *ethos* – indelibly color all other elements and dimensions of knowledge and social existence itself. As such, the sociopolitical ethos is but a part, yet a critically significant one, of the overall *ethico-*

⁶ Personal information provided by Anna Stetsenko on December 16, 2021.

onto-epistemology that can be discerned within any act of knowing, any research program, scholarly tradition, and school of thought. This argument is in line with works that challenge hegemonic canons of science as a value-neutral, objective pursuit of “pure reality,” “objective facts,” “neutral information,” and “naked evidence” purged of all human dimensions and politics – interests, motivations, aspirations, emotions, and sociopolitical agendas. The traditional model of science is presently one of the pillars in the neoliberal agenda and its knowledge economy supporting the overall sociopolitical and economic *status quo*. This is no less than an imperial regime of truth – with particular models of science canonized and reified as a quasi-religious canon. The crude imposition of hegemonic models of science is carried out under the banner of objectivity, validity, and scientific rigor which, it is claimed, allow for science to stay neutral and at a distance from ideology and politics. In fact, however, we are dealing with an ultra-aggressive, starkly ideological pursuit of a misleading and deeply flawed “ideology of no ideology” that is unmistakably political and ideological in its push for compliance with the market-driven interests and managerialist values. These values are exemplified in the proliferation of surveillance and “datafication” of social life, which is rendered calculable and manipulable, as imposed by powerful policy networks (cf. Ward, 2011). (p. 20, emphasis added)

Activist subjectivity and the transformative agency, both oriented to the future and inherently and completely ethical, permeate the onto-epistemology in the light of the complex dialectic implicit in the concept of transformative activist stance (Stetsenko, 2019). To the researcher,

it is impossible to imagine a possible future unless we have located ourselves in the present and its history; however, the reverse is also true in that *we cannot locate ourselves in the present and its history unless we imagine the future and commit to creating it.* (Stetsenko, 2019, p. 9)

Horizons are not presented by others or any authority, but instead they must be “figured out by individuals and communities *themselves*. In this dialectic, the past, present, and future are rendered not only intricately connected but coextensive” (p. 9). Transformative onto-epistemology requires “an elaboration of the dialectic between commitments to the future, guiding activities in the present, including activities of research and theorizing on one hand, and the permanent and ongoing struggle aimed at bringing about these changes in the present” (p. 9). To the author:

At stake is precisely the coming together, the simultaneity of a commitment to the future and the bringing about of this future in every act of knowing-being-doing ‘in the here and now,’ whereby the future is actually always being made and re-made in the present. (p. 9)

According to Stetsenko (2021a):

Science and research are thus not about uncovering what is out there in the world as “it is,” as if somehow separate from our inquiries and practices but rather, about establishing and ascertaining what should and can be made, including via inquiry and research. (p. 26)

In the transformative activist stance, the world is understood as a changeable terrain and in continuous evolution of constantly enacted and reenacted social practices by people acting together

in the performance of their individually unique and authentically authoritative or responsive acts, although they are always deep and too social actions. Thus, reality is conceived as what is being constantly transformed by the people themselves—and not as lonely individuals acting by themselves, but “as *actors* of social community practices” (Stetsenko, 2021a, p. 23).

The transformative activist stance that human development is based on purposeful and responsive contributions—in other words, agentive and activists—to the dynamic and constantly changing world in formation, composed of shared community practices, influenced by visions, positions and commitments with desired specific futures, always ethical-political and non-neutral. According to the researcher:

Human beings come to be themselves and come to know their world and themselves *in the process and as the process* of changing their world (while changing together with it), in the midst of this process and as one of its facets, rather than outside of, or merely in some sort of a connection with it. In this dialectically recursive and dynamically co-constitutive approach, people can be said to realize their development *in the agentive enactment of changes that bring the world, and simultaneously their own lives, including their selves and minds, into reality.* (Stetsenko, 2021a, p. 24)

