

Turning the tables or business as usual? COVID-19 as a catalyst in North–South research collaborations

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An Ansoms 

Université catholique de Louvain, Belgium

Anuarite Bashizi

Université catholique de Louvain, Belgium

Romuald Adili Amani

Independent Researcher, Congo

Joel Baraka Akilimali

Université catholique de Louvain, Belgium

Lionel Bisimwa Matabaro

Institut supérieur du développement rural de Bukavu, Congo

Parfait Kaningu Bushenyula

Institut supérieur du développement rural de Bukavu, Congo

David Mutabesha

Institut supérieur du développement rural de Bukavu, Congo

Sylvie Bashizi Nabintu

Institut supérieur du développement rural de Bukavu, Congo

Guillaume Ndayikengurutse

Université du Burundi, Burundi

Joseph Nsabimana

Independent Researcher, Rwanda

Corresponding author:

An Ansoms, Université catholique de Louvain, Louvain-la-Neuve, Montesquieu I, L2.08.03, 1348 Louvain-la-Neuve, Belgium.

Email: an.ansoms@uclouvain.be

Patient Polepole

Institut supérieur du développement rural de Bukavu, Congo

Abstract

Since February 2020, we have witnessed COVID-19 profoundly disturb ongoing research dynamics – including research collaborations between the Global North and the Global South. Reduced international and regional mobility obliged research collaborations to reinvent their modalities. The role of field-based researchers (those physically ‘there’) has never been more crucial. This article draws on the testimonies of researchers from the African Great Lakes region to reflect on the positionality of field-based researchers in North–South research collaborations throughout the COVID-19 pandemic. Their embeddedness in the field foregrounded their complementary strengths in interactions with scholars from the Global North. We also illustrate how vulnerabilities – both unstable employment and field-related risks – were unevenly shared by partners in the Global South and the Global North. In conclusion, the COVID-19 experience inspired us to adhere to new collaboration modalities that move beyond post-colonial dynamics in North–South research collaborations.

Keywords

COVID19, research ethics, decolonisation of knowledge production, Great Lakes of Africa, North–South research collaborations

Introduction

The COVID-19 pandemic generated profound societal upheavals, including its human toll, significant economic losses, and social fragmentation. The pandemic also led to significant changes in work practices, particularly in relation to mobility. The academic world adapted, and scholars increasingly worked through online encounters. However, these new practices brought significant challenges for social sciences qualitative research, which is primarily based on social interactions and physical encounters with actors and practices. Creating deep understandings of social phenomena often requires an assiduous presence in the field (Olivier de Sardan, 2008). The omnipresent quarantines, travel suspensions, border closures and social distancing measures forced many researchers to reinvent their research methods (Okech et al., 2021; Wood et al., 2020).

For some, the travel restrictions incited experimentation with technological innovations (Howlett, 2021). Even before the pandemic, there was growing acceptance that face-to-face interactions were no longer “the gold standard against which the performance of computer-mediated interaction is judged” (Hine, 2005: 4; see also Fielding et al., 2008; Jenner and Myers, 2018). However, for several authors, remote forms of research remain a ‘second choice’ (Deakin and Wakefield, 2014; see also Johnson et al., 2019). Some cite technical (Jowett et al., 2011) and ethical challenges (Schatz and Volo, 2004); others note the difficulties in establishing trust from a distance (Abidin and De Seta, 2020), particularly in situations where violence and conflict may impede interviewees’ safety (Okech et al., 2021).

Other research teams leaned intensely on their researchers ‘on the ground’ since remote partners were obliged to (indefinitely) function ‘from a distance’. In many North–South

research collaborations, the ‘object’ of research is located in the Global South, while the funding and decision-making about research management happen in the Global North.¹ These collaborations are often characterised by skewed power relations anchored in neo-colonial structures and normative frameworks that inherently push researchers from the Global South to the periphery of knowledge generation (Bradley, 2007; McKenzie, 2019). Researchers from the Global South (especially those who are locally embedded in the field) have limited opportunities to participate in the entire cycle of research – from conception to valorisation of research results. Instead, they are mobilised as human capital in the margins – data gatherers, research assistants, and research brokers working on temporary contracts (Nyenyezi et al., 2020).

However, the global pandemic restricted the researcher movement, thereby reshaping positionality and the broader power relations characterising these North–South collaborations. This article illustrates how the COVID-19 crisis provided a moment of catharsis in the organisation of North–South research collaborations. We focus on research collaborations between Belgium and the Great Lakes Region of Africa to highlight how researchers of diverse positionalities were affected. Embeddedness in the field allowed researchers in the South to foreground their complementary strengths in interactions with scholars from the Global North. Yet, we also illustrate how vulnerabilities – namely, unstable employment and field-related risks – were unevenly shared by partners in the Global South and the Global North.

These findings have relevance for the post-COVID-19 period since restrictions on international mobility will continue to determine our working conditions. For example, mobility restrictions in the DRC are far from exceptional (e.g., the 2018–2020 Ebola crisis in Eastern DRC, see Nyenyezi et al., 2021) and security problems regularly impede access for outsiders. At a more global scale, climate change should make us question the ecological footprint of our travels.² Alternatively, scholars from the Global South have long faced many restrictions on their international mobility due to increasingly strict Northern migration laws. Organising physical encounters with people from various continents will likely remain a challenging endeavour.

Power relations in collaborative North–South research

Over the past two decades, a growing cross-disciplinary literature has reflected upon ethical challenges in field research (Adenaike and Vansina, 1996; Ansoms et al., 2021; Lee-Treweek and Linkogle, 2000; Legrand and Gutron, 2016; Nordstrom and Robben, 1995; Sanford and Angel-Ajani, 2006; Thomson et al., 2012; Wall and Mollinga, 2008). Questions about research collaborations between the Global South and the Global North are frequently raised, though often in a peripheral way. This section directly reflects on the achievements and challenges of such collaborative South–North research, including the post-colonial legacies and power relations that characterise such initiatives.

