Towards the emancipation of the ICT4D researcher: reflecting on a case study in deep rural South Africa

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Abstract:

In this paper, the authors contend that if the outsider-researcher involved in ICT for development really wants to make a difference and honestly address the emancipatory interests of the developing community according to local understanding, assumptions, needs and realities, that emancipation will have to occur on both sides of the "development divide". Using a critical theoretical underpinning, the paper discusses ways in which the outsider researcher and practitioner require emancipation in order to ensure more sustainable ICT for development. By relating to three narratives on an ongoing community engagement project in deep rural South Africa, the authors reflect on particular instances that facilitated self-emancipation. Lessons learnt include the value of cultural interpreters as research partners, tactics for community entry and a self-critical approach for doing data collection and research.

Keywords: *Self-critical, Self-reflective, South Africa, ICT for development, Cultural Interpreters*

1 Introduction

In most Information Communication Technology for Development (ICT4D) endeavours in Africa the assumption is that there are generally two groups of people involved: those in need of development (the developing) and the outsider "doing" the development (the developed). It is often a subconscious assumption that the party that is challenged most in the process and that learns the most (socially, economically, intellectually, culturally, creatively and personally) is the developing group and that emancipation needs to take place within the developing community. However, the authors want to put it to the reader that if the outsider-researcher really wants to make a difference, i.e. honestly address the emancipatory interest of the developing community according to local understanding, assumptions, needs and realities, that emancipation will have to occur on both sides of the "development divide". For the developing group in deep rural Africa it mostly implies the difficult cultural transition they have to make to understand new foreign ICT and to interpret it for their community and context, because Western culture is embedded in ICT.

For the outsider-researcher (often Eurocentric minded) it means realising the emancipatory interests of the community, and the understanding of meaning from within the lifeworld and realities of the local people so as to introduce ICTs, collaborate with community entrepreneurs and treat the local people in such a way that their traditional social fibre stays intact and that their cultural practices, protocol, agendas, values and dignity are observed and respected. It is the authors' contention that finding appropriate ways of introducing ICT as well as questioning the value of ICT and ICT policy is more of a reality check for the outsider-researcher or practitioner than for the local community member that is challenged by foreign ICT.

In scrutinising this reality and to communicate tacit cultural knowledge, the authors present rhetoric and reflect on stories (Pearlson & Saunders, 2009) about an ongoing ICT4D initiative in the Happy Valley* community in deep rural KwaZulu-Natal (KZN) in South Africa. The initiative involves ongoing basic IT literacy training to caregivers, teachers and nurses at local institutions who could benefit from using desktop software in their daily work.

A critical theoretical underpinning is presented that reflects the departing values of a group of academics involved in Happy Valley and in essence provide the epistemological approach required for understanding and questioning intercultural endeavours that form part of ICT4D in deep rural South Africa. Data collected include mostly informal interactions with community members and cultural interpreters supported by personal, self-critical reflection about observations, situations, assumptions and stories.

It is hoped that this paper will shed light on the reality and the need for the outsider-researcher involved in ICT4D research and practice in Africa to honestly question their own values, attitudes, motives and understanding of reality and the dire need for the outsider (often Westerner) and international community to be educated about their approach to ICT4D in Africa – or to state it more critically; to help the outsider think critically about their own approaches, assumptions and attitudes towards ICT4D projects in Africa.

2   Critical social theory in ICT4D

Authors writing on Critical Social Theory (CST) in IS often also work in the ICT4D context. Examples include Avgerou (2005), Adam (2001), Čečez-Kecmanović (2001) and the International Federation for Information Processing Working Group on Social Implications of Computers in Developing Countries (IFIP WG 9.4), who are doing pioneering work in CST (Avison, Fitzgerald & Powell, 2005). Avgerou (2005) suggests that the unequal power balance evident in the discourse between industrialized and developing parts of the world is one of the most critical issues of contemporary society. In confirmation, Lewis (1994) states that in a developing context, there is a need to question the preconceived ideas of both the impoverished and the rich which makes a critical approach to community engagement essential.

Applying a critical epistemology when conducting fieldwork, requires that the researcher, in addition to eliciting participants' subjective view of phenomena as is typical to the interpretive paradigm, also encourage reflexive accounts in both the researcher and research subjects (Kvasny & Richardson, 2006). It draws attention to assumed power relations in intercultural communication (Čečez-Kecmanović, 2001). Avgerou (2005) advocates the explicit critical examination of the researcher's tacit knowledge, emotionally

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Names of people and places have been altered to protect the identity of the people involved

charged preconceptions, political convictions and moral values, and empathy with research subjects in building understanding and knowledge.

