

Ethnographic research through a liberationist lens

Ethical reflections on fieldwork

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Abstract

The article deals with four research-related ethical questions that stem from the author's experiences in fieldwork. The author employs the liberationist tradition as a sounding board in her reflection. This tradition gives rise to the ethical questions that she deals with, among other influences, and also works as a lens through which she navigates the ethical dilemmas. She argues that such ethical reflection is timely because of the increasing interest in ethnographic methods in theology and theological ethics. The liberationist lens – which is consciously biased in its choice of socially marginalised people and groups as interlocutors and is geared towards just social transformation – offers a useful approach to interrogating fieldwork ethics, also for scholars operating outside of the field of (liberation) theology. Besides the key contribution of the article, that is, reflecting on the relevant ethical questions related to the research, the author suggests that a wider and more systematic usage of ethnographic tools could benefit the liberationist tradition, which indeed emphasises the importance of lived experience, at this point in time, when many of those writing in the liberationist tradition are full-time academics.

Keywords: ethnography, fieldwork, liberation theologies, research ethics

“The condition of truth is to allow the suffering to speak. It doesn't mean that those who suffer have a monopoly on truth, but it means that the condition of truth to emerge must be in tune with those who are undergoing social misery – socially induced forms of suffering.” – Cornel West²

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² West 1993:4, quoted in Farmer 2013b:53.

1. Introduction

Some speak of an ethnographic turn in theology and theological ethics (Scharen and Vigen 2011). Over the past few decades ethnographic methods have become more widely used in this field, even if the interest in lived experience and practice does not always reflect in people doing actual fieldwork (Ward 2012:1-2, see also Scharen and Vigen 2011). Already before the recent methodological turn, liberation theologians had been among those emphasising the importance of lived experience and particular contexts for any theologising (see Fulkerson 2011:xii). The liberationist³ method highlights, on the one hand, critical social analysis and, on the other, the choice of structurally marginalised⁴ people as interlocutors. The condition of truth, to return to the opening quote from Cornel West, then necessitates identifying those who suffer and allowing them a space to speak. To allow someone to speak, in turn, requires the skill to listen, and to do so ethically.⁵

In this article I reflect on research ethics in fieldwork at the intersection where the liberationist method and ethnography meet. The liberationist tradition, that is, the scholarly writing that employs the liberationist method, plays a twofold role in the article: first, my reading of this tradition prompts some of the ethical questions that I deal with in fieldwork; second, I use the liberationist tradition as a lens through which I reflect on these questions and how they could best be navigated. Even if ethnographic methods were not a standard approach among scholars who identify as liberationists, ethnography and the liberationist method are by no means antagonistic or mutually exclusive; my choice of ethnographic methods is inspired first and foremost by what they can offer to a liberationist position. In reverse, the emphasis in the liberationist method on lived experience and social justice from the standpoint of marginalised groups makes it a useful sounding board for ethical reflection on empirical research, also for scholars who do not identify as liberation theologians. Such reflection is timely because of the current popularity

³ I use the attribute 'liberationist' to refer to liberation theologies in general; I use 'liberationist' instead of 'liberation theological' because it is more inclusive of the methods and scholars that strongly draw on liberation theologies but might not strictly identify themselves as liberation theologians. The term 'liberation theological' is also at times linked merely to Latin American liberation theology, so the decision to use 'liberationist' here is also to remind the reader of the broader horizons.

⁴ The term 'marginalised' is problematic as a label because, among other things, it may be interpreted as having a connotation of misery and lack of agency. In this article I, however, choose to use it as a term that points towards an understanding of the world as one where certain groups have more access to privilege and power than others. Hence the addition of 'structurally' is important here, and when I use the term 'marginalised' in this article I understand it in this sense, even if I do not repeat 'structurally' every time from here on.

⁵ From the perspective of power relations, the question whether any skills actually enable this, of course, could be and has been debated (see Spivak 1988).

of ethnographic (broadly understood) methods among theologians as well as other disciplines in the social sciences and humanities.

Liberation theologies are defined by a shared method (see e.g. West 2009, Phan 2000), and thus I begin by briefly introducing how I understand this method. My aim here is not to provide an assessment or critique of the method or liberation theologies, let alone any particular theology within the liberationist school of thought, but rather to give a broad outline of the tenets of this method that are useful in thinking about the ethics in fieldwork. Then I say a few words about the ethnographic turn in theology, with an emphasis on liberation theologies. Together with a brief introduction to my current research design, that is, the key context of my reflection, these sections provide the background for the ethical reflection. I discuss four ethical questions that I have encountered in my work and the insight provided by a liberationist lens in addressing these questions.

2. A biased liberationist lens

The liberationist method, like methods in other critical discourses, is based upon an assumption that neither theology nor knowledge in general is ever neutral but always particular; it is informed and mediated by one's social location and impacted on by the life experiences of the subject (see de la Torre 2014:29-30, Maduro 2009:19-21, Said 2003:10, Holland and Henriot 1983). The bias in liberation theologies is towards different structurally marginalised groups and geared to achieving social justice; the classical formulation of "the preferential option for the poor" while referring to an economic category, also goes beyond that to other, often interlinked, modes of marginalisation (see Gutiérrez and Groody 2014:2, Noble 2013:16, 20). The notion of social justice, as I understand it, refers to equity and the actualisation of respect for human dignity among and between social groups in society (race, class, gender, sexuality, nationality etc.). Theologically the bias is based on a hermeneutics that emphasises prophetic and context-driven readings of the Bible and a critical engagement with power in society but also as embodied in the text (see Noble 2013:16-19, Boesak 2012, West 2003, Mosala 1989, Boesak 1976:16-26).