Collaborative research is based on the principle of establishing links and partnerships between different actors with a common goal in the research process (Smulyan, 1987). In North–South collaborative research, these partnerships involve scientific institutions (research organisations, universities, science academies) or researchers from countries in both the Global South and the Global North. Also framed as North–South research partnerships, these collaborative research initiatives

are key to enhancing opportunities for researchers from the Global South in knowledge production systems (Baud, 2002).

North–South research partnerships were first encouraged by the 1979 United Nations Conference on Science and Technology for Development (Gaillard, 1996). At this conference, the concept was strongly supported by the representatives of Global South countries (*ibid.*). Bilateral cooperation agreements were later established between research institutions from the North and the South, specifying the objectives, methods, means and duration of projects (Barré and Chabbal, 1996). In 1999, the United Nations Conference on Trade and Development in Vienna determined specific characteristics of North–South cooperative research (UNCTAD 1999, see also Gaillard, 1996). According to these principles, North–South collaborative research should favour Southern countries' development priorities, guarantee the participation of Southern partners as much as possible, involve joint follow-up, and provide a training component (*ibid.*).

Despite good intentions, the inherent assumptions of North–South collaboration often situate the Global North as the holder of the knowledge and the Global South as an apprentice (Bradley, 2007). Northern institutions are said to bring theoretical and methodological knowledge, while the South institutions are agents who generate and deliver the data. Many programmes assume the need to reinforce Global South research institutions' local capacities as a starting point (Carbonnier and Kontinen, 2015; Mwambari et al., 2022). The transfer of knowledge and technology is said to develop local capacity to produce 'objective' knowledge to counterbalance traditional forms of knowledge (Gaillard, 1996).

These assumptions were called into question over 20 years ago (Engelhard and Box, 1999; De la Rive Box 2001), and have only garnered increasing criticism since. For example, Ogden and Porter (2000) have noted the high-quality research (from various fields) produced by researchers in countries like Brazil, India and China. Others have highlighted how North–South collaborations also offer Global North partners the opportunities to learn (e.g., how to complexify theory and historical-framed ways of thinking (Bhambra et al., 2020) or navigate complex research environments and adapt research tools (Jentsch, 2004). However, persistent discriminatory mechanisms continue to push African scholars to the background. Briggs and Weathers (2016) illustrated how Africa-based scholars – who, on average, opt for a deeper more locally specific focus in contrast to the more generalising cross-country preferences of journals – are less likely to publish or be cited in top-ranked journals on African dynamics.

Today, mainstream discourse seems to acknowledge that North–South research partnerships strengthen the research capacities of everyone involved. Each partner should be recognised for how their expertise complemented the research team (Cole and Knowle, 1993). The mutual strengthening of capacities (Jentsch, 2004), the production of scientifically relevant knowledge, and the translation of research results into policy interventions are all important achievements that can be expected from a North–South research partnership (Droz and Mayor, 2009; Vidal, 2017). At the same time, North–South collaborative research is confronted with numerous challenges. Asymmetrical power relations favour the Global North (Anderson, 2002; McKenzie, 2019), resulting in inequitable access to information, training, funding, exchange, and publication possibilities (Bradley, 2007; Jentsch and Pilley, 2003). Northern institutions and their researchers also have more

control over the project design and management since most research funding is managed in the Global North (Maina-Ahlberg et al., 1997).

North–South partnerships tend to revolve around the Global North, while “disconnected peripheries ... follow more than they collaborate” (McKenzie, 2019: 427). Structural inequalities and colonial legacies result in situations where the North is considered as a *provider* and the South as a *receiver* (Jentsh and Pilly, 2003). Both sides often have an interest in perpetuating this imagination: the partner in the Global South depends on the resources this architecture provides, while the partner in the Global North bolsters its scientific (and cooperation) legitimacy by generating a perception of quality (McKenzie, 2019).

The evaluations of North–South research partnerships are generally coordinated by Northern institutions or Northern-based consultants. Thus, Southern reflections on North–South research partnerships (and their everyday implications) are quite rare (Bradley, 2007; Vidal, 2017). An interesting exception is the ‘Bukavu Series’, a series of blogs written by researchers from the Global South and North, reflecting on the realities of North–South collaborative research. The “Bukavu” authors reveal how researchers from the Global South are pushed to the periphery of knowledge production. They reflect on the challenges facing locally embedded researchers and the deeper mechanisms that define the power relations in North–South research collaborations (Nyenyezi et al., 2020). They criticise how researchers from the Global South remain invisible in collaborative projects; their specific ethical and emotional challenges often remain unaddressed (Mwambari and Owor, 2019).

Effective partnerships jointly pursue research questions, methodologies, field research, and analysis (Ansoms et al., 2021; Patel, 2001). Although many authors believe that collaboration should serve mutual interests and benefit all partners equally (see, e.g., White, 2020), this ideal is not simple to enact in practice. Even in cases where North–South interests are compatible, they are rarely identical (Bradley, 2007; Gunasekara, 2020). Asymmetries in power relations within North–South research partnerships have deep roots and are often unconsciously (sometimes consciously) reasserted and prolonged by new collaborations (see also Vogel and Musamba, 2022).

Exploring the ‘potential to equalize inequalities in research’ (Monson, 2020) in North–South research partnerships is therefore crucial for understanding how power relations work and evolve. This article takes such an approach to explore how power relations in our own South–North research group – and other North–South partnerships – have evolved throughout the COVID-19 pandemic. We are aware that each of our positionalities affects how our team members and interlocutors express themselves. This article fits within a long history of joint discussions on ethical dilemmas, emotional challenges, and power relations in our own South–North collaborations.