The transformative activist stance emphasizes that, instead of focusing on the representation of the future as the current one, human action is contingent in individuals when they are committed to a **particular version of the future**. The construction of this desired future is through activities and actions (community practices) in progress (Stetsenko, 2022). The transformative activist stance invites all participants to critically interrogate and go beyond the circumstances presently given, including their own views, in order to imagine the future and conceive the types of collective projects that can turn this future into reality (Vianna & Stetsenko, 2021). The transformative activist stance suggests that researchers and participants never cease to act as collaborative change agents or activists rather than mere observers or interpreters of reality. Research also involves transforming personal engagement into a research tool, bringing ethical dimensions of personal responsibility and vulnerability and making research a “simultaneously personal, political and conceptual effort” (Vianna & Stetsenko, 2021, p. 36).

From Stetsenko’s (2019) perspective, being-knowing-doing as well as to theorize and research should be understood as simultaneously practical-critical projects. Knowledge is an enactment of future contributions oriented to community self-creation practices by creating an incessant and integrated world, and thus is: a) simultaneously a direct and contributing result for community practices; b) intertwining the practical, political and value dimensions of these practices; c) incorporating these practices and their sociopolitical ethos into the very fabric of knowledge; d) implying directionality – that is, an explicit commitment to the way society must be, as an essential and inescapable ingredient; e) going beyond the limits of science as an odyssey of purist thinking, and instead represents a transformative search for radically new forms of social life and knowing-being-doing (Stetsenko, 2019).

To Stetsenko (2013), the transformative activist stance “highlights the notion that individuals *contribute* to collaborative transformative practices (in contradistinction with and a dialectical expansion of the notion of *participation*) through their own unique deeds and their coauthoring of historically unfolding social practices” (p. 15). In that regard,

collaborative practices are posited as ontologically primary, yet they are understood to be continuously and cumulatively evolving through *unique activist contributions* by individual participants, who always act as social subjects, and always matter in one way or another because they are directly implicated in creating their realities of existence and their development, and thus, in social transformations of the world.

This model gives full credit to collaboration and collectivity and, moreover, to solidarity and communion emphasized in emancipatory approaches such as Freire's (e.g., 1990) critical pedagogy, reinstating the initial political message contained in Vygotsky's overall orientation as well (though less pronounced in later works of this research school due to the pressures of the top-down regime which did not assign individuals with any significant role in creating their world). (p. 15)

In summary, Stetsenko's ethical-onto-epistemological perspective:

- a) eliminates the gap between ethical dimension and onto-epistemology, as all forms of research and all acts of being-knowing-doing carry with them specific ethical-political orientations (desired final values and objectives systems);
- b) it proposes that a politically committed and morally engaged scientific study is possible, challenging canonical models of research that advocate that science remains neutral and distant from ideology and politics;
- c) suggests that research and theorizing activities need to be dialectically linked to the permanent and continuous struggle for the realization of changes collectively thought for the future;
- d) proposes the transformative activist stance as a key concept for the effectiveness of the ethico-onto-epistemology; and
- e) emphasizes the ontological primacy of collaborative praxis as a way of life or unique existence of human beings, a fundamental concept to understand the essence of the transforming activist stance.

Contributions from the Ethico-Onto-Epistemological Perspective to the Research of the Field of Education Policy

1st – Internal Coherence in Research and Practical-Critical Knowledge

In a general sense, the ethico-onto-epistemological perspective is a conceptual structure that comprises ethics, ontology and epistemology as inseparable elements. In practice, the implementation of this inseparability puts a significant challenge to the researchers: the search for internal coherence between these elements, either in the research process (research logic) or in the logic of exposure⁷. The search for internal coherence can be achieved by verifying the content-form coherence⁸, the reflexivity and epistemological surveillance, through the researcher's permanent self-criticism and the heterocritics from his peers.