Social justice, power and privilege are decisive factors in understanding the bias because the world is understood as "a world of conflicts" (Frostin 1988:8), or, in other words, as characterised by inclusion and exclusion (Noble 2013:16). "An option for the poor characterises a sincere commitment to justice, not because the poor are inherently more holy than the elite, but because they lack the elite's power and privilege" (de la Torre 2014:10). Social scientific methods, that is, tools from sociology, anthropology, political science or related fields, are thus used by liberationists in their theological and ethical analysis. The bias and commitment to struggle for justice, moreover, translates to the centrality of the notion of action

and praxis: at least in principle, liberationist theory is always organically linked to action (see Freire 2000, EATWOT 1978).

The bias is reflected in liberationists choosing marginalised people as their interlocutors, or “partners-in-dialogue” (Phan 2000:43), or, in ethnographic terms, as the informants, that is, those who inform us about the world. The preferential option for the marginalised as the interlocutors also translates to an emphasis on experience as a foundational source of theological knowledge, not something that is merely validated up against prior theological ideas (see McGrath 1994:194-199, Hankela 2014a:16-17). The epistemological break that liberationists claimed to make vis-à-vis the then mainstream white Western theology in the 1970s was indeed to begin with listening to people and not to ideas; to engage in dialogue with the poor and not with the learned; to begin with the context and not with philosophical categories (Frostin 1988, EATWOT 1978). Being guided towards seeing what structurally marginalised groups of people see and understanding what they understand is then the basis of action in solidarity.

3. The ethnographic turn and theology

The methodological turn towards practice and the experience of real people that has taken place in theological departments over the past few decades reflects broader developments across other disciplines (Ward 2012:2, 6). Among theologians, however, the term ethnography itself may denote many different things. While anthropologists have classically used ethnography to refer to empirical research that is based on the researcher living for a lengthy period of time with a group of people, the usage of the term by some theologians could “describe anything from a brief historical vignette to a theological case study” (Phillips 2012:102). Using the term may be inclusive of various qualitative methods, “such as shorter-term observation, interviews, [and] analysis of speech patterns appearing in the discourse of the group” (Fiddes 2012:14). Nevertheless, the interest in ethnography reaffirms an old – albeit, one could argue, misrepresented – tradition of referring to experience as a source of theological knowledge. This interest in lived realities has before materialised in, for instance, the liberationist tradition and in the work of practical theologians (Fulkerson 2011:xii).

In my reading of liberation theologies, it appears that the recent ethnographic turn in theology has not had strong representation among liberationists. Many who identify as liberationists, or whose work clearly draws on the liberationist tradition, do not systematically utilise ethnographic (in the broad sense) methods, probably for various valid reasons. The choice of interlocutors is strongly evident in liberationist writing through a social scientific intervention. Whereas critical social analysis – at least a claim to doing such – is probably a common denominator in any writing that claims to be inspired by the liberationist tradition, the role of the

first-hand experience of people who live on the margins of societal power varies in these writings. Some write as members of these communities, be it female, Black or queer. Others serve faith communities in these local communities and, hence, do theological scholarly reflection as close-up witnesses to systemic injustice (see Hankela 2014b:176). Yet others refer to this experience indirectly through social structural analysis, or through anecdotes about the life experiences of such communities that serve as a starting point for a theological or ethical interrogation. Indeed scholars have also raised their concern about liberationists' detachment from the actual struggles of communities (Buffel 2010:477, Althuis-Reid 2006:14).

Lastly, there are those who explicitly use ethnographic methods to listen to the experience of the interlocutors. Ethnographic methods, according to the two examples below, can both be in line with the task of promoting social justice in liberation theologies as well as provide a tool to refine the discourse and its relevance to real people. The first example of current scholarly work that is explicitly inspired by liberation theologies and systematically employs ethnographic methods is the work of the medical anthropologist Paul Farmer on social justice and public health. Farmer's methodological reflections highlight the need for both social analysis and the first-hand experience of real people as a liberationist ideal:

This sort of review is standard in all responsible health planning, but liberation theology would push analysis in two directions: first, to seek the root causes of the problem; second, *to elicit the experiences and views of the poor people* and to incorporate these views into all observations, judgements, and actions. (Farmer 2013b:45, emphasis in the original)

Empirical research that Farmer (2013b:44-52) reports on in relation to tuberculosis in Haiti demonstrates the importance of such eliciting of the experiences and views of marginalised people for life-affirming results in social justice praxis. Another example is the work of the theologian Mary McClintock Fulkerson, who "exemplifies this turn to ethnography in her own professional evolution" (Scharen and Vigen 2011:29). Fulkerson has done ethnographic work in the local church context, but what is important for the discussion here is that she refers to and draws on liberation theology as a context-specific tradition in her explanation of this method in theology (Fulkerson 2012:137, 2011:xii). An emphasis on multiple experiences can refine the liberationist tradition. In *Changing the Subject* (1994) Fulkerson challenges a tendency in feminist theology to generalise the experience of women; listening to particular women's particular experience forms a part of this exercise.⁶

⁶ Also see Vuola 2002, and her critique on the lack of engagement with the particular experience of poor women in Latin American liberation theology of a given era.