Collaborative research during the COVID-19 pandemic: A case study

The COVID-19 period has impacted almost everyone’s research trajectories, regardless of whether they are embedded in the Global South or the Global North. However, the wider power relations of scientific knowledge production influenced the scope of

individual researchers' coping strategies. For some, COVID-19 brought new opportunities; for others, the pandemic presented a huge obstacle to their research activities. This section analyses how researchers working in and on the African Great Lakes Region have experienced their profession over the 2020–2022 period. We reflect on how the crisis provided an opportunity to explore North–South research collaborations and individual contributions therein in new ways. We also consider the unevenly distributed risks and vulnerabilities that researchers were exposed to throughout the pandemic.

The inspiration for this article initially emerged from a collaboration between the authors – eight of whom were based in the South (Rwanda, Burundi and the DRC) during COVID-19 and three in the North (in Belgium). Together, we have conducted research on political governance of the COVID-19 pandemic and forms of local resilience in the context of crises. Our team includes diverse backgrounds and positionalities; some are PhD students, post-doc researchers, or professors at a Belgian university, while others hold positions at universities in Burundi, Rwanda or the DRC. Others are engaged with civil society organisations or research institutes (on longer-term or very short-term temporary contracts). All researchers in our team were somehow connected through a joint network prior to the COVID-19 crisis, and several of us had already collaborated in joint research.

At the outbreak of the pandemic, we decided to collaboratively analyse how the COVID-19 crisis was interconnected with other societal crises in the Great Lakes Region. We had people on the ground in Kinshasa, Bukavu, and Goma (DRC), Bujumbura (Burundi), Kigali (Rwanda); three others were based in Belgium. In the initial phases of the research, we worked with very limited funds (only covering local transportation costs); we later managed to secure funding from the *Fonds National de la Recherche Scientifique* (based in Belgium). This funding pushed us to refocus the scope of our project (to the border dynamics of Rwanda, Burundi and the DRC), with some team members leaving the project and others joining. The funding also improved our team's working conditions and expanded the scope of our project from urban to rural settings.

The qualitative data for this article were collected in different phases of research. In the first phase, we held monthly or bi-monthly online discussions to work out the analytical, methodological, ethical and emotional challenges of our research. These discussions were often informal – something in between reflections on findings and analysis. They took the form of unstructured talks about how we experienced our professions and our collaboration during the COVID-19 period. The first two authors used these reflections to write a preliminary analysis that was shared with the entire team.

In the second phase, the entire team commented on and enriched this draft during an online meeting in May 2021. Many oral comments were added, including detailed testimonies from our team's researchers. We also reflected on broader research experiences during the pandemic, as almost all of us were also engaged with other research projects. Three researchers from our own team formalised their reactions to the May 2021 report in written form (July/August 2021). We collectively determined that more information was needed from people outside our team to cross-check our analysis.

In the third phase, four members of our team conducted online and face-to-face interviews with 18 other social sciences researchers (four women and 14 men) in May and September 2021. Each of these locally embedded researchers works for universities,

research institutions or non-governmental organisations; they all depend on temporary contracts to fund their role in research projects. These semi-structured interviews considered three key questions: (1) How did COVID-19 affect them in their research profession? (2) How did COVID-19 affect the methodological, ethical and emotional challenges of field research? (3) How did COVID-19 affect their positionality in North–South research collaborations? Some replied orally (and their responses were transcribed); others responded with written statements. We asked for explicit consent from each respondent and guaranteed them anonymity.

The final phase consisted of two team meetings in April and September 2022. We used innovative tools (applied theatre and a game) to collectively reflect on the ethical challenges of our own North–South research collaboration during the COVID-19 period. During the first meeting, 10 team members engaged in non-verbal sketch improvisations on ethical dilemmas of research during COVID-19. These sketches were discussed collectively. During a second meeting, six old and two new team members (not among the authors) engaged in a serious game, named EDICO, which facilitates discussion on ethical dilemmas in contemporary organisations.³ Detailed written reports of both meetings were shared with the team members present for comments.

Our collaboration for this article began informally in March 2020. Therefore, we did not immediately engage in a formal ethical clearance procedure. However, when we obtained funding for a four-year project from the *Fonds National de la Recherche Scientifique* (Belgium) by the end of 2020, we applied for official ethical approval. In February 2021, we obtained ethical approval from the IACCHOS social sciences ethics committee based at UCLouvain in Belgium. This committee engages the researcher in a thorough reflection on ethical practices but accepts that practices on the ground may require moving beyond standardised protocols (we return to this below).⁴

Different positionalities – different opportunities

Several recent contributions highlight how power relations mark North–South research collaborations and determine the positionalities of researchers embedded in such initiatives (see, e.g., Mwambari, 2019; Nyenyezi et al., 2020). Positionality plays an important role in determining a researcher's working conditions. The COVID-19 crisis illustrated how researchers' positionality before the crisis affected the challenges they experienced throughout it.

At the start of the pandemic, researchers in the Global North were blocked from accessing the field due to restrictions on global mobility. While this was frustrating for everyone, there were clear divergences in how different researchers experienced it. In our team, the only non-African researcher, who works with a permanent contract as a professor at a Belgian university, testified:

I'm very frustrated with the fact that I will probably not be able to go to Central Africa for months to come. It's as if I'm cut off from half of my life. However, I do realise that I'm very privileged in comparison to other colleagues who don't have permanent contracts. In my case, the pandemic is not affecting my financial situation. For many others, COVID-19 is undermining their capacity to develop their career, and even to secure the livelihoods of their families. (Personal testimony of our team member, June 2020, Phase 1)

Other researchers working on longer-term contracts in the Global North wondered how confinement would affect their research careers. An African PhD researcher on a scholarship in a North–South partnership testified:

I'm working on a sandwich scholarship.⁵ I only have 24 months of research funding in the Global North. Now that I'm "stuck" here (in Belgium), I wonder how this will affect the course of my research. Courses are suspended, the library is closed. And I can't do any fieldwork either. I'm basically stuck in my room 24/7, in total isolation, living on a scholarship that I should normally use in one or two years in order to finalise my PhD. (Personal testimony of our team member, June 2020, Phase 1)

An African researcher residing in Belgium during the pandemic added:

I wondered how I was going to continue my research as I could no longer go into the field. Fortunately, I managed to organise Zoom meetings with people in the field, and virtual discussion sessions around results, analysis and information processing with other researchers on site. Somehow, thanks to Zoom, Skype and WhatsApp, I was able to continue my field research while being in Belgium. But I must admit that this can in no way replace the physical interactions, which are warmer and livelier, especially for the sociological studies that we carry out. We must admit that everything was not perfect, with poor connections from partners in the south. Several times, unpleasant hiccups impeded the smooth running of the discussions. (Personal testimony of our team member, July 2021, Phase 2)

Others faced many difficulties in reaching the field. An African researcher who was stuck in Kenya at the start of COVID-19 testified:

The pandemic was a very difficult period. Because of the context, I postponed my work schedule and this meant that I faced a lot of delay in the collection of the data for my research. Also, given the sanitary measures, the cost of data collection hugely increased because it was necessary to include expenses related to the purchase of masks, disinfectants, private transport, etc. Furthermore, (finding the appropriate) means of transport was a real headache. Travelling from Nairobi to my research areas was difficult because the airports were closed, and when they opened, the plane tickets had doubled in price due to the shortage of flights and travellers at that time. (Testimony of a Congolese researcher working in Kenya, September 2021, Phase 3)

In the Great Lakes Region, the political response to COVID-19 greatly differed between countries. Throughout 2020 and parts of 2021, the Rwandan government imposed very strict COVID-19 measures, while the DRC adopted highly pragmatic stances on banning mobility and gatherings. The Burundian government chose to ignore the COVID-19 crisis for quite some time (Bashizi et al., 2021). These measures did have some impact on researchers' ability to access the field; however, the bigger problem for locally embedded researchers was the lack of research funding (testimonies from our joint team meeting in May 2021, Phase 2).

The research agenda in the African Great Lakes region is largely determined by international institutions, non-governmental organisations, and foreign universities (due to a lack of local research funding). Many Western-based organisations halted

their research programmes since the ‘international’ staff could no longer travel. While the Great Lakes Region soon returned to more flexible working and travelling conditions (see Bashizi et al., 2021), ongoing research initiatives were slow to return. The suspension of internationally funded research projects plunged some locally based researchers into unemployment. While funding organisations’ international staff are generally on long-term contracts, this is often not the case for the African researchers hired to conduct fieldwork. Three researchers mentioned the difficult economic situation created by COVID-19. A female researcher based in Bukavu testified:

The COVID-19 pandemic affected us in a negative way because we had fewer and fewer requests from partners to continue ongoing research or to launch new research projects that we were expecting. Several donors or research partners had closed their doors and suspended their agendas. However, some partners kept in touch with us. We had regular online meetings where they asked about the local situation, but when we asked when we would resume the research, no one could tell us exactly when, all promising to resume after COVID-19. So we found ourselves unemployed until the pandemic was over. (Personal testimony of a Congolese researcher, September 2021, Phase 2)

However, other researchers (in our team as well as three of the eighteen researchers we interviewed) used their proximity to the field as an advantage. Researchers stuck in the Global North (and detached from the field) depended on local informants to keep up-to-date. After the first few challenging months, the major societal upheavals as a result of COVID-19 inspired some international research teams to begin new research initiatives. These initiatives required the intensive involvement of locally embedded researchers, who were the only ones who could provide on-the-ground insights. Those with already strong international networks capitalised on such opportunities. One of the researchers in our team explained how his embeddedness in the field, alongside his previously constructed networks in the Global North, resulted in many well-paid research opportunities (personal testimony of a Burundian researcher, team meeting May 2021). At the same time, it were still the Northern institutions who pulled the strings.⁶

In short, our discussions revealed major differences in researchers’ preoccupations during the COVID-19 pandemic, depending upon their positionalities in North-South collaborations. Researchers ‘stuck’ in the Global North were frustrated by the lack of access to the field. Those working on temporary PhD contracts were worried about how ‘lost time’ spent in confinement would impact their research careers. The researchers in the Global South all depended on short-term research contracts, so when internationally funded research initiatives were suspended, they experienced harsh economic challenges. However, those with pre-existing international research networks could mobilise when new research initiatives on COVID-19 challenges were launched.

The relevance of voices from the Global South

Soon after the outbreak, numerous (semi-)scientific voices began speculating about COVID-19’s potential impact in sub-Saharan Africa. The opinions ranged from rather

moderate reflections on COVID-19 as yet-another-crisis to apocalyptic prospects predicting millions of victims. What united many of these accounts was that they came from ‘African specialists’ based in the West who, at that point, were physically banned from much of Africa (CNUCED, 2020; UNECA, 2020).

