



UNIVERSITY OF LEEDS

This is a repository copy of *Valuing trans-disciplinarity: Forum Theatre in Tabasco and Chiapas, Mexico*.

White Rose Research Online URL for this paper:

<https://eprints.whiterose.ac.uk/187427/>

Version: Accepted Version

---

**Article:**

Walsh, A orcid.org/0000-0003-1501-8804, Olvera-Hernandez, S, Mesa-Jurado, MA et al. (4 more authors) (2022) *Valuing trans-disciplinarity: Forum Theatre in Tabasco and Chiapas, Mexico*. *Research in Drama Education: The Journal of Applied Theatre and Performance*. ISSN 1356-9783

<https://doi.org/10.1080/13569783.2022.2083951>

---

© 2022 Informa UK Limited, trading as Taylor & Francis Group. This is an author produced version of an article published in *Research in Drama Education: The Journal of Applied Theatre and Performance*. Uploaded in accordance with the publisher's self-archiving policy.

**Reuse**

Items deposited in White Rose Research Online are protected by copyright, with all rights reserved unless indicated otherwise. They may be downloaded and/or printed for private study, or other acts as permitted by national copyright laws. The publisher or other rights holders may allow further reproduction and re-use of the full text version. This is indicated by the licence information on the White Rose Research Online record for the item.

**Takedown**

If you consider content in White Rose Research Online to be in breach of UK law, please notify us by emailing [eprints@whiterose.ac.uk](mailto:eprints@whiterose.ac.uk) including the URL of the record and the reason for the withdrawal request.



[eprints@whiterose.ac.uk](mailto:eprints@whiterose.ac.uk)  
<https://eprints.whiterose.ac.uk/>

**Valuing trans-disciplinarity: Forum Theatre in Tabasco and Chiapas, Mexico.**

**Research in Drama Education: The Journal of Applied Theatre and Performance**

**Authors:** Aylwyn Walsh, Silvia Olvera-Hernandez, M. Azahara Mesa-Jurado, Alice Borch, Paula Novo, Julia Martin-Ortega, George Holmes.

**Towards knowledge based on dialogue, conflict and rehearsal**

Theatre and performance are often used as a tool in struggle and popular education (Giardina & Denzin, 2011; Madison, 2010). Beyond compelling research on effectiveness of arts interventions, we need transparent accounts of how such collaborations are forged. Dwight Conquergood reminds that there is a dominance of ‘empirical observation and critical analysis from a distanced perspective: “knowing that,” and “knowing about”’ (2002, 146). This suggests a persistent hierarchy of epistemological worth, reinforcing scientific knowledge as meaningful and arts or humanities knowledge as marginal, or merely illustrative (Conquergood, 2002; Lavery, 2016). Research about values in general and specifically about human-nature relationships ought not to replicate taxonomies across socio-cultural contexts, so academic meaning-making dominates over lived experience (Lloro-Bidart & Finewood, 2018; Schultz et al, 2017). Such approaches run the risk of replicating hierarchies of values that correspond with long-standing challenges, injustices, and inequalities. This is particularly the case in the context of environmental governance, specifically related to Payment for Ecosystem Services (PES).<sup>1</sup>

These issues are the context for this academic/local actor partnership that deployed Forum Theatre in rural communities in Mexico. Such pernicious Western and imperial logics are

---

<sup>1</sup> These are initiatives aimed to reach mutually beneficial agreements between providers and users of ecosystem services, entailing a reward mechanism for ecosystem managers for maintaining or improving the provision of the services valued by beneficiaries (Martin-Ortega et al. 2013).

flawed, not least because communities in the Global South do not always valorise the same neat categorisations within their cosmologies (Santos, 2020). Researchers may presume a fixed relationship between findings and identities, in a way that does not always allow for nuanced understandings of how people experience social and economic change. This danger of producing simplistic ‘solutions’ sees communities as homogenous, serving easy political ends, rather than the somewhat more unruly concerns of individuals whose experiences form claims to knowledge (Santos & Meneses, 2020, xxiii). From that perspective, we see the significance of engaging, community-based participatory methods forged with an understanding of research participants as holistic beings whose lifeworlds are embodied, experiential and culturally informed. Our hope is that projects may seek to incorporate ‘novel’ methods to engage participants differently so that results might better reflect the dynamic, emergent, shifting nature of beliefs, attitudes and values (Edwards et al, 2016; Heras et al, 2016; Muhr, 2020). Trans-disciplinarity, understood as the development of integrated knowledge and theory that transcends the academic realm (Tress et al., 2004), therefore emerges as well placed to encompass the multiple dimensions of community-based research within broad contexts of social education about environmental governance. However, such collaborations must find a balance between the processes, methods and analytic imperatives of their informing disciplines. The specific project we discuss brings together environmental social sciences with performance-based Forum Theatre methods from Theatre of the Oppressed (Boal, 1979; 1992; Campbell, 2019). This is a well-known (and contested) form used in many community contexts to explore issues and engage in grassroots education initiatives (Cohen-Cruz, 2005).