In the South African context a combination of the liberationist method and a strong empirical approach is characteristic to the work of some biblical studies scholars at the University of KwaZulu-Natal. The contextual Bible study method is based on “ordinary readers” and “socially engaged biblical scholar[s]” reading texts together in a context-driven fashion (West 2003:x). Also, the praxis cycle model, inspired by, among other things, liberation theologies and used, for instance, by missiologists at Unisa, includes the step of interrogating the “agency” of the researcher and the researched, or self-reflective “insertion” in or “involvement” with the communities that one engages as a scholar (Nel 2014, Kritzinger and Saayman 2011:5, Kritzinger 2002). Identification as a step of the praxis cycle model does not necessitate ethnographic work or the systematic gathering of empirical data, but it does provide a link that could integrate ethnography into a liberationist model for the sake of a closer understanding of the complexity of lived experience (see Hankela 2014a:13-40, 2011).

4. The ‘ethnographic’ context of my research ethical reflection

My ethical reflection in this article does not stem from short-term empirical engagement or observation. Neither do I write in a research context where the relationship between the field and ‘home’ is defined by distance. Many ethnographers, of course, maintain connections to the field after completing their projects, but in many projects one can identify a clear distinction between home and field because of either geographic distance or other reasons; this distinction may be further marked by a clear beginning and end point of fieldwork, and between private life and the sphere of research. My doctoral fieldwork could serve as an example (Hankela 2014a). As a doctoral candidate I spent a year doing fieldwork at a church in Johannesburg, sitting in meetings and services, hanging out in the foyers and the streets around the church, interviewing people. I was involved with people at the church in different roles. Yet I had come there to do research, and I would leave the church and the city to go back ‘home’ to write up the research. The awareness of a defined timespan allowed me to solve certain research-related ethical questions, for instance, those related to money and material exchanges, in a way that would not have been sustainable in a temporally undefined, long-term relationship.

Once I had defended my dissertation, I moved back to South Africa two years after leaving the country and became involved with the same church. Among other things, I continued youth work through this contact. A year and a half after returning to South Africa I started a research project among these very young people and their peers. This is the context of my reflection in this article, marked as it is by a shift from my being a visiting student to living in Johannesburg. While I do not claim to be a ‘full member’ of this community, or to share the social location, my research is

now an aspect of existing, long-term, multi-layered relationships and engagement. It implies the idea of living, more or less permanently, in close physical proximity to where one does research. Anthropologist Erica Bornstein (2007:497) writes that in India, where she also has family ties, “fieldwork immediately became life.” I too would here speak of life or, more particularly, a chosen life that also involves a presence in spaces where these young people live. This life, however, is not fieldwork that consumes most of one’s time, as my doctoral fieldwork did for about a year.

My reflection in this paper is done in the light of this chosen life. The social context and location of the researcher and the participants, of course, further define the relevant ethical questions. Thus a few introductory words on the key relationship through which I reflect on fieldwork ethics are in order here. The young people who participate in this particular research project are black, Zimbabwean men in their twenties, most of whom earn a low and/or irregular income, and I am a white, Finnish, middle-class, thirty-something female. We all live in Johannesburg, but they stay in a township and in the inner city, while I stay in a middle-class suburb. The physical proximity is, in other words, complicated by different layers of distance. This research project started in late 2014, but I first met many of the participants in 2009 during my doctoral fieldwork. Many attended youth group sessions with me in 2009 and/or 2014. For a while in 2013 I volunteered as a facilitator in a community initiative in which some of the young men were volunteers. Prior to starting this research project, I had interacted with some of those who are now research participants mostly in these more formal spaces provided by, for instance, the youth group; with others we had also kept in touch over the years via WhatsApp, email and in person. This research project, with its interviews and focus group sessions, added one new aspect to our relationship.

Next I turn to the four questions related to research ethics. I have chosen the four questions because I constantly think about them in relation to my research practice, and because my thinking, and anxiety, around these issues is to an extent both stimulated and soothed by my reading in liberation theologies.

4.1 First research ethical question: On mandate and systemic boundaries

I conducted my doctoral fieldwork at a Johannesburg church that sheltered thousands of people, the majority of them migrants from Zimbabwe. At the church one was bound to get used to journalists and researchers – who were often, though not at all exclusively, white folks – coming to the church and asking questions. I heard about the sentiment expressed among some at the church that these people came there, took the people’s stories and made money for themselves. Often I did not feel that this sentiment was actually directed towards me who had become a constant presence at the church. However, one day in late 2013, when I returned

to the church some years after my actual intensive fieldwork period, an older man told me: "You should go somewhere where there are white people. You come here because we are black. You make films of us. You think we do not see that. . . . You must go." The man was drunk but I doubt that his sentiments were either unique or prompted by alcohol, which maybe gave him the courage to declare them.

This incident illustrates the core of the first ethical question: What is the mandate of an outside researcher to enter the lives of other people for the purposes of what we want to think of as knowledge production? The man I met reminds me of Linda Tuhiwai Smith's (1999:3) comments on some indigenous people feeling like they are "the most researched people in the world", but also of her writing on such research as not meaning much or doing very little good for the people in question.