Most pieces warned that if Western health systems were largely deficient in coping with the health challenges, the world should not forget about Africa, where access to health services is far worse. There seemed to be little space for more nuanced accounts. A Congolese researcher based in Belgium during the pandemic noted,

We have observed the disenchantment of scientific imagination with this pandemic. Faced with all the uncertainties, some knowledge was absorbed by the public opinion as “legitimate” knowledge, while other voices were very strongly discredited by the establishment. It raises questions about the place of research and knowledge in contemporary societies; (and of non-Western perspectives in that knowledge). (Team member, joint meeting May 2021)

Many of the highly publicised voices did not have deep knowledge of what was happening on the ground (Pailey, 2020). Furthermore, they ignored the already existing human capital on the continent (Happi and Nkengasong, 2022). This inspired our team to establish an initially modest research initiative to document the impact of the COVID-19 crisis. We soon confirmed the non-negligible health crisis; however, most societal problems originated in how preventative measures affected people’s livelihoods and social lives. People who depended on daily mobility for income lacked access to food; farmers were blocked from their fields; cities were disconnected from food chain provisions; regions were disconnected from each other and deprived of the benefits of mutual interdependency. While Western-inspired governance responses were implemented (particularly in Rwanda and, to a lesser extent, in the DRC), authorities on the ground had to strike a balance between the danger of virus propagation and people’s need to survive. Citizens developed coping strategies like those mobilised in response to other crises (Bashizi et al., 2021). Our findings clearly illustrated what should always have been evident – in the analysis of crises, field research and on-the-ground expertise are key.

The importance of researchers on the ground also became evident in our own team. While the researchers in Belgium secured (initially very modest) funding and set up the necessary mechanisms to coordinate and communicate, those in the Great Lakes region provided indispensable expertise for this project. Our locally embedded researchers could clearly discern which research questions were relevant and which hypotheses were beyond the scope of possibility. Ours was not the only research initiative that emerged. Two of our interviewees explained how the pandemic brought several new requests to collaborate from researchers ‘stuck’ in the Global North (interviews May–September 2021). Our own team members also confirmed this, with our collaborator in Burundi stating:

The context of COVID-19 has greatly increased the volume of my research this year. We have been solicited a lot by researchers from the (Global) North. They needed us more than ever because they can’t do (the research) without us. (Personal testimony of our team member, July 2021, Phase 2)

Another researcher from Congo said:

This year I had the opportunity to be integrated into a research team with researchers from the (Global) North and the (Global) South and to access a series of dynamics in connection to this team. The (COVID-19) crisis has widened the fields of reflection on societies and on crisis management. I've found it very interesting to discover the links between cities and countryside zones in crisis management, and to analyse the key role of rural areas in food supplies to the town. (Personal testimony of our team member, July 2021, Phase 2)

The role of locally embedded researchers could not be pushed to the periphery of knowledge production in these new initiatives. Researchers in the Global North were extremely dependent upon locally embedded expertise. Such new working modalities made new ways of collaborating possible (or reinforced pre-existing innovative collaborative approaches). These modalities emerged in the field of communication and coordination, of valorisation of local know-how in fieldwork, and of recognising the key role of locally embedded researchers in data analysis.

Firstly, North–South research teams working through the pandemic reinvented their communication tactics, mainly by integrating electronic platforms. These modalities connected the distant North with the field and also helped researchers within the region interact. Within our team, a researcher in the DRC explained how ‘these technological means of communication have really opened up the world to us’ (Personal testimony of our team member, July 2021, Phase 2).

Another researcher in Burundi said:

The pandemic crisis has been accompanied by the opening of new avenues of connection. The use of modern tools has made it possible to better bring together actors from the North and the South. During this year, I was able to attend conferences and thesis defences held elsewhere while I was in Burundi. This would not have been possible before. Moreover, we now realise that the system before where meetings were held face-to-face, excluded actors from the South for nothing. For once, we were aware that access to scientific networks for researchers from the South is easier and more equal. COVID-19 has put us all around the same table, facing the same communication conditions. (Personal testimony of our team member, July 2021, Phase 2)

Other team members however highlighted that the quality of networks was still very different; and the regular connection problems were a source of frustration during several of our joint meetings.

Secondly, South–North research teams had to continuously adapt when ideas were not possible on the ground. They relied almost exclusively on the know-how of locally embedded researchers to trace the trajectories of possibilities. Our team was frequently confronted with a mismatch between the assumptions made by researchers in Belgium and the (im-)possibilities in the field, as experienced by locally embedded researchers. Researchers operating from a distance often underestimated the diverse fieldwork conditions and speed with which conditions could change. For example, our Burundian researcher could move freely, while researchers in Rwanda faced strict confinement. Researchers in Belgium also insisted on following official policy instructions, while

researchers in the region pointed to their many incoherencies and navigated based on what was feasible on the ground.

An interesting moment in our collaboration occurred when we obtained research funding from the Belgian National Research Fund, and the team coordinators had to solicit ethical clearance from an ethical committee based in Belgium. The team had to guarantee a minimised risk of virus propagation among research participants in accordance with the do-no-harm principle. However, several of our locally embedded team members noted the impossibility of using masks or disinfectant in the field (various informal discussions during Phase 1). They relayed that rural populations might interpret the appearance of a researcher with a mask as ‘completely ridiculous’ or even as ‘an insult’. Many rural populations were deeply unhappy with the anti-COVID measures that ‘the city’ (referring to national politicians) or ‘the West’ (referring to international guidelines) had imposed. During a joint discussion in 2020, one researcher mentioned that they risked being sent away if they appeared with a mask. Another added that he could even be attacked by the research participants. These experiences on the ground were extensively cited throughout the ethical clearance procedure and helped the research team work out an ethical protocol that could reconcile standard ethical guidelines with the complexities on the ground. We also used a WhatsApp group to provide instant feedback when any of our team members were confronted with ethical dilemmas in the field.