During our ICT4D initiative in Happy Valley we as a team of academics had to constantly question and be critical about the value of ICT and the way ICT is introduced into this community. We also had to explicitly examine (and therefore be critical about) our own attitudes, beliefs, intentions, and assumptions that might have emanated from our specific "outsider" cultural background. It was necessary to be aware of how our different views of reality might possibly distort intercultural communication that has to take place during community engagement. We realise that a critical approach to ICT4D research and practice would assist us in this endeavour and ensure the sympathetic meeting of minds during intercultural endeavours.

3   Research objectives

As mentioned, a critical epistemology requires both the interpretivist approach of looking "from the inside" and a critical reflexivity. As to the latter, it is contended that not only the emancipatory needs of the developing community has to be taken into account, but also the need of the researcher/practitioner to be emancipated of preconceived notions, in order to develop an openness to act in the real interest of the developing community (De Vos et al., 2007). In a critical discussion of MIS research, Lee (1999:25) poses the question: "In what ways do MIS researchers themselves require emancipation?" Similarly, we can ask: *In what ways do ICT4D researchers and practitioners require emancipation, in order to ensure more sustainable ICT4D?*

In the Happy Valley case, some lessons have already been learned by the ICT4D project team in their interaction with the community. The authors will aim to address this question by relating to narratives and rhetoric about their own ongoing processes of emancipation.

4   Research methodology

In this study, a combination of critical ethnographic and participant observational strategies were used to do fieldwork. Participant observation in fieldwork allows the researcher to be both an emotionally engaged participant and a coolly dispassionate observer of social phenomena (De Vos et al., 2007). Critical ethnography allows the researcher to "step outside his own narrow cultural background and to set aside his own ethnocentrism to view the world from the viewpoint of other human beings who live by different meaning systems" which is the essence of what the critical social theorist believes in (Myers, 2009). Critical ethnography views the research as an emergent process in which there is dialogue between the researcher and the people in the research setting (Myers, 2009), thus allowing the researcher to view social life as constructed in contexts of power and open up to scrutiny, hidden agendas, power centres and assumptions that inhibit, repress and constrain (Thomas, 1993, cited in Myers, 2009). For the critical theorist, this approach is emancipatory and an opportunity to be self-reflective as the researcher is empowered to investigate beyond explicit values and assumptions to taken-for-granted-assumptions and unwritten rules and protocol.

Since community entry is an ongoing process of penetration, and community gatekeepers and cultural interpreters are integral partners in the research process (De Vos et al., 2007), the researchers continuously reflected on and discussed observed behaviour and engagement with cultural interpreters. In addition, cultural interpreters played an

integral role in deciphering meaning and interpreting social phenomena. Lessons learned were documented and incorporated in ongoing community engagement.

During participant observation, the researchers had to aspire to a number of key characteristics and tactics. 1) They had to allow for a time of enculturation (Myers, 2009; Leedy & Ormrod, 2005) and to get a sense of the cultural context; 2) they had to maintain a critical self-reflective mindset as it is as important as rigorous treatment of data; 3) they had to grow and maintain good honest friendship relationships with cultural interpreters; and 4) both procedural aspects and analytical aspects of participant observation were documented since they may reflect important characteristics, principles and values (Myers, 2009).

Throughout many ongoing engagement opportunities, the researchers gathered and documented many stories and quotes from community members and cultural interpreters. The researchers engaged in numerous semi-structured and informal, impromptu, opportunistic and spontaneous conversations with people, gaining access to the "unofficial" story and deeper meaning. The researchers are in possession of several sources of data. These include recordings of meetings and interviews, text messages, emails, narratives, feedback reports, detailed field notes as a form of commentary taken during community engagement and so forth. Data was collected and analysed almost simultaneously. From the data, the various materials were collated into narratives that retrospectively reflect stories of meaning making (Myers, 2009). From the narratives specific values, themes, tactics, guidelines and principles are put forward that could assist in answering the research questions.