Research relationships are embedded in a world of conflicts marked by system-backed privilege and system-created domination. Hence a liberationist emphasis on structural analysis compels me to ask what, if any, is my mandate as a white middle-class academic to do research with people in a black township or predominantly black inner city. Questions about mandate are relevant to any kind of research, but even more so in an ethnographic setup, both because of the questionable aspects of the history of anthropology as well as the concrete inhabiting of the world of real people that ethnography entails. Critical scholars such as Smith (1999) help us to unpack the historical and ideological relations between imperialism, colonialism, missionary history and anthropological research. The Western cultural archive has, moreover, for long formed the main frame of reference against which claims about anything 'other' are made. In the context of a history of domination, engaging real communities in one's research without critical introspection might do little more than reproduce discourses or legitimise stereotypes that are damaging to the groups of people of whom they speak (Smith 1999:35-37, 42-83).

In the spirit of the preferential option, I take this view of the history of academic writing that acknowledges the West-centeredness in academia in general as the starting point. Does it make sense for me to write about the experience of these young people whose social location is very different from mine? Can it be good? How likely is it that I simply end up reproducing harmful ways of naming the reality of the young, black, socioeconomically lower-class, Zimbabwean men in Johannesburg? Listening to Smith and others who argue from similar positions, I have on several occasions contemplated whether it would be better – for the imagined idea that research works for the good of humankind (see Smith 1999:2) – that people like me (middle-class white) would solve the problem of mandate in research settings like mine by retreating from writing on the experience of people who continue to suffer from the historical injustices that have built the wealth, archive of knowledge

and power of 'my people'.⁷ Thus far I have not opted for retreating from research across these often painful boundaries.

Liberationist arguments around mandate could vary quite profoundly. Because social class and race form perhaps the most harmful structural boundaries between my social location and that of the research participants, I draw on Latin American liberation theology (LALT), which has traditionally emphasised the class struggle, and South African Black theology (SABT), which has shifted from emphasising the race struggle in general to focus especially on the situation of poor black people (see e.g. Vellem 2012, Phiri and Gathogo 2010). My reading here does not aim to provide a thorough understanding, analysis or critique of either discourse, but at making sense of my ethical approach to fieldwork.

LALT has traditionally underlined the need for a theologian, or church, to choose the option for the poor, or, in other words, to 'convert' into wanting to see the world from the standpoint of those who suffer structural injustice. The father of LALT, Gustavo Gutiérrez (1979:9), speaks of conversion as a radical restructuring of one's own approach to life: it represents a "break with our mental categories, our cultural milieu, our social class, our old way of relating to other people, and our old way of identifying ourselves with the Lord." Methodologically the choice to convert is, ultimately, a choice of personal politics that are in line with the structural struggle against inequality and for justice. In his critical reading of LALT, Tim Noble emphasises that in such identification the poor must remain the 'other' for the theologian. The other is the one who "challenges the theologian and enables her or him to encounter the living and liberating God at work in the world" (Noble 2013:3), and the one who "commands" the theologian (Noble 2013:81, drawing on the work of Emmanuel Levinas). Instead of one's own social location (Who am I?), the primary weight is then on the social location of the interlocutor (Who are you?). Such an emphasis might partly originate in the fact that socioeconomic poverty has traditionally been the primary locus in LALT as compared to other structural struggles, a reality which automatically sets most (if not all) of us full-time academics apart from the first-hand personal experience of what is being reflected on. Moreover, if the key to thinking about mandate is the choices the researcher makes in relation to politics, this implies not only a given way of thinking but also spending time in given spaces (see Gutiérrez 2003:125, Gutiérrez 1983 quoted in Farmer 2013b:35).

⁷ 'My people' is in brackets because, as much as I do not believe in a monolith whiteness and, moreover, do not share or understand the world of many who share my skin colour, at a societal level we do share in white privilege precisely because of our skin colour and what it implies. In other words, my personal choices – let us here even assume that I did succeed in making them boldly – do not remove me from society.

In SABT the implications of the scholar's social, and in particular racial, location have been central to discussions on method (see Buffel 2010). Recently, for instance, Black theologian Rothney Tshaka has in his writing implicitly challenged the limits of the kind of personal political choices described above. Tshaka (2007:533-4) begins an article "African, you are on your own!" by repeating the question he had asked John Mbiti in 2003: "in our talk about African theology have we thoroughly dealt with the concept 'African' and have we clearly indicated who is qualified to speak on the subject of African theology?" In the article he proceeds to position himself against Thabo Mbeki's (1998) generous definition of African that includes people of all races committed to the continent. Important to this discussion on mandate is the fact that the question is about who can speak *about* African theology, not simply about who qualifies to claim to speak *as* an African theologian. The overall question is about the implications of one's organic racial location for one's understanding. Tshaka, whose key analytical category is race, gives a more optimistic account about listening across the boundaries set by socioeconomic class: "it cannot be argued that (the middle class) cannot speak on behalf of the masses, although this talk must take the organic credibility rule seriously" (Tshaka 2014:2, drawing on his reading of Dwight Hopkins). Yet in the interface of ethnicity/nationality and class, he again emphasises the limits of one's abilities to hear across social locations as he notes, albeit in a footnote, that we are likely to never be able to understand the attitude of the non-South African migrants from Africa towards survival ("doing whatever it takes to survive") because of not having been in the same situation (Tshaka 2010:130).