Finally, locally embedded researchers’ voices were indispensable in enriching the data analyses. Indeed, relevant data are not limited to the words people share – they also include the broader context in which they are shared and the body language people employ while talking (Fujii, 2017). Our team often realised how, despite very frequent exchanges on research data, the team members based in Belgium had missed crucial aspects of the analysis. A continuous back and forth between the researchers was essential to develop sound interpretations of complex field material. As one researcher who was located in both Belgium and the Congo during the pandemic explained:

I think the bulk of the work has been done by the local researchers and that should be visible in the deliverables. This crisis has further demonstrated that local researchers are important actors in research. Rightly recognising their role can only be beneficial for research. Personally, having been on both sides of the spectrum allowed me to understand the pivotal role of local researchers and the limits of research from a distance (by proxy). (Personal testimony of our team member, July 2021, Phase 2)

We invited all the research collaborators to participate as authors in joint publications to honour the entire team’s commitment and complementary roles. We also guaranteed each locally embedded researcher ownership over their collected research data. We agree with Bouka (2018) that ‘the failure to acknowledge the intellectual property of non-Western scholars during collaborative research is not only unethical, but it also constitutes a violent act’.

Vulnerability

Locally embedded researchers in the region are used to working under harsh circumstances. Crises – geopolitical conflict and war, climatic instability with drought, flooding,

volcanic eruptions, and sanitary problems resulting in outbreaks of Ebola, cholera, and malaria – are part of everyday life. Our research participants indicated that COVID-19's effects did not outpace other crises; on the contrary, it allowed for research on the multiple and interconnected nature of crises (see, e.g., Nyenyezi et al., 2021). However, the gathered testimonies also revealed how the risks and vulnerabilities were not evenly distributed among partners from the Global South and North.

First of all, even though field research was possible, it was far from easy. Ethical, methodological and emotional challenges presented themselves to those working on the ground. For example, a locally embedded researcher-journalist from the DRC declared:

The meetings on the ground had to gather several people. COVID pushed us to split up meetings into small groups of 5 or 6 persons instead of 20. This exercise required the mobilisation of a lot of energy, financial means and time. Ethical principles were certainly not affected (not breached), but the methodology was (affected and continuously adapted). From an emotional point of view, human interactions with certain community members and interviewees were amputated. I couldn't embrace or greet them (appropriately) when we met. (Personal testimony of a Congolese researcher, July 2021)

Another respondent explained:

Research in the context of COVID-19 has (presented us with particular challenges) in comparison to (previous situations in which we navigated through) contexts of war, communal conflict, poverty and other epidemics. Data collection was very difficult because of the social distancing measures. Limiting the number of participants in group meetings meant that the number of discussion sessions had to be multiplied. The consequences of this measure had an impact on our budget, on the timing of the research, but also on the physical exhaustion of the researcher. Similarly, the wearing of masks negatively affected our comprehension of research participants and greatly affected the fluidity of our exchanges. Likewise, the closure of public services and certain institutions – or a reduction in their operational modus – made it difficult to access certain resource persons. (Personal testimony of a Congolese researcher working in Kenya, June 2021)

Researchers are worried about the health risks of navigating in the field. As one of our interlocutors highlighted:

We often found ourselves in situations where we were forced to expose ourselves to the risk of contamination with the COVID-19 disease by ignoring sanitary measures. Often, when we went to the villages wearing a mask, we were very badly perceived. Some peasants suspected us of being ill and of bringing the disease from the city to the countryside. Others, looking at us (while we were wearing our masks), thought that we suspected them of being sick and that as a precaution we covered ourselves out of fear of being contaminated. So we met people who (were very suspicious of us) and refused to approach us or talk to us. It was later that we understood that they were suspicious of people wearing masks. In order to avoid causing controversy, we had to ignore the sanitary measures and act as if nothing was happening. (And so, we) conducted interviews without a mask, we shook hands with research participants to say hello or

goodbye, etc. We were aware of the risks we were running, but for research we could not do otherwise. (Personal testimony of our team member, September 2021)

Moreover, the COVID-19 crisis could not be isolated from the other ongoing crises and risks that locally embedded researchers face (see also Nyenyezi, 2020). In fact, as one researcher in the DRC pointed out, ‘in a context where security, economic, political and environmental crises coexist; COVID-19 only (further) complicated the problems of research’ (joint team meeting, April 2022, Phase 4). Locally embedded researchers testified to how COVID-19 interacted with other crises, and intensified problems of poverty, conflicts over resources, and pre-existing conflicts. Some were frustrated that COVID-19 absorbed so much global attention worldwide, while many other crises were ignored. When reflecting on what it meant to be a researcher, one of our team researchers explained,

This period also illustrated the disconnection between the worlds of the elites and the rural world. The mobility cut between town and country has, for example, limited the possibilities of contact. This can generate the impression for people living in the countryside that the elites (including scientists) only come when everything is ok; and that if not, they hide in their ivory tower. Being present as a researcher in the field – also in times of crisis – is very important in committed research projects. (joint team meeting, April 2022)

In some South–North collaborations, locally embedded researchers perceive little or no space to discuss the complex challenges faced in the field with their partners in the Global North. As a Congolese researcher explained,

During (the) COVID (pandemic), I worked on research on (topic) in Eastern DRC. I had to travel and meet people for interviews and focus groups. Mobility was very difficult, and once on the ground, the restrictions imposed by social distancing measures made logistics complicated. The methodology had to be adapted, the number of people taking part in the focus groups was reduced, and some interviews were carried out by telephone. We faced difficulties to meet up with the heads of the international NGOs and (international) agencies (who had commissioned the research), given that most had been repatriated to their homes due to COVID. At the same time, there was a gap between the members of the team, (as we) did not have the same understanding of the research object since the main researcher was in Europe and only two local researchers were able to do the field. It must also be said that beyond the stress in relation to deadlines and difficulties of meeting interview respondents, the uncertain health situation and demoralising information found on social networks played a major role in the emotional and psychological state of the researchers and thus affected the proper conduct of the research. (Personal testimony of a Congolese researcher, September 2021)

The (perceived) lack of space to discuss personal or contextual complications during field research even pushed some researchers to go into the field while being contaminated with COVID.⁷ After one researcher tested positive, he took some rest but still had COVID symptoms when he had to take up research again. Before going into the field, he decided to take another test at the Congolese border. However, on that day, the test centre did not dispose of the necessary reagent fluid, and everyone tested negative. He did not feel

empowered to inform the research contractor about the impossibility of going into the field without the documentation of a positive test result. He conducted the research while struggling with fatigue and COVID symptoms (Personal testimony of a Congolese researcher, joint team meeting, April 2022).

