

Interpretative research in the Global South: Do we need different methods?



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In this blog post, I discuss the need for social research which is skilled and competent in terms of methods (understood here primarily as research practice) when carrying out investigations in the Global South. If we use interpretative,

qualitative methods which follow the principles of openness and reconstruction, and use an abductive approach, we do not need different methods for research in the Global South. I argue that this is one of the big advantages of rigorous interpretative or reconstructive social research, which also implies reflecting on the researcher's position in the social field and the positions of our field assistants. It also implies flexibility in our research design, meaning which methods we use, in which sequential order, and in which context.

Flexibility in research design and continuity in theoretical orientation

Before I wrote this blogpost, I had never explicitly considered the question of whether field research in countries of the Global South requires methods different from those we use in countries of the Global North. This does not mean, however, that the way I use my toolkit has not changed over the past thirty years in the context of my research in various countries of the Global South. I still use the same tools for data collection and data interpretation, but I have become more flexible in the way I apply them. While my main focus has always been on the collection and analysis of autobiographies, I have increasingly used other methodological instruments, such as participant observation, spontaneous or planned group

discussions, family interviews, expert interviews and ethnographic interviews. In particular, I have become increasingly flexible, for instance in respect of the sequence or combination of methods used, or in the way I conduct interviews. With each succeeding research project, I have become more and more open as to the research design, depending on the conditions in the particular field.

However, it is my belief, or at least my hope, that this would have happened even if my research had been restricted to the Global North. My use of interpretative methods has developed in this way because I have always followed the principles of the so-called interpretative paradigm,

Pragmatism, and the Chicago School. And my research has always been based on a social-constructivist, and in the last twenty years also a figurational approach, with a special focus on biographical research (see Bogner & Rosenthal, 2017; Rosenthal 2012). This theoretical orientation is bound up with the basic assumption that, in order to understand and explain social and psychological phenomena, we have to reconstruct their genesis—the processes of their creation, reproduction, and transformation. This assumption, together with the idea that we need to reconstruct the subjective perspectives of actors in the different phases of their life and in the present, and their courses of action, explains why

sociological biographical research is so important for me. In the tradition of figurational sociology, this means adopting a processual, historical and intergenerational perspective that involves the reconstruction of figurations, of unequal and fluctuating power chances, and of the perspectives of both established groupings and outsiders (see Elias & Scotson, 1994).

My research is based on fieldwork, as well as other methods, including archival studies and document analysis, by which I mean discourse analysis of different texts, including media texts. In general, I follow the principles of openness and reconstruction, and use an abductive approach. In this

context, the question whether we need different methods, can be answered as follows: it depends on the methodology, methods and research design we use.

In addition to doing research in Germany, and for several years in Israel, I have conducted field work in Kazakhstan, Palestine, Jordan, Brazil and several African countries—going right back to 1989. In Africa, I have carried out field studies in Ghana and Uganda, in the Spanish enclaves of Ceuta and Melilla in North Africa, along with short periods of fieldwork in Morocco. And my colleagues and I have been conducting interviews for several years now with refugees and migrants who have arrived in western Europe, Brazil, Jordan or

Uganda, after leaving their homes in the MENA region, the Sahel or sub-Saharan Africa (Becker, 2021; Bahl et al., 2017; Rosenthal, forthcoming). Since the start of the pandemic, we have conducted online follow-up interviews with these migrants and refugees, and documented their situation in times of COVID-19 (Bahl & Rosenthal, 2021).

Especially when working in environments that as sociologists we are not familiar with, whether in Europe, Asia or Africa, it is important to be flexible in accessing the field and in the use of different methods. This depends on which forms of access to the field open up more easily than others. In other words, which

methods I use, and in which sequence, is always determined by how the work progresses. In some settings, we may begin with observations and group discussions, perhaps arising from chance conversations with different people, and then go on to conduct biographical-narrative interviews in a second step. By contrast, in a study I carried out with Artur Bogner of so-called child soldiers in northern Uganda who had returned from the Lord's Resistance Army (Bogner & Rosenthal, 2020), we started by interviewing a former key actor in the peace process, who then worked as a field assistant for us and arranged contacts with returnees. After the interview with this key actor, we interviewed the returnees individually, and it was

these interviews that led to our being invited to the compounds of their families of origin, and having the opportunity to conduct family interviews and biographical interviews with various family members who belonged to different generations in the genealogical sense.

In almost all settings, we (Artur Bogner, my co-workers and myself) work with local field assistants who undertake the task of translating the interviews, and with whom we are able to discuss not only the interviews but also our general observations. Sometimes we recruit these field assistants from the same grouping as our interviewees, for instance because of their knowledge of the language,

as in the case of Wolof which was spoken by the Senegalese migrants we interviewed in Brazil. This is something that cannot always be planned beforehand. One challenge we were faced with when studying illegalized migrants, for instance, was that with each new field trip we met refugees with ethnic and national backgrounds that were different from what we expected, or from what we had experienced during previous field trips. This meant we had to react very flexibly, especially in respect of the ethnic and national background of the two interviewers (or interviewer and field assistant). During the subsequent analysis, this gave us very fruitful insights into how the rules of the we- and self-presentations changed according to

the collective belongings of the field assistants.