Even when I opt for more faith in the possibility of a researcher's (limited) conversion to listening to the other than what I detect in Tshaka's writing, and believe that such listening indeed is beneficial, I agree that investigating the limits to hearing should be an imperative part of the research practice of middle-class scholars, and much more so white and/or male middle-class scholars. Tshaka reminds us that it is crucial to explicate what we claim to be and do. In my understanding, interlocution is not a space of accessing and claiming the truth (that would lead to speaking *for* someone) but a space of listening and dialogue (speaking with someone, as well as reporting on that conversation) (see also Scharen and Vigen 2011:22-23). Instead of speaking of *giving someone a voice*, I would rather speak of inviting someone's voice to be part of the academic conversation and conversations in other spaces – because of the implications of the terminology on understanding agency. Moreover, the people whom I engage with in the township or the city help *me* to find a voice to talk about social injustice from a particular angle in and beyond academia. My motivation is to hear and see what my research participants hear and see around them, and to let that experience inform my understanding of and (academic

and other) actions in the world, as someone taught by this particular group, among experiencing other influences.

One of the reasons why I choose to continue to battle with questions about mandate, instead of opting to do ethnography among people who inhabit my social location (for most full-time academics, this would mean, among other things, exclusively middle-class people) is that, in my experience, it is these very long-term relationships with people who occupy different social locations – especially, though not only, with regard to socioeconomic class and race – that have truly challenged my thinking. I also do not see theirs as the sole truth, which would stifle the discussion with an ideological straightjacket (see also Ngwane 1994), but as an important truth that needs to inform the struggle for social justice. Overall, ethnographic research as a liberationist tool has the potential to shift individuals' understanding of the world and to unsettle dominant discourses.

4.2 Second research ethical question: On personal relationships and particular stories

We spoke with Givemore, one of the young people who are participating in the research project, about research and of his potential vulnerability and that of others as research participants. He made an interesting point. They – he himself and the other young people – are people I already know and hang out with anyway, and therefore he does not see a danger of me taking advantage of them. Givemore turned my worries about research ethics in this setting upside down, as he suggested exactly the opposite of my initial ethical concerns.

The second ethical question relates to navigating the questions around power, access and understanding of the world at an interpersonal level. How could I ethically navigate a research relationship with these particular young people, whom I know as a youth group facilitator (i.e. an authority of sorts), and some of whom I have known as an 'older sister', an adult, for several years since they were teenagers? Would some feel obligated to participate because of our existing relationship? How should I engage with the story of young people whom I care about at a personal level?

Together with the questions around mandate, questions at this level had stopped me from starting this project for some time. When I did start, I thought it was even more important than usual to convince everyone individually that their declining my request to participate in the project would not be a problem of any kind. Young man after young man listened to my story. Kenny's response sums up the general attitude: "No problem." The questions the young people did raise were different from mine. Tatenda wanted to clarify whether I approached him as an individual or a mediator

who would talk to others about the project. Prosper asked if I had also spoken to “the other guys”; he was one of the first I spoke to, so I told him I planned to talk to others over the age of 18. Anonymity in a tightknit community meant something different than people not knowing, or someone not wanting others to know, whom I engaged in the project. Richie questioned the fact that he was to sign the consent form with his real name when I had just said that their names would not be used, exposing the illogical nature of our academic guidelines. Givemore’s comment, quoted above, turned around my initial hesitation related to engaging these young men. This in itself, of course, is no proof of my research being ethical. Researchers might well be well-liked by people, but that does not necessarily say much about research ethics (see Smith 1999:3).

If commitment to the option for the poor at the structural level indicates a political commitment, at an interpersonal and ethnographic level I read it to imply commitment to these particular young people as human beings (see also Scharen and Vigen 2011:21-24). The full humanity of the interlocutor, whom the system maybe wants to strip of his humanity, becomes central in the face-to-face encounter. Marginalised people and groups are then not just those who can expose the cruelty of the system through their experiences. They are people who live, think, fight, love, pray besides struggling to survive and make ends meet; no one’s reality is exhausted in the tragic structure but is rich in its complexity (Gutiérrez 2003:125, Gutiérrez 1988:xxi quoted in Noble 2013:20, see also Noble 2013:22, Maduro 2009:21).

Methodologically the personhood of this young man who sits opposite me in an interview translates into my careful listening to him as the one who ought to command me as a scholar (see Noble 2013:81). “How can I dialogue if I consider myself a member of an in-group of ‘pure’ men, the owners of truth and knowledge, for whom all non-members are ‘these people’ or ‘the great unwashed?’” Paulo Freire (2000:90) asks poignantly. Instead, “at its best, ethnographic work ... reflects an engaged dialogue with others” (Sharen and Vigen 2011:21-22). If a young man chooses what academics would call a theology of prosperity over that of liberation, I cannot use a liberationist ideology to silence him in my writing. If an interlocutor offers a conflicting view, it needs to be addressed as more than a proof of the power of the system to indoctrinate. Denying respect for the otherness of the interlocutor, and his or her intelligibility and intelligence, soon lands one in a space where the otherness is simply a commodity to be capitalised on (see Scharen and Vigen 2011:22, Smith 1999:82, 88-90) – here as a means to a liberationist end. As a stance this is, of course, self-evident to many, but at times we as critical scholars do not seem to actually be willing to truly listen.