Another researcher went into the field after being diagnosed with COVID because he did not feel like he could explain this to the (distant) project coordinator:

Especially when you're new. (The coordinator) doesn't know me. He can google me and find out what I do. But then, (when I fall sick), I imagine how he'll think "was he unable to do this job?" (...) If you're already further along (in the collaboration), he'll know, "ah, his work is about that. That's his thing. And besides, he has a good reputation. He's worked with (person A) and with (person B)" But that's what junior researchers don't have. (...) There is so much talent that exists. Real talent. But if you (referring to researchers from the Global North) come across this guy who by misfortune came, and from the first activity, baf, sick, five months? Serious? It ruins everything. It's easy when people know each other. But when people don't know each other, it's a disaster for the guy who got sick. And that was my fear. (Personal testimony of a Congolese researcher, joint team meeting, April 2022)

Even in our own project, some of the researchers did not share COVID-19-related health challenges with the research coordinators. Our researchers did not go into the field while sick, but at least two of them were sick while analysing the results. They only felt comfortable enough to openly discuss this during our joint face-to-face team meeting addressing the challenges of research during COVID-19 in April 2022. One of them shared:

I also got sick. I couldn't even use my computer. And I had two articles that I had to hand in so that by the time you (addressing the project coordinator) would come, there would be something. Fortunately, the deadline was rescheduled (actually as the result of health problems of the projects' coordinators), and allowed me to recover a bit. He continued explaining how worried he was about not having delivered an analysis of good quality, adding how "I think that this is a reality, especially for junior researchers". Junior researchers don't have this possibility of negotiating agendas (with project coordinators in the North). (Personal testimony of a Congolese researcher, joint team meeting, April 2022, Phase 4)

During this meeting in April 2022, we realised that certain dimensions had remained unstated in our collective encounters. With time and many discussions, we collectively developed more space to talk about ethical and emotional challenges. All the team members believed these were crucial in developing the individual and collective resilience needed to respond to the many challenges of research. Four researchers also mentioned that the 'rather horizontal, less hierarchical' relationship with the coordinators located in the Global North was an important aspect of the collaboration. The researchers felt supported as a team through the WhatsApp and online discussions, the many shared jokes, and the friendships that developed through the professional lines of collaboration (Joint team meeting, April 2022, Phase 4). Yet, we also realised that, despite our efforts, the power imbalance between researchers in the Global North and the Global South as well as among researchers from the Global South continued to influence the (perceived) space to talk openly about health problems within our team. We collectively reflected on

how we might move beyond such constraints (and the challenges of doing so). Three elements were highlighted as key in doing so.

First, we identified the importance of continually creating spaces to talk about the ethical and emotional challenges of research, including informal and formal opportunities to interact in the group and one-on-one. Secondly, three members of the group reiterated that we must never underestimate the impact of power relations on what group members feel free to share or not share, regardless of any initiatives to create space for discussion. The terms of collaboration are anchored in a colonial heritage that continues to shape our imaginaries of what is possible. Recognising this is key. Thirdly, the researchers emphatically noted the importance of long-term collaborations. A long-term perspective helps to build the trust needed for team members to share their vulnerabilities, including challenges they encounter in their research.

Conclusion: Turning the tables or business as usual?

The COVID-19 period deeply influenced the evolution of North–South research partnerships. This article considered how locally embedded scholars reflect on their research experiences and involvement with North–South collaborations throughout the COVID-19 pandemic. In this conclusion, we review the four main lessons for North–South collaborations.

The first important lesson is that Western reference patterns still dominate the conditions of international knowledge production. In the early phases of the pandemic, numerous Western voices (nearly all distanced from the field) warned of disaster in sub-Saharan Africa. There was little recognition of African voices who were actually embedded within the field. In most Western societies, the crisis remains an exceptional situation; many opinion makers simply failed to grasp the possibility that a global health crisis could hit the Western world harder than ‘poor’ countries in the Global South. The spectacular reorienting of research funding towards health topics and the centrality of COVID-19 in many global research initiatives often neglected the importance of other interconnected crises that were more damaging to countries in the Global South. It is crucial to question the centrality of Western reference frames in the architecture of global funding and methodological research standards. We must adopt procedures to equalise these power relations in favour of Southern-based scholarship.

Second, the COVID-19 pandemic clearly illustrated how a global crisis hits regions, countries and continents in diverse ways. Locally embedded research is key to understanding on-the-ground dynamics. Only researchers with physical access to the field can elucidate complexities in the data collection phase. In fact, the presence of locally embedded researchers is key in every phase of research, from conception to analysis and restitution. They must be equal partners and should be invited ‘to the table’ throughout any North–South partnership research cycle.

As the testimonies illustrated, researchers’ vulnerability is largely dependent on their positionality within North–South partnerships. Most researchers in the Global North have formal contracts and a multiple-year perspective, while researchers in the Global South often work on temporary contracts. They also face more pronounced risks than their Northern counterparts, given that they often navigate in potentially unstable settings. Many of the researchers who provided testimonies for this paper had to find the right

balance between exposing themselves to health risks (alongside other calamities due to increased poverty and frustration) and having access to an income opportunity. North–South research collaborations should explicitly create space for scholars from the Global South to voice their concerns about these dilemmas. There should also be safety nets to give locally embedded researchers the option to (temporarily) halt their fieldwork.