As already mentioned, Stetsenko (2021a, 2022) argues that “all forms of research, and in fact all forms and acts of being-knowing-doing” (Stetsenko, 2021a, p. 20) have a sociopolitical ethos. This sociopolitical ethos is “but a part, yet a critically significant one, of the overall *ethico-ontoepistemology* that can be discerned within any act of knowing, any research program, scholarly tradition, and school of thought” (p. 20). From this we can infer that the researchers, by adopting a

⁷ To Bourdieu (2020), all epistemologists say that the logic of research and the logic of discourse exposure on research are totally different, but the needs of the exhibition logic are so strongly imposed on them that they constitute a type of discourse about research with nothing in common with what it is really done in research (p. 20).

⁸ For a self-analysis of the content-form coherence we suggest that the researchers record in a table the aspects related to ethics, ontology, epistemology and methodology to verify if they are well articulated, that is, if there are strong bonds between content-form in their research. It is also important that this conformatic configuration (content-form) is also debated with other researchers, who can contribute to this evaluation.

certain theory to substantiate their research, must take into account that this theory integrates a certain epistemological matrix and an ontology (more comprehensive and complex categories, conception of men, education, society, reality, as Sánchez Gamboa, 2007 defines). Specific theory, epistemology, ontology, and the researcher have a sociopolitical ethos (desired final goals, guidelines and objectives), a worldview and reality. We argue that the ideal is that there is a convergence between the researcher's sociopolitical ethos and the sociopolitical ethos of theory (or theories) that is adopted as a foundation for their research. In this sense, it is possible to understand that each of the onto-epistemological perspectives is embodied in a way of thinking and understanding reality, modes of philosophizing and a writing style (Peters, 2000).

In the specific case of research in the field of education policy, since the late 1990s, there is research that seeks to evaluate the production of the field of policy and education management (e.g., Azevedo & Aguiar, 2001; Wittmann & Gracindo, 2001). In general, we can observe that the concern of the researchers of this field with the theoretical foundation of research is growing, but there are few of them who include, in their research reports, reflections of an epistemological, onto-epistemological, ethico-onto-epistemological or ethico-onto-epistemological nature (Mainardes, 2017, 2018, 2021; Mainardes et al., 2021; Moreira, 2019; Tonieto & Fávero, 2020).

From the paradigmatic scheme proposed by Sánchez Gamboa (2007), it is observed that few works expose or explore ontological and gnosiological assumptions and the epistemological level (deep epistemology), and the presence of explanations related to theoretical, methodological and technical levels is more common (surface epistemology)⁹. Perhaps, due to the limitations of space for publication, lack of experience in reflection on onto-epistemological foundations¹⁰ or difficulties in assuming theoretical-epistemological positioning, many researchers do not enter theorizations of this nature. There are cases where a certain theoretical-epistemological perspective is made explicit, but it does not always deal satisfactorily with it and, on the contrary, there are researchers who do not spell out its perspective, but they operate with it more coherently and effectively. There are cases where the researchers do not spell out their epistemological positioning¹¹ or it proves to be in sublevel in relation to the contributions offered by the assumed theoretical perspective. There is a strong presence of pluralism as a theoretical-epistemological foundation of research, which can be understood as the attempt to combine distinct epistemological perspectives (combined theorization). Researchers who choose pluralism do not always clarify the role of the theories they deal with and the epistemological matrices to which they are linked. In this context, we argue that the debate around epistemological, onto-epistemological and ethico-onto-epistemological issues emerges as essential for the growing qualification of the research in the field of education policy.

2nd – Ethics in the “Foreground”

The title of this second contribution is based on a formulation developed by Stetsenko (2017b). Ethics, one of the structuring elements of the research, needs to be placed in the foreground. According to the author, bringing the ethical and the political to the foreground is a controversial proposition, subject to contesting. The approach that privileges the act of positioning oneself on issues of sociopolitical and historical-cultural significance is consistent with the

⁹ Regarding the concepts of deep epistemology and surface epistemology, see the interview with Stephen J. Ball (Ball, 2021b).

¹⁰ Anderson and Holloway (2018) use the expression “paradigmatic reflexivity” (p. 4).