5 Project context

The Happy Valley initiative is an ongoing ICT4D project that was started late in 2008 by the Department of Informatics, University of Pretoria in deep rural KwaZulu Natal (KZN). The Happy Valley community is one of the poorest in South Africa and they are plagued by numerous difficulties such as extreme poverty and a high occurrence of HIV and tuberculosis (TB) infections. According to informants from the community, Happy Valley is a community in tension mainly because of sickness, death, malnutrition and extreme poverty. Most people are either infected or affected by HIV and AIDS. Because of these conditions, there is a growing number of orphans while a general feeling of hopelessness impacts negatively on development initiatives.

In contrast with these dire circumstances, several very successful community owned initiatives have been started in the region. These include an orphan care unit, a hospice doing groundbreaking research on HIV and TB and Happy Valley School. Happy Valley School is considered one of the best schools in the region despite the various difficulties they face. Happy Valley School and the hospice are also the primary focus areas for our ICT4D project. As members of the Department, we aim to empower caregivers, teachers and nurses through ICT so that more people in the community may be empowered and emancipated.

At Happy Valley School a number of IT training initiatives have been started. So far, 24 teachers were trained in basic IT in a UNESCO funded training project, four teachers were empowered through a train-the-trainer initiative to further ICT training in the region and as a result, 10 nurses from the hospice are now being trained in basic ICT. Further courses are being planned for 2010. Coinciding with the IT training, a number of community engagement activities have been started, for example, an annual campus trip

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for grade 11 learners while lessons learnt are being implemented in another rural school close to the university.

6   A narrative about cultural interpreters

The first narrative is about how the team interacted with cultural interpreters from the community. In Happy Valley, we are fortunate to have the support of a Westerner who has worked and lived in the community for almost 20 years. Martha is well accepted and loved by the locals, whose language and habits she came to know. Martha grew up like most of the people in the research team. During our first visit as team of academics, she took great effort in briefing the group about the not-so-evident cultural differences, and sensitised us to some of the basic practices of respect. The following is a personal reflection on an experience with Martha as a cultural interpreter and gatekeeper and how she guided the researcher in the process of self-emancipation:

> During my first visit to the community, my family and I stayed for a weekend at the orphanage where Martha worked. The Saturday evening we had a braai (barbeque) on the front porch. While being there some local youngsters in their early twenties, apparently a little inebriated, approached us and insisted on having some of the food we were preparing. Initially the conversations seemed not too significant and more like teasing to me. However, at some stage, the two men started making promises about what they would bring to me the following morning in return if I give them something. My "witty" response, in my ignorance, was that they were lying about their promise. Also, I responded in my indigenous language, Afrikaans. Their behaviour immediately turned very hostile as they started threatening us with various actions should we not give them food. I was surprised at their reaction, because I didn't mean any harm and was still trying to be friendly. Later they picked up stones, apparently trying to instigate us to some reactive or aggressive behaviour. They told us that we should leave the town before 5 am the next morning or "there is going to be trouble". The situation probably would have turned very nasty had we responded in a similar manner. Luckily, we had the sense to remain calm and keep on ignoring their threats. Inside I knew that I was on someone else's territory and could not respond in the same way I felt about these two fellows. For me it was a relief when my friend's wife called a security guard at the orphanage and the two fellows took off. I had to do a lot of introspection after that first interaction with locals on their territory.

> Martha, the cultural interpreter, later on laughingly said that it is typical to my Afrikaner way of doing things: assertive, to the point and straight up honest about what is wrong or right, even if we are teasing or polite. Apparently, telling a Zulu he is lying is a serious insult to their understanding. Also, I learnt later that in their culture one should not refuse a visitor food. It is custom to share food with whoever comes along invited or uninvited. I, therefore, made two cultural mistakes, and became aware of two important values I should aspire to. Firstly, I explicitly learned about being aware of the other culture, their protocols, practices, ways of showing respect, their common sense way of doing things, interacting and sharing. It necessitated me to reflect and think before I talk, respond or act in the same way I take for granted in my culture. Secondly, I learned something about myself. I did not realise that my apparent (I did not explicitly realise that I was like that) assertive way of communicating could potentially create a communication gap in this community. In my mind, assertive honesty is an acceptable way of communicating. I had to assume a certain mindset to be able to function in the community.

> I also realised the value of a cultural interpreter that could openly assist in deciphering

culture and interpret meaning from what I observed. It took me a while to develop ways of being self-critically open about what I observe and aware of the fact that things are not necessarily what they seem or as I perceive them to be. I came to think that even body language could be interpreted differently in the rural Zulu culture. I found it frustrating that I could not "read" people that easily, which led to a sense of insecurity about how I deal with people. At that stage, my strategy or tactic was to always ensure that I align with a cultural interpreter, observed what they are doing, how they talk and respond with people and show respect.