Methodological background of interpretative research

In the tradition of “Grounded Theory” (Glaser & Strauss, 1967), the main focus is on the discovery of theory during the process of empirical research, with the help of sensitizing concepts as discussed by Herbert Blumer. A sensitizing concept “gives the user a general sense of reference and guidance in approaching empirical instances. Whereas definitive concepts provide prescriptions of what to see, sensitizing concepts merely suggest directions along which to look” (Blumer, 1954, p.

7). Grounded theory does not mean an empiricism that is “free of theory,” but a conscious bracketing of theoretical presumptions, and a decided shift in the balance between theory and empirical discovery. This does not imply that the results of previous empirical studies and existing concepts should be ignored, but rather that one should bracket hypotheses at the outset of an empirical study along the lines of the procedure of abduction introduced by Charles Sanders Peirce (1985). Crucial to this procedure is that reasoning begins with data (or empirical phenomena) and then starts moving towards hypotheses.

An abductive inquiry does justice to the principle of reconstruction,

which is generally required in interpretative methods. This means that the researcher does not approach the texts to be interpreted with an existing set of hypotheses, in order to avoid subsuming them under definitive categories. This consistently open approach that follows the logic of discovery, this completely unprejudiced view of social reality, and this avoidance of the logic of subsumption, determine not only how data is interpreted, but also the whole research process, including data collection and the research design. Following the principle of openness means (see Rosenthal, 2018, ch. 2):

- Starting with a tentative research question that is open to

modification

- **Forming hypotheses during the research process**
- **Developing theoretical samples during the research process**
- **Being willing *at times* to ignore one's own particular research interests during observations or interviews**
- **During data collection, investigating the everyday relevance system of the actors (and not relying on that of the researchers)**
- **During analysis, giving priority to reconstructing the everyday relevance system of the actors**



Graffiti in the Moroccan city of Tangiers.

Photo: Courtesy of Dr. Artur Bogner.

Possible challenges connected with conducting interviews in the Global South

Regardless of the specific research question, I ask the person I am interviewing to tell me their whole life story and the history of their family. This applies regardless of whether I am interested in Christian and Muslim Palestinians

in the West Bank and the figurations or relationships between them, or former child soldiers in northern Uganda and the processes of their reintegration into civilian society after returning from the Lord's Resistance Army. This interview method is always accompanied by other methods, such as thematically focussed narrative interviews with so-called experts (such as members of NGOs, humanitarian organizations, the army or the local administration).

Now, we could ask, as some authors have done, whether requesting people to tell their own life story is a suitable method for interviews in the Global South, or whether we need to conduct them in a different

way. The answer to this question has a lot to do with our expectations with regard to a biographical we- and self-presentation: whether we are prepared to accept the way the person responds to a request to tell his or her life story, or whether we only accept a response that corresponds to our own fixed idea of a biographical narration.

Whether it works straight away or not, whether it takes four hours or just a couple of minutes to get an answer, whether the answer is a long chain of arguments or a stream of narration: the manner in which the interviewee responds to my request to tell me the story of their life gives me first important clues to the nature of the setting

or the grouping I am interested in. Thus it is not surprising that former child soldiers who have returned from the LRA usually begin with a detailed account of how they were abducted, and that they speak about their life before this event only after being asked about it in the second part of the interview; or that from a detailed account of their abduction and the first days with the rebels, in which they were forced to learn extremely cruel methods of killing, they jump to the time of their escape from the LRA, even though a period of maybe sixteen years lay between these two events.

This detailed narration, with hypermnesic memories of certain very bad experiences at the

beginning of a phase of extreme traumatization, can be explained by the brutal invasion of this event into the everyday life of these young people, an event which ruptured their "earlier life line," disturbed or damaged earlier self-images, and led to dramatic differences between their life before it happened and their life after it happened. We believe that these narrations also have the function of demonstrating that they were powerless in this situation and were abducted against their will. In such cases, the question is not whether it is a good interview or not. The important point is how this typical and frequently observed structure of the biographical self-presentations of ex-rebels can be explained.

Useful in this respect is what we learn in the external questioning part of the interview, or in further interviews with the same person, about certain phases of their life, and how these are talked about, or whether there are phases about which the person consistently says nothing. In our interviews with ex-rebels in Uganda, we succeeded in eliciting biographical narrations concerning periods which they did not describe in detail or which they skipped in the first part of the interview, the so-called self-structured presentation.