¹¹ “Epistemological stance refers to how authors frame what counts as knowledge in light of what they analyze and to what ends (claims, implications)” (Anderson & Holloway, 2018, p. 16). In addition, it can also be understood as the researcher's positioning regarding the investigated research, its context and consequences. Epistemological stance, in coherent research, is articulated with the epistemological stance.

transformative onto-epistemology. In this structure, the questions about “who is talking” and the place from where one is talking, highlighted in recent critical studies (for example, some epistemologies and feminist structures), are expanded to the “for what”. The latter is focused on the purposes and objectives, the destination and approach that schools of thought (including theories and all knowledge construction processes) aim to achieve, when contributing to the future through the imposed changes in the present (Stetsenko, 2017b).

Some questions may be useful for understanding ethics as a structuring element of research: Why am I researching this theme? For what? In favor of whom? From what theoretical foundations? For what kind of future will the answers to questions probably contribute? (Vianna & Stetsenko, 2021, pp. 32-33). What are my commitments to the question investigated and to the subjects involved? What is the social purpose of knowledge being produced? Is it possible to delineate practical implications for the researched context? What strategies could be thought of for confrontation and overcoming the identified problems and limitations? What is the space for transforming activism in this field or on this theme? It is relevant to highlight that the Brazilian philosopher Álvaro Vieira Pinto (1979), in the book “*Ciência e Existência: Problemas Filosóficos da Pesquisa Científica*”¹² [*Science and Existence: Philosophical Problems of Scientific Research*], in 1967, proposed that it is essential to reflect on the purposes of scientific work and that it should be exclusively the service of human purposes, in the full sense of the word (p. 287). The author also writes that the reflection on the essence of scientific work, under the conditions of the underdeveloped country, is necessary for the formation of the consciousness of the researcher and the thinker and the possibility of converting it into an instrument of transforming the existence of the people (p. 339).

From the ethico-onto-epistemological perspective we assume in this paper the research process is based on “interests, motivations, aspirations, emotions and sociopolitical agendas” (Stetsenko, 2021a, p. 21), configuring a “politically committed, morally engaged scholarship” (Stetsenko, 2021a, p. 22).

Based on Scheper-Hughes (1995), Stetsenko (2021a) warns that the idea of a politically committed and morally engaged scientific study “still strikes many as tainted, even frightening” (p. 22). The ethico-onto-epistemological perspective she advocates challenges the hegemonic canons of science the “hegemonic canons of science as a value-neutral, objective pursuit of ‘pure reality,’ ‘objective facts,’ ‘neutral information,’ and ‘naked evidence’ purged of all human dimensions and politics – interests, motivations, aspirations, emotions, and sociopolitical agendas” (p. 21). According to the author:

The traditional model of science is presently one of the pillars in the neoliberal agenda and its knowledge economy supporting the overall sociopolitical and economic status quo. This is no less than an imperial regime of truth – with particular models of science canonized and reified as a quasi-religious canon. The crude imposition of hegemonic models of science is carried out under the banner of objectivity, validity, and scientific rigor which, it is claimed, allow for science to stay neutral and at a distance from ideology and politics. (Stetsenko, 2021a, p. 21)

Research in the field of education policy is very conducive to reflection and ethical positioning, as it involves issues related to social justice, social and educational inequalities, the material consequences of policies for distinct social classes, the right to education, democratization, society projects, national projects, social transformations, etc. In general, the research objects

¹² The book *Ciência e Existência: Problemas Filosóficos da Pesquisa Científica* was written in 1967 in Chile, when the author was in exile. It was published in Brazil in 1969, by the publisher Paz e Terra. The second and third editions were published in 1979, and the fourth, in 1985. In 2020, it was published by Contraponto.

investigated demand the assumption of certain ethical and political positioning. There is a habitus in the field of education policy that encompasses issues such as critical analysis, explanation of political-ideological and ethical positioning, relational analysis, participation in struggle and resistance movements (Pires, 2021; Soares, 2019). For this reason, research in education policy involves a scientific project and a political project (Mainardes, 2018).