My first cultural experiences made me read two types of literature, firstly, literature about the African view of reality, which I'm afraid is not easily available or documented well. Secondly, I read about CST because I saw it as a way of emancipating myself by taking up a position of orientational enquiry that will allow me to be open, self-reflective and critical about my own understanding, beliefs, perceptions, observations and view of reality. Also, a critical stance allowed me to develop an openness to learn from cultural interpreters and community gatekeepers. My observation was that self-emancipation is the first step to community entry, having cultural interpreters as partners and friends.

Being who she was and understanding our outsider culture, Martha was the perfect partner for this researcher. Therefore, in order to pursue further engagement with this community and to establish an ICT4D project in the region, we invited her to visit our department and present something about the community. During the presentation, she explained and interpreted the culture and context in a way that we as outsiders were able to understand. In her presentation, which we recorded, she highlighted some of the social-economic difficulties in the community, some things about the local culture and possible ICT projects that we as a department could become involved in.

7   A narrative about community entry

Mrs Phiri, the headmistress of Happy Valley School, was first introduced to us by Martha. Mrs Phiri is an important partner in the Happy Valley community. In the following narrative the researchers briefly reflect on how entry was gained through Mrs Phiri as gatekeeper and how she become a partner in the IT training project.

During previous encounters, Martha advised us that we should introduce an idea to a community visionary and then allow for the idea to mature in their social structures and in their own time. Martha said that it is when the idea has matured and accepted by local people, that they will invite you to participate. She also said that this invitation may then be seen an indicator of successful community entry and acceptance and it is then when you may step in and participate by living up to the promises and expectations you created.

Martha explained that, based on her experience, ignorant and goal-driven westerners have the tendency to storm in with an idea or possibility and then often unknowingly mistreat communities. They naturally assume a certain position of power or status in development projects and then cannot understand why the project is not accepted. We realised that we should avoid an approach that reflect any supercilious efforts by "developed" westerners such as when they assume that a project will be accepted based on technical or financial possibilities. Martha said that "what integrity is to the white man, loyalty is to the rural Zulu" and that loyalty would be key in selling an idea and gaining trust.

So, as a team, we took Martha's advice and approached Happy Valley School. We

met up with Mrs Phiri and some of the Matrics to discuss study opportunities. In our initial interactions with Mrs Phiri, we observed her as very reserved and quiet and we remained uncertain about having her interest for a training project at the school. We proposed to Mrs Phiri how we as an IS department could possibly assist the school, but we left it to her to decide on in her own time. After a number of reaffirmations of our commitment and us waiting for several weeks, she finally called us and requested IT training for her staff. We realised that this was a turning point in the patient process of community entry. It was now important to follow-up on the suggestions and promises we made earlier.

We had some ideas with regard to how we could do the IT training, but in applying lessons learnt from Martha, we asked Mrs Phiri her inputs about how she wanted the training to take place. Mrs Phiri explained her needs and desires and who she believed should be trained and we did our best to respect that. As a result of this community entry approach, we were able to, firstly, empower Mrs Phiri as a community visionary for IT training at the school and secondly, we allowed ourselves to be guided by her and also learn from her and her staff. Had we not had the openness, patience and listening skills, we would have probably implemented something in a way only we assumed would be of value.

This self-reflective and open approach to community entry and engagement created a sense of partnership where Mrs Phiri and the teachers became primary stakeholders and community visionaries while we as outsiders took on the role of ICT training experts. Through a complementary train-the-trainer initiative, we also empowered a number of deserving teachers to continue the training at their own pace and discretion.

What we learned later through further stories told to us by Martha and some of the teachers was that the honest quality time we spend with the schoolchildren and the university campus tour we facilitated, really opened doors for us. The fact that we serviced their perceived needs and gave the Happy Valley School children more than what they expected, intensified and fast-tracked the establishment of community entry and trust relationships. One teacher for example said that after our interactions with the schoolchildren, they asked her to explain why someone would make such special effort with them. Through feedback and statements like these, we learned about establishing rapport and building trust relationships.