This does not have to mean that the researcher lets go of her or his commitment to the theology or politics of liberation. Methodologically a creative mutually

enriching, perhaps corrective, balance between a critical biased liberationist social analysis at the structural level and truly listening to people at the personal level could be sought through a “hermeneutics of suspicion” (Fulkerson 2012:137) directed towards the systems that shape society, as well as towards the liberationist tradition itself, and “a hermeneutic of generosity” (Farmer 2013a:18) towards what and how people describe and define their reality. When both are respected, the former can at times explain the latter, and at times the latter can challenge the former.

Such commitment to listening to the other as a human being has concrete consequences. In Givemore’s comment I hear trust in my ability to hear and respect his story. Ethnographic research should aim at understanding the world of the interlocutors and listening to what is important to them, and not at exposing people’s secrets (Malkki 1995:51). As the person who approached the young people, I implicitly promise – because of the nature of our long-term relationship – to want to understand their thinking in a sympathetic light (which does not mean being uncritical, which would come close to being condescending). As noted above, anonymity in the small community has not meant – at least in the context of my project – that others would not know who is participating. When I use the data, I discern what to say and what not to say for people not to identify the person; or if I am hesitant, I can check with the person whether they think it is appropriate to mention something. Therefore I would also not share my data with other researchers. If one does not share a positivist view of understanding as something that is akin to measuring (Smith 1999:42), sharing ethnographic data that is produced in long-term relationships easily violates the relationship and the human beings participating in that relationship.

4.3 Third research ethical question: On invested interpersonal dialogue as action

I sat on the stairs in front of a building in the township. We were to discuss the research project with those participants who stayed there. One of the younger youths came to greet me and asked why I had come there that day: “Are you doing another programme?” The ease at which she paralleled this research project with the youth group project that she too had participated in the previous year – as had the older youths, who now were involved in the research – caught me off guard. She might well have made the comment in a context of not having heard much about the research project from the older youths, but nevertheless she got me thinking.

What, if anything, is in this ‘programme’ for the participants or their community? What good could there be in this for these very young men? What would it mean for these people not to be a means to an end that is beyond their reality? In the

liberationist tradition, action is a central component, and is said to be the first act of theology. The ideal is a hermeneutical circle of praxis, that is, practice of a community, critical reflection on that practice, and an application of the critical reflection. In such a design research is not a matter of coming in, collecting data and going out (Smith 1999:15, Beckman 2014); unless, of course, one believes in a trickle-down effect for the sake of the collective good of humankind, a position that Smith (1999:2) rightly criticises. While there is nothing exceptionally liberationist in participatory or action research, the liberationist tradition is one of the schools of thought that encourage one to search for forms of meaningful engagement beyond data gathering as an aspect of ethical research.

Two examples expose the challenge involved in including action as an integral part of an academic text. First, in my doctoral research, which was informed by a praxis cycle approach, I explained that I did not include an action section, but that “through the text the researcher may offer insights that aid the community’s further ‘reflection’ and ‘planning’ and thus become a catalyst in the community” (Hankela 2014a:20). In other words, as an outsider my role was not to decide on action but to offer my reflections as potential material for reflection and action in communities. Second, in his book *Doing Christian Ethics from the Margins* Miguel de la Torre (2014) introduces a liberationist model for doing Christian ethics that involves five steps common to a praxis cycle approach. In the case study section of this book – which engages a range of issues from war to private property – he only uses three steps, leaving out ‘taking action’ and ‘reassessment’. He does so in order to leave space for the reader to think about the ethical questions from the perspective of the marginalised (de la Torre 2014:72). In relation to both studies, one could argue that ‘action’ takes place in the conscientisation of privileged readers; or that the intellectual’s struggle is (also) fought in academia, where the stakes for him or her are high (Bourdieu 2008:300). Yet a critic could ask whether the liberationist ‘bias’ in these books – in the absence of ‘action’ – actually reaches beyond words and the walls of privilege that surround universities.

Let us assume that research influences readers, policy makers, religious leadership or the academic discourse. That is one of the aims of academic writing, one aspect of liberationist action. Every liberationist, I believe, is indeed responsible, and enabled by his or her academic status, to write and talk in these different spaces; it remains one aim of my own research as well. Yet in this article I want to remain with the community, with the group of young men in Johannesburg. What is in this for them, if anything? The long-term relationship, which I have with the community with which I now do research, has made questions about action ever more pressing for me, but has also offered avenues to address them. As much as I do not qualify as an organic intellectual in this community, I believe that, from a liberationist stand-

point, it is my obligation to be a socially responsible intellectual, because the notion of action stands for a call to make research something that serves the community.

Influenced by Paulo Freire's (2000) writing, in my current research setting I have come to think of dialogue (both formal and informal), in which a scholar invests herself or himself, as *one* form of liberationist action. Dialogue as 'action' and mutual consciousness-raising is related to navigating the creative tension between critical social analysis and carefully listening to one's dialogue partners. I share with the young people – in various ways, verbal and other – my faith in social justice and the insights that I have gathered in my studies about unjust systemic realities. They continue to open my mind to understand what life, dreams, the world and challenges actually look like from where they stand. Such dialogue takes place in the form of research conversations (interviews and focus groups), but also in personal informal encounters, organised youth group sessions and sometimes on social media.

The youth group sessions that I facilitate in the township are not a direct part of the research project, even if research participants also have attended these sessions. But these sessions also teach me, even if I do not record this as data. The youth group is a space for reflecting on the world, race, class, gender and other issues together. It is a space where the young people are free to disagree (and they do!) and reflect on their own experiences and thoughts. My role then as a socially engaged academic (West 2003:x), or an older sister, is to place ideas, say, from my understanding of critical race theory or liberationist biblical hermeneutics on the table. Moreover, my research in this very context also informs my input in these sessions.