The researcher's level of involvement with the theme and the context investigated is distinct from one researcher to another. It is an ethical-onto-epistemological stance that cannot be generalized, and the absence of this involvement and commitment does not mean that the researcher is less ethical. The field of education policy is multi-paradigmatic and the vision of what is an ethical research or stance can be distinct. For example, from some perspectives, such as the poststructuralist and critical Sociology of educational policies, the outline of alternatives or solutions to the researched context should not be a concern of the researcher. On the contrary, from Stetsenko's Marxist perspective, it is essential to assume an activist stance in relation to the issues and problems that are being investigated.

Probably, in both perspectives, there are limitations that must be salutary. What, perhaps, can be widespread is the idea that all researchers, even if not consciously, from the beginning of the research, are based on ethical principles, guidelines and values, on an intrinsic code of ethics. The clarity and awareness of the role of ethics in research can be an important element in the development of research and its developments through the disclosure and, especially, of transforming activism. From this perspective, the ethical reflexivity proposed by Gewirtz (2007) is a highly relevant concept.

3rd - Problematization x Construction of Alternatives in Social Practices

The third contribution refers to the social use of the knowledge produced. From Stetsenko's (2021a) perspective, a researcher in the area of psychology, transformative activism emerges in the research process itself. In the case of research in education, the different forms of activism, in general, occur after the research and throughout the researcher's trajectory, as a "continuous life project" (Stetsenko, 2013, p. 18). The author warns that individuals cannot always be aware of how exactly their activities contribute to the world or may be in a constant search for such activities, struggling to make sense of their lives and find "their way." However,

the lack of awareness and the often continuous struggle to find a meaningful life project (**leading activity**) notwithstanding, people always *do* contribute to something that goes on in the world. This is so even if these contributions are only on a small scale, and even if they are brought about by abstaining from activist contribution to these processes – because the latter type of a 'contribution' often works to perpetuate the existing status quo, to stifle changes in society and, thus, does make a difference too, albeit in the form of a negativity. Therefore, ultimately, what it is that the person is positioned by his or her activities to change in the world and oneself as a part of the world—what objective and what kind of the future a person contributes to—is the pivotal question, the answer to which is necessary in the analysis of human subjectivity that breaks away from, and breaks down, the Cartesian dualism.

The type of onto-epistemology predicated on activist deeds that contribute to social practices and enact the future, means that the direction of our deeds (**unified as one continuous life project**) is central to forming concepts. This direction is formed by goals and commitments to the future enacted through contributions to collaborative projects of social transformation, by the stand we take vis-à-vis the world and the path we chart to achieve our destination. That is, what TAS [Transformative Activist Stance] highlights is the activist, forward-looking stance and therefore, the *future, the*

horizon and the destination of development and personhood. This dimension has been under-theorized by cultural-historical theory where the major focus has been placed on history, and thus, on the past to the exclusion of questions about how the future, conceived in activist terms as a vision to which individuals commit, plays a formative role in development. (Stetsenko, 2022, p. 12-13, emphasis added)

There has been an intense debate in the international literature of the field of education policy regarding the function of research. Some researchers argue that the purpose of research is the problematization and production of critical knowledge (e.g., Ball, 2020, 2021a; Ozga, 2019; Thompson, 2019). For this first group, the role of research is not to build alternatives or engage in actions of change or transformation. In Ozga's (2019) opinion, the "critical" agenda that she and her contemporaries have developed was "the antithesis" of the dominant guidance of "problem solving" for policy studies and represented an explicit "attempt to push back against those powerful trends" (p. 3). Instead of treating policy problems such as self-evident and seeing the work of the policy researcher as mainly focused on policy improvement and solution generation, the author argues that policy sociology was concerned with challenging the wisdom received and asking fundamental questions about institutions and social and power relations.