Through this community engagement experience, we learned a number of important values. Firstly, we learned to respect their way of letting a development idea to mature in the community. We also learned the importance of creating and stimulating ownership and vision and to always remain the supporter of a local initiative rather than the owner, even if we do most of the work. We learned that we should always be open to guidance from community gatekeepers and cultural interpreters as to how a new development idea should mature and be implemented. Ultimately, through self-reflexivity, we realised that cultural interpreters are key partners in deciphering meaning and interpreting social phenomena and community visionaries are those we as outsiders should align with. These community partners know the intricacies of their culture, the difficulties related to living, they can speak the cultural language and they are the ones that are able to receive new technological skills and then interpret it for their own people, in their own way and in context.

8   Personal research experiences

The third narrative relates to the authors' personal self-reflective experiences as they collected information for research in Happy Valley. The narrative is based on the critical

observation that we are forced to remain aware of how our own language, culture, religion and value systems are hampering our understanding of the social context in Happy Valley. The following narrative illustrates this:

As a white Afrikaans speaking female, I take my individualism for granted, i.e. I have the freedom to be outspoken, to say what I think when I want. In the deep rural Zulu community, I am oblivious to the sensitive web of social norms that I am never directly confronted with. I have to hear from the cultural interpreters that much of my regular behaviour would be considered rude. The local people are too gentle and respectful to tell me in my face; that is not their way.

In one instance, I attempted an interview to gather data for my research. I found the respondent strangely unresponsive. I put a lot of effort into phrasing and rephrasing my questions, and the person just responded with a "yes" or "no". In addition, I found working through two levels of interpreters somehow had a barrier effect on what I tried to gain from this respondent; it was difficult to build up a rapport. When we started packing up to leave, the respondent all of a sudden started volunteering his life story. He shared a wealth of information that I was able to incorporate into my research. During the short unforced conversation after the interview, I learned more than what I did during the interview itself.

In another instance, I visited a number of remote houses, accessible only by foot, together with some Western ladies from a city church who wanted to minister to the rural people. The ladies were accompanied by an elder from a local church who also did the translation. At this stage, I was acutely aware of the social distance between male and female, as well as between young and old, within the rural community. Yet, I observed how the Western ladies asked questions of a very personal nature to an older male, who freely shared information about his private arrangements and habits. I was amazed.

While still subconsciously processing these events, I have learnt the following. Firstly, being assertive and proactive in this context is not necessarily helpful - on the contrary. The respondent of the interview only "rose to the occasion" when I released control. He was not unwilling to share information, but it seemed that he wanted to do it in his own way. When performing visits along with the church ladies, I simply accompanied them, imitated their manners and observed quietly. Somehow, "lying low" while observing gave me an excellent information collection vantage point.

Secondly, with regard to male-female relations, I learned a two-fold lesson. Martha, the cultural interpreter, initially told us that there is a huge distance in social standing between male and female in this community as well as a clear division of roles and status. The two gender groups keep apart even during meals. Within the gender groups, age provided a further hierarchy, and one had to always show respect to your elders. This, according to Martha, was a simplified view of social relations of which she herself was still learning the nuances. I tried to keep this view in mind, only to see it overthrown in special situations. The dignified white ladies and their association with the church must have carried some special status that allowed the local people to respond as openly as they did. In the process, I learned that I could not just replace my personal preconceptions with "thin" and simple new social rules. I had to remain open to the unexpected in order to be emancipated from both my previous as well as new preconceptions and understanding. It is not wise to generalise too soon with regard to social behaviour in this context.

9   Conclusions

The aim of this paper was to present narratives about the self-emancipatory experiences of two researchers involved in ICT4D in a deep rural Zulu community in South Africa. Practical examples were provided of instances where they had no option but to change and adapt some of their preconceptions. In addition, taking a self-critical and self-reflective position in fieldwork allowed the researchers to be open to the guidance of cultural interpreters and question underlying assumptions, values, protocol, beliefs and strategies and their relevance to practical ICT4D work. Critical social theory also allowed the researchers to formalise and communicate their learning.

Results from this paper show that self-emancipation is central to ongoing and sustainable community engagement in deep rural South Africa. Being reflective and self-critical also allows the ICT4D researcher and practitioner to be more culturally sensitive and open to address the real emancipatory interests of deep rural communities according to their needs, understanding and view of reality.

The authors are both busy with ongoing PhD studies in Happy Valley. They are using different approaches and frameworks to help them make sense and be more effective in the very different social contexts to which they are exposed to in the ICT4D project. The research presented in this paper is part of an ongoing initiative. There is still much to be done in terms of ICT interventions in the community, and the emancipation of the researchers is also ongoing.

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