In the actual research, my on-going project plan includes discussions – dialogue spaces – with the young people around my data analysis. Not only is the idea behind reporting back, which at this point still lies in the future, to validate my analysis and to be open about what I write (see also Scharen and Vigen 2011:24), but also to introduce academic theories that I use in the research to the research participants, or "to engage in continuing knowledge-sharing processes" (Smith 1999:16). While de la Torre's book is positioned to help people of privilege to think about ethical questions from the perspective of the marginalised, reporting back aims to do the reverse. Such dialogue – between myself and the young people, between my social location and theirs, between their views and critical social analysis – is also not restricted to the intended report-back sessions. At times the young people have already challenged me to argue my point already in a focus group session, and indeed some of these moments, in which I have been personally deeply invested, have produced interesting insights.

The teenager's comment on the 'programme' in the opening story continues to challenge me to think of research methods that would be based on a joint journey

the same way as the youth group sessions are, namely to be more explicitly a space of thinking and *growing together* from the outset. After a focus group on xenophobia the final comment came from Richie, who spontaneously told us what he had learned during the session and summed up an insightful message for the rest of us. The teenager and Richie both motivate the academic to think about the questions and challenges in the community as one important aim – not simply the means – of a research project. This could take different forms: invested interpersonal dialogue in the actual community is the form I have found meaningful and doable in my current setting.

4.4 Fourth research ethical question: On the messiness of monetary and material exchanges

I had mentioned to the research participants over the phone that I am not allowed to pay for their participation in the research. When we got together with a few of them for my further explaining the research process and the signing of the consent forms, Richie asked: “Who would know if you did pay for the interviews?” As I started to explain the academic ethical guidelines, he laughed and said he was joking. But Richie’s joke made a valid point. Many young migrants, also some of these young men, do different kinds of piece jobs to make ends meet. What would be so different about an interview, that is, the person giving one to two hours of their time to the researcher?

The liberationist tradition speaks of the neighbour as the person “whose way I take, the person afar off whom I approach . . . the one I must go out to look for” (Gutiérrez 1983:44, quoted in Noble 2013:21). The tradition also speaks of serving the poor (Maduro 2009:22). In the context of the socioeconomic, this often means choosing to inhabit a context of scarcity. For a scholar the choice is made by and large by a middle-class person. Such serving and solidarity have a structural underpinning, a utopia of a just world as the source of motivation, but solidarity also takes concrete forms at an interpersonal level (granted that some contemporary liberationists’ academic work strongly or solely emphasises the structural). Then, “transforming the world into a place that fosters the dignity of *every* person challenges *all* people to consider in what ways they can help to promote justice and peace here and now” (Gutiérrez and Groody 2014:1, emphasis in the original). The urgency of the present takes on a different guise in interpersonal relationships compared to it being perceived as referring merely to the structures.

The choice to live and work where one assumes that one will find – or according to a certain social analysis is supposed to find – those whose lives are impacted on by the injustice of the human world naturally impacts on the nature of the relation-

ships between oneself and that community. Practical questions about the ethics of living together with research participants in a socioeconomically unequal world include questions about money and other material exchanges. It is commonly agreed in academia (especially the humanities/social sciences) that one should not pay for interviews. There is an air of suspicion that a payment can spoil the authenticity of empirical research in humanities. Such an ethical guideline clearly aims at encouraging participation out of free will. The data, such logic goes, could furthermore be influenced by the fact that the participant would feel they might as well give answers that suit the researcher who pays them.

The well-argued point by some qualitative researchers that the researcher is in any case part of the construction of the data (see e.g. Bryman 2012:33, 394, Rapley 2004) does not seem to impact on this guideline. If one assumes that paying for interviews affects the free will of the participant, or the content of what they will say, then surely so do other aspects of (long-term) relationships between people. These other aspects include other material exchanges, the role of which one is particularly aware of in a socioeconomically unequal context. Such exchanges may be directed at someone who is attending a research project or someone else in the community; either way, the research participants are likely to know of these exchanges. At times material relational tokens can be small things (e.g. a Christmas present or a birthday cake). At other times they can be more valuable (e.g. a payment for a passport, or arranging university tuition fees).

Whereas payments for interviews would be easy to manage, living in a context of material scarcity is not. There is no obvious answer for solving the concrete material entanglements in everyday fieldwork situations, but the recurrence of questions related to these entanglements is a given in a context like Johannesburg. For instance, one morning while I was waiting for the young people to come for a focus group session I was talking with Nyasha, a teenager, outside the dormitory where a few of the research participants live. I knew this teenager since the previous year, when we were involved in many youth group sessions together. The school year was about to begin and it turned out that Nyasha did not have enough exercise books, but apparently the teachers would understand why some of the students needed to use one book for several subjects. I asked Nyasha if we could go buy the books at a nearby stationery shop after I was done with the group. Exercise books became a natural aspect of this chosen life. Yet in other instances I have had similar conversations with other young people, for instance about someone not having a train ticket to go to school, and have remained a conversation partner without offering to buy that ticket. As Blessing, a young man whom I know from the same community where I do research, instructed me once, material exchanges are not *the* key to being human to the next person. Driving in Johannesburg with Blessing, we reached

red traffic lights. As at many Johannesburg traffic lights, a young man stood outside the car window asking for help. As we proceeded I asked Blessing what he thought I should do, as I did not feel that my passing on a coin would solve much, but could in the case of especially the younger people that I encounter at these traffic lights actually do harm. He answered: “Greet them, talk to them as you would to a human being.”