Based on Gilles Deleuze, for example, Thompson (2019) argues that "the value in theory is in the articulation of questions or problems, rather than solutions" (p. 45), adding that the critique of problems "allows us to better understand the constitution of our condition" (p. 46). Generating solutions, he argues, is circumscribed by the limited relationship with predefined problems, whereas problematization "forces us into an encounter where something new emerges, new thinking, new possibilities, new understanding" (Thompson, 2019, p. 46 as cited in Savage et al., 2022, p. 4). Ball (2021a) questions what he calls "tyranny of alternatives" (p. 391) and proposes the "loss of innocence, a giving up of our role as the heroes of our own story, as revealers of injustice, advocates of radical change and procurers of resistance" (p. 391). In another work, Ball (2020), when dealing with the "errors of redemptive sociology or giving up on hope and despair" (p. 870), he considers that: "Given the limits on thought currently imposed by the assumed goodness of education, there is no space in which education may be thought differently" (p. 876); thus, "critique is blunted and circumscribed by cycles of hope and disappointment – romanticism is cherished and cynicism is abhorred" (p. 876).

Ball (2020) proposes that, "rather than live with and perpetuate consolations of hope and promises of reason, rather than accepting the imperatives of biopolitics, we as sociologists of education might, as Ansgar Allen suggests, begin by admitting the absurdity of education" (p. 877); thus, we must be against education and not in favor of it.

Another group of authors, in turn, values problematization, but suggests that the researcher's role is also to contribute to the context (e.g., Molla, 2021; Savage et al., 2022). In the context of debates on the critical sociology of education policies, Savage et al. (2022) considers that the inevitably political act of research means that it is complicated to see the problematization as a preferable form of criticism of the construction of solutions (p. 5). The authors take into account that the problematization should be seen as an integral part of the critical formulation of solutions for those who choose to engage in such work, and the formulation of solutions should not necessarily be seen as non-critical (Savage et al., 2022). However, the same authors claim that the processes of building solutions are as limited as the acts of problematization and are also capable of producing new possibilities for thinking and understanding the world.

Stetsenko's (2021a) ethico-onto-epistemological perspective is quite clear about this issue, as it comprises the researcher's involvement with the theme and context as a positive element and emphasizes the need for co-construction of transformation processes. With the knowledge built

through study, research, reflection and self-experiences, the researchers may contribute in different ways, such as: explain, in their texts, the implications of their research for more effective educational practices; support the development of alternative projects of teaching networks, schools or groups of teachers; systematize the knowledge produced and alternatives in texts, courses, websites, etc. For example, engaging in a collective project that aims to promote more comprehensive changes or specific areas in a school or school network can be an opportunity to expand the theory-practical relationship and at the same time participate in processes of improvement or transformation of a specific educational context and the research itself. In this sense, the ethical principle present here is that trying to do something, even with limitations, is better than doing nothing. It is important to consider that several private groups offer services and alternatives for public education, and when academic researchers do not get involved with teaching networks and schools, they cease to dispute spaces of “collectividal”¹³ construction of counter-hegemonic discourses.

However, some policies, due to their purposes and characteristics, can hardly be improved. In this case, it is possible to participate in movements that fight for their revocation, as well as attempts to generate forms of resistance. In general, researchers who assume a transformative activist stance in one or more areas of the field of education policy share values such as: social justice, democratization, quality education for all and therefore can easily distinguish which projects could be primarily supported. In summary, the basic ethical principle of this positioning is that the knowledge produced is always theoretical-practical-critical and needs to be put in the service of collective improvement (Pinto, 1979). Involvement with multiple and urgent educational and social demands and with real practices provides the continuing improvement of this same knowledge¹⁴. Through the transformative activist stance, researchers make their explicit “commitment to how society should be, as an essential and ineluctable ingredient; and (...) mov[e] beyond the confines of science as a purist thought odyssey, and instead representing a transformative pursuit of radically new forms of social life and knowing-being-doing” (Stetsenko, 2019, p. 10).