Fourth, the international scientific community has shown great resilience in coping with the reduced mobility of scholars worldwide. Interestingly, this brought new opportunities for scholars in the Global South who could fully participate in online seminars, conferences, and research platforms. Now, as mobility options increase, the scientific community should remember that scholars from the Global South still face huge barriers to international mobility. While mobility from the Global North to the Global South is again self-evident, the other direction is marked by complex procedures and invasive immigration laws. Thus, researchers from the Global North often travel to the South to ‘kick-start’, ‘coordinate’, ‘wrap up’ or ‘evaluate’ a research project. As a result, the positionality of locally embedded researchers is predetermined by the agendas and availability of those who come from the Global North (Alom, 2018; Parker and Kingori, 2016). The global scientific community should lobby to remove these barriers. And, regardless of whether they can travel, researchers from the Global South must be allowed to participate in global scientific life.

These four recommendations help us to explicitly acknowledge and move beyond the neo-colonial heritage embedded within the normative frameworks and organisational modalities of the academic world. They help guide us in creating more equitable research partnerships that allow North–South and South–North perspectives to be mutually exchanged.

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ORCID iD

An Ansoms  <https://orcid.org/0000-0001-9553-0263>

Notes

1. The terms "Global North" and "Global South" are used to describe two broad socio-economic and geopolitical divisions. Countries from the global North are generally located in North America and Europe; whereas countries in the global South are predominantly located in Africa, Asia, Latin America, and the Caribbean. In this article, we particularly focus on the relationships between Western Europe and Central Africa.

2. See for example the mobility charter of UCLouvain, the Belgian university that hosts the project in which the authors of this article collaborate: <https://uclouvain.be/fr/decouvrir/universite-transition/mobilite-internationale.html>.
3. All materials are available through open access on <https://oer.uclouvain.be/jspui/handle/20.500.12279/646>.
4. All citations in the text below have left out any element (name and context) that could lead to the identification of the research respondent. None of the interviews were recorded.
5. A sandwich scholarship is a term used in Belgian inter-university cooperation to refer to a principle of co-funding for PhD trajectories of candidates from the global South. In many cases, the scholar in question receives a Belgian PhD scholarship of two to three years instead of the standard four years; whereas the partner institution is assumed to cover for the remaining period. However, in practice, many partner institutions in the Global South do not dispose of similar scholarship systems. In that case, the scholar is obliged to cover his salary through teaching or consultancy work; which limits time for research activities.
6. This was also the case in our own team. Regardless of how much we tried to equilibrate power relations within the team, the inherent injustice of offering short-term contracts to locally embedded researchers could not be avoided due to a lack of funding for longer-term perspectives. Also the reorganisation within the team between the first phase (concentrating on cities in all three countries) and the second phase (focusing upon the countryside, but only in regions around the lakes), with the exit of some and the entry of other team members, illustrated how power relations remained skewed.
7. The following two testimonies refer to other research projects that involved certain members of our team.

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Author biographies

An Ansoms is Professor in Social Sciences at UCLouvain (Belgium). She coordinates a research group on rural transformations in Central and Eastern Africa, involved in interdisciplinary research on climate change and natural resource conflicts. She is also an expert on ethical and emotional dilemmas in difficult research fields.

Anuarite Bashizi is a postdoctoral researcher at UCLouvain at the University of Antwerp (Belgium). An economist and PhD in political and social sciences, she specializes in ecological transition and environmental and territorial conflicts in the mining sector in the DRC. She also works compounded crises in rural areas of the Great Lakes region in Africa.

Romuald Adili Amani is an independent researcher who works for local and international organizations based in Goma, in the eastern North Kivu province of the Democratic Republic of Congo. He has studied philosophy and public health. Romuald's research interests concentrate on peace-building, public health and contemplative practices.

Joel Baraka Akilimali is a post-doctoral researcher at UCLouvain (Belgium). He holds a PhD in political and social sciences (UCLouvain), and various degrees in Development Studies, Administration, and Law. His current research focuses on Governance of hybrid religious patrimonies.

Lionel Bisimwa Matabaro is a PhD student at the University of Mons, in Belgium. He holds a Master on Biodiversity Sustainable Management from the University of Kisangani (DRC). His research focuses on the polycrisis context, nature conservation and environmental autochthonous justice in the DRC.

Parfait Kanningu Bushenyula is a Master student in Transitions and social innovation at the University of Mons (Belgium). He received his Bachelor in rural development from the Institute of Rural Development of Bukavu (DRC). His research focuses on peasantry, conflicts over natural resources, especially water, and armed conflict.

David Mutabesha is a researcher at ISDR-Bukavu, and currently undertaking a Master in socio-anthropology at UCLouvain (Belgium). He received his Bachelor in rural development from the Institute of Rural Development of Bukavu (DRC). His research focuses on political ecology, environmental justice and development cooperation in Africa's great lakes.

Sylvie Bashizi Nabintu is a Master student in the Department of Gender and Territorial Governance at the Institute of Rural Development of Bukavu (DRC). Her research focuses on gender, conflicts and climate change.

Guillaume Ndayikengurutse is Professor in the Department of Political Science and International Relations at the University of Burundi. He holds a PhD in Political and Social Sciences from the University of Namur (Belgium). His research focuses on issues of governance, civil society, democratisation and peace-building in post-conflict contexts.

Joseph Nsabimana is a specialist in irrigation schemes and water management, with extensive experience in agricultural development projects in Rwanda. He holds a Master in Development, Environment and Society from UCLouvain (Belgium) and a Bachelor in Agricultural Sciences from the University of Rwanda.

Patient Polepole is a researcher at ISDR-Bukavu, and currently a PhD student at UCLouvain (Belgium). He holds a Master in environmental assessment and audit from the University of Yaoundé 1 (Cameroun) and a Bachelor from the Institute of Rural Development of Bukavu (DRC). His research focuses on land governance, gender, masculinity, customary power, and transformations to sustainability.