Another example of a phenomenon that needs explaining is the fact that in most of the interviews that my co-workers and myself conducted

in Palestine, more precisely in the West Bank, it was difficult to motivate our interviewees to tell us their life story. Rather, their primary concern was to present the argument that “we Palestinians have no internal conflicts, we only have conflicts with the (Jewish) Israelis” (Rosenthal, 2016). At first we thought that this was due to the presence of German researchers, but then we found that the interviews conducted by our Palestinian co-workers displayed the same phenomenon. Palestinians are anxious to resist any attempt—or Israeli policy—to divide them into different categories or “minorities,” which would make them even more powerless against the stronger conflict party of the Jewish Israelis. In their meetings

with members of our team, they fought against these (more or less intentional) attempts to split them up by repeatedly insisting that they are a united, peaceful community or we-group, in which no one suffers discrimination because of their religion, their status as a refugee or a long-time resident, or their legal status. In the course of this research, there were nevertheless some interviews in which the interviewees spoke very openly about the conflicts within the Palestinian community. For them the interviews represented an opportunity to talk about their personal problems, or the way their we-group (or the grouping to which they are regarded as belonging) is discriminated against. Most of the interviewees who spoke openly about

their experiences of discrimination could be regarded as outsiders in Palestinian society, such as members of binational families or people in a binational marriage relationship, people who have lived abroad for many years, or men who are defined as homosexual (Worm & Hinrichsen, 2016). Because of this empirical finding, the research team actively sought such outsiders as interviewees.

We usually hold more than one interview with each individual, usually combined with participant observations, inclusion of other people who are present during the interviews, and in some cases a transition to family interviews or group discussions with people who have been present from the

beginning, or who have joined us at some stage during the interviews. Whether in the refugee camps in the West Bank, or in family compounds in northern Uganda, my experience shows that one must expect other family members or neighbours to come and show interest in the interview. A contrastive comparison, for instance of an interview in a hotel at which, besides myself and the interviewee, only a field assistant or interpreter was present, and one conducted with the same person in the presence of "the family" in their compound, would give us insights into dominant discourses, in other words the rules concerning what can or cannot be said by whom and in what context. The challenges involved in eliciting biographical

narrations, conducting multiple interviews, and combining the findings from the interviews with data collected during observations or group discussions, are the same as those with which we are confronted when conducting biographical interviews with certain groupings in western Europe.

In general, I do not see these challenges as being connected with the method of narrative interviews. Rather, especially when beginning field research in unfamiliar cultures, we-groups, milieus or geographical regions, I have to cope with certain irritations or misunderstandings due to my ignorance of the local customs and discourses, or I hesitate to ask

certain questions because I fear that people might be offended or embarrassed. And yet these irritations can be an advantage! In the literature on methods we find the suggestion that we should put ourselves in the position of a stranger when studying our own society or social milieu. This happens without any effort when starting with research in an unfamiliar milieu. And so it is a big advantage that we scholars from the Global North find ourselves increasingly confronted with the discovery of phenomena that do not easily fit into our categories (and vice versa, researchers from the Global South have this advantage when doing research in the Global North). This applies, for example, to our understanding of family

structures, national borders, boundaries of groups, or concepts of state and “nation.”

In general it can be said that we should:

a) avoid subsuming phenomena too quickly under familiar categories

b) always have doubts that we understand what we hear or observe

c) never be afraid to ask questions in interviews.

Sometimes our ignorance of the regional or local context can lead us to think that certain phenomena are individual or special features of that region, when in fact they are far more widespread. For example, when I started working in Uganda, I had no idea how strong

the belief in good and bad spirits is in many regions of Uganda, and of Africa in general. I gradually learned how widespread it is, that it does not depend on the interviewee's educational background, and, very important, I had to learn what functions it can have. For example, family members of ex-rebels sometimes claim the returnees are possessed by bad spirits and give this as the reason why they have refused to allow them to return to the family compound—although the real reason is that the family does not want to recognize their rights to land or their right to participate in local decision-making processes. We also need to be aware that we- and self-presentations may be influenced by Western discourses, with the

result, for example, that many do not mention bad spirits. So we need to be aware that interviewees may not mention certain things because they know that the interviewer is a European, and we need to be prepared to ask questions about these things just as naturally as about any other topic.

Even if some of the returnees believe that their mental problems are caused by bad spirits, for us they are clearly consequences of extreme traumatization such as we can also observe in the Global North. Extreme traumatization results from spending a long period exposed to constant death threats and not knowing whether or when this might come to an end. The consequences of this are not

fundamentally different among different groupings of people; they are only interpreted differently. Whether they are traumatized by violence, or suffer from circumstances that are prescribed by inherited rules or accustomed discourses, they experience feelings of sadness and hopelessness, although they have been taught not to express these feelings, or they talk about them in a way that is different from what we researchers would expect. In other words, we should not assume that people from other parts of the world function according to completely different psychological mechanisms.

Significantly, I could have discussed the same challenges had I

been asked to give a talk on interpretative research in Germany.

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