From a liberationist standpoint simply remaining aloof from the material reality, while participating in it on a long-term basis, is not sustainable. How could one authentically opt for zero tolerance in getting involved in material matters in the name of research ethics, while one has chosen to work in a context of scarcity motivated by the aim of understanding what the world looks like from that perspective, hoping that such understanding could be part of fostering socio-ethical thinking that in turn could facilitate change in society? Some aspects of embedded research relationships, which, in other words, are also long-term *human* relationships, are indeed beyond the research ethical guidelines and ethical clearance boards of universities, as important as these university structures may be.

From a liberationist perspective, the faults of meritocracy serve as one starting point to thinking about meaningfully participating in the material aspect of reality. Personal research relationships are located in a context, a social analysis of which acknowledges the limited role of merit in what an individual has in life, be it material possessions, wealth or education. If I have R100 in my wallet and Nyasha does not have exercise books, my buying those books is not my good deed; rather from the perspective of the notion of merit, it is simply part of making a wrong right. The preferential option for the poor is not based on the fact that the poor are good – or that one is a good person oneself – but that God is good (Gutiérrez, paraphrased in Sayer 2015, xi). The option to buy a few exercise books takes place in a situation where Elina has R100 and Nyasha does not have enough books.

Yet a liberationist reading of research ethical questions around material exchanges involves more than the material things, as Blessing too pointed out. In the preferential option for the poor “we find . . . a profound reflection on what it means to be human and to create a more humane world” (Gutiérrez and Groody 2014:3). Indeed in a relationship one party cannot simply be an ATM without that affecting both parties and the relationship, very likely negatively. Often money might not be the best, and surely not the only, way of ‘serving’ the next person. Moreover, the expectation of being *human* to the next person – treating the other with dignity – applies to both parties if the research participant is respected as a human being capable of humane conduct (see Hankela 2014a:370-371, Metz 2012). This can of course mean different things in different instances, but also cautions one to think of money in a broader context of humane interaction.

While the reasoning above does thus not offer an answer that fits every real-life situation in the field, it shifts the key focus of research ethics related to money and material matters away from potential risks to the authenticity of research data or outcomes. The focus of ethical reflection would rather be on questions of social context and social justice and, related to these, the complexities of interpersonal redistribution of resources. In a complex social reality an exercise book can at times be a natural aspect of a humane relationship in our inhumane world, while at other times some material exchanges could become a hindrance to a humane relationship.

5. Concluding remarks

From the standpoint of the researcher, ethnographic fieldwork is messy and unpredictable, fascinating and deeply enriching. It requires spontaneity, flexibility and humility, both in the field and in analysis. Therefore, it is crucial for anyone who sets out to do fieldwork to continuously reflect on research ethics in order to be able to make ethical and respectful decisions at the different stages of research, and in the relationships that transcend research. In this article I have chosen to reflect on such questions, which I deal with in my fieldwork, through a lens provided by the liberationist tradition, which offers a helpful starting point also for those who do not identify as liberationists. The liberationist emphases on social justice and lived experience from the perspective of the marginalised raise critical questions on research practice, but also provide answers. Moreover, the reflection in this article also aims at inducing a conversation among liberationists about the positive, critical and corrective role that a wider usage of ethnographic research methods by liberationists could have in ensuring the continuing relevance of the tradition in academia and society.

The first ethical question discussed in the article concerns the crossing of systemic social boundaries as a researcher. When doing research outside one's social location, the researcher needs to continuously make and remake a choice of personal politics which are in line with the preferential option for the structurally marginalised in her or his engagement with communities and in her or his advocacy and writing in academia and on societal discourses. At the level of research methods this means choosing to invite the voice of structurally marginalised interlocutors into the conversation, in and beyond academia, and to choose to learn from the interlocutors. Ethnographic methods offer a way of doing this.

The second question dealt with the implications of personal relationships and particular stories for research practice. Respecting the full humanity of the interlocutors, on the one hand, translates to careful and open-minded listening to their story. In other words, one needs to leave open the option that these stories challenge the liberationist tradition and call for its redefining. This is not to say that the

interlocutors have the only truth, but that their truth is taken seriously also when it questions the liberationist dogma. Moreover, at the concrete level of research practice the researcher is called to carefully consider the nature of her or his relationship with the research participants when discerning whether to share her or his data with other researchers.

The third question was directed towards thinking of ways in which liberationist action could take place among the community, besides aiming at speaking truth to powers that be. The call for such reflection is strongly built into the liberationist method and tradition; the reflection could materialise in different ways from research setting to research setting. Here I propose invested interpersonal dialogue as one possible way of living out the commitment to social transformation, and to the interlocutors, in the context of long-term (research) relationships.

The fourth and last question raised the issue of money and material exchanges, and the inability of universities' ethical guidelines to advise a researcher who works and lives on a long-term basis in a socioeconomically unequal context. In such a context, instead of emphasising the implications of material exchanges on the quality of the data, the emphasis in making ethical choices should instead be based, first, on a social analysis of inequalities and one's choice to inhabit the given context, and second, on the implications that these exchanges might have for the research participant as well as the relationship between her or him and the researcher.

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