Final Considerations

Despite the existence of a significant set of research and publications on theoretical-epistemological issues in the field of education policy, there are still many aspects to be explored. As Schwandt (2000) explains, the practice of social investigation cannot be properly defined as an a-

¹³ About the concept of “collectividal”, see Stetsenko (2013). This approach outlines the subtle dialectic of the individual and collective plans of human praxis, in which each individual is “**shaped** by collective history and collaborative practices while at the same time shaping and real-izing them through contributing to their collective, dynamic materiality in moving beyond the status quo. In capitalizing on people always transcending what exists in ‘the here and now,’ in a non-adaptive fashion, based in a commitment and vision to how the world “ought to be,” the individual subjectivity is reclaimed as itself a **fully social, embodied, material-discursive process**. Individual subjectivity and agency gain status through contributing to changes in ‘collectividal’ practices as the primary onto-epistemology of a unitary realm that is individual and social/collective at the same time” (p. 7, emphases added).

¹⁴ As an exercise of reflection, we listed 130 specialties of transformative activism in the area of education and education policies (available at <https://doi.org/10.13140/RG.2.2.26853.47849>). Such specialties were elaborated from the observation of forms of social action of education researchers in Brazil, as well as by the nature of published works. From a relational and multidimensional perspective, all forms of transformative activism are important, some being more specific (for example, transformative activism in supporting children and families of children with the Congenital Zika Virus Syndrome) and more comprehensive (for example, transformative activism in the struggle for the right to decent housing).

theoretical doing that requires only methodological dexterity (p. 190). Instead, the connections between paradigms and ways of conducting research needs to be explored.

In this paper, we sought to demonstrate that the ethico-onto-epistemological perspective contributes to the conduct of more integrated and coherent research. In addition, it challenges researchers in reflecting on the social purpose of science and research. As it is a large, multifaceted and multi-paradigmatic field, the debate around conceptual disputes as well as on the foundations and purposes of research should always be intense and as highly positive and productive as it can be. This is why, at the beginning of this paper, we claim that it is a text-proposal for debate and not of absolute truths.

In this text, we argue that ethics is one of the structuring elements of research and not a mere appendix. In addition to being present at all stages of research, ethical issues emerge as fundamental when we admit the transformative activist stance, which requires the researchers to have a distinct understanding of conventional research in relation to their role, engagement and involvement with the theme and with the context being investigated. In this research model, the commitment to social transformation and a future perspective guides not only the research, but also the type of relationship with participants, as any research is always a joint effort between researchers and participants (Vianna & Stetsenko, 2021, p. 36) in building a better future for everyone. The issue of the disclosure of the research results is important, and the debate around the issue needs to be expanded. However, the proposal of the transformative activist stance emerges as an alternative that goes beyond the notion of disclosure. Without organic, collective, continuous and integrated actions, the real contexts will hardly be transformed.

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About the Author

Jefferson Mainardes

Universidade Estadual de Ponta Grossa (Brazil)

jefferson.m@uol.com.br

Master's in education from the *Universidade Estadual de Campinas* (UNICAMP). PhD in education from the Institute of Education - University College London. He has taken a senior internship at the Institute of Education - University College London, with a scholarship from the Coordination for the Improvement of Higher Education Personnel (CAPES). He has been a professor at *Universidade Estadual de Ponta Grossa* since 1990. Research Productivity Scholarship – National Council for Scientific and Technological Development (CNPq). He is editor of the journals *Práxis Educativa* and *Revista de Estudos Teóricos y Epistemológicos en Política Educativa*. He was co-founder Deputy Director of the *Red Latinoamericana de Estudos Teóricos y Epistemológicos em Política Educativa* – ReLePe (2012-2019). He integrates the Research Ethics Committee of the National Association of Research and Graduate Studies on Education (ANPEd) since 2015. He is president of the ANPEd Research Ethics Committee (2020-2023). Member of the Work Group of Ethics in Research of the Human Sciences, Social, Applied Social, Linguistics, Letters and Arts Forum (FCHSSALLA).

ORCID: <https://orcid.org/0000-0003-0401-8112>

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