We explore this in the collaborative project *Performing Change* on values and environmental decision-making in two rural communities in Chiapas, Mexico. We initially came together in response to engage in impact activities related to an existing years-long

partnership in rural Mexico with local partners and communities who had asked for dialogic activities. The social science colleagues already rooted in the debates and local concerns of Payment for Ecosystem Services invited performance scholars to co-create a one-year project to embed the skills already identified as valuable by the communities. As such, the project design was bottom-up, with most of the research team speaking Spanish, four as a first language, three with extensive prior research in this area, and two who are permanent residents of the area. This correlates with trans-disciplinary approaches where a diversity of knowledges – including non-academic – and values are brought together (Reed, 2008). We do not focus on the outcomes or evaluate findings from our research participants in those communities, as we are interested in the significance offered by trans-disciplinary approaches in which the ‘form’ is not relegated to an illustrative, instrumental agenda for the purposes of indicating scientific knowledge. Specifically, our interest is in the possibilities and limitations of Boal’s Forum Theatre as a methodology to explore values, particularly those which are overlooked or obscured.

Our collaboration invites closer consideration of trans-disciplinary processes through the specific example of our initial project phases. In that sense, this article focuses on the team, the collaborative approach and the methodological potential rather than an evaluative approach of how the intervention ‘succeeded’ or otherwise. That is precisely in order to explore the need for framing research collaborations through explicit attention to values. Indeed, we go on to explore how a trans-disciplinary approach is based on the principle that the integration of other actors in the knowledge production process, in addition to specialist scientific knowledge, results in a ‘final knowledge’ that is anticipated to be greater than the sum of disciplinary components (Martin-Ortega et al. 2015).

The project was conducted in three phases: the first, which is the main focus here, relates to

the conceptualisation of training in Forum Theatre (with 12 trainees, ultimately seven performers) and the development of scenes through a collaborative research-informed script-writing process. Phase two included sharing in communities (about 60 people altogether) and evaluation of the performance using in-depth interviews with about 12 audience members in each place (Olvera-Hernandez et al, forthcoming). The final phase included sharing findings with policymakers using the insights from the communities. For the purpose of this argument, we focused on the first phase and some aspects of the second phase.

### *Epistemologies of 'value'*

It is important to parse the critical considerations about trans-disciplinarity to conceptualise the value of collaboration to make ourselves aware of our own positions within epistemologies and praxis. This helps overcome problems, enabling researchers to enter the field with an increased ability to let the process grow and take shape outside extant hierarchies. Such considerations are a significant part of the trans-disciplinary approach, which, according to Julia Klein:

transcends disciplinary boundaries to create something new that becomes greater than the sum of its parts; it raises new questions and possibilities that could not have been raised by a single discipline (2010, 15).

Our focus on methodologies asks: how can trans-disciplinary collaborations be forged in such a way that subject knowledge, form and outcomes value the unique positions of each other, rather than instrumentalise? Throughout, the words 'value'/ 'to value' are used in terms of valuing methodology as well in terms of the values people hold which are the focus of the project (boundary object). We thus deploy two notions of values, each of them playing a different role. On the one hand, we have 'value/to value' used in terms of valuing

positions within the collaboration. The central focus is on this ‘valuing’ process. On the other hand, we have the notion of value, which was the thematic focus of Forum scenes (i.e. the value attributions that community members have of nature and the environment: not a central part of the focus of the analysis but an instrument/ object in it).

The notion of value in the thematic basis of Forum Theatre comes from ecological economics: attributions of the human-nature interplay, the value that the communities place in their natural environment. In particular, the theme and content of the project relates to Payment for Ecosystem Services (PES) (introduced in the next section). The main focus here is on the methodology of the trans-disciplinary collaboration, rather than the outcomes of the project (Olvera-Hernandez et al, forthcoming), though there is a need to reference the foundations and common grounds of values that form the context of the collaboration. That is because the methodological significance is strongly bound up with the subject matter itself, and so it becomes necessary to ground the understanding of what we can learn from trans-disciplinary collaboration in terms of this dual sense of values: in terms of the project’s object of study, values that are visible or marginalised in the field and secondly, our main focus, the values of trans-disciplinarity.

### **The collaboration context: Payment for Ecosystem Services**

The collaboration took place in the context of a research project aimed at exploring the issues of Payment for Ecosystem Services (PES) and its role in environmental governance in rural communities of the Global South. Issues related specifically to a lack of representation of local people and their values in environmental decision-making. The object of that research sits within the realm of ecological economics, which is in itself an interdisciplinary environmental social science (Martinez-Alier & Muradian, 2015). Ecosystem Services is a common and powerful paradigm for framing environmental research. Originally a means of

raising awareness for biodiversity losses by emphasising the benefits that nature provides to society, Ecosystem Services-based approaches represent an anthropocentric and instrumental conceptualization of human-nature relationships (Gómez-Baggethun et al., 2010; Kallis et al, 2013). Payment for Ecosystem Services initiatives aim to reward ecosystem managers for maintaining or improving the provision of the ecosystem services. They are said to offer alternative livelihoods for local communities, making payments to farmers in compensation for changed management practices (Martin-Ortega, 2013). The ever more rapid popularization of this concept raises increasing concern about the possibility that it might translate into a fundamental change of those relationships, one that risks converting nature into a tradable commodity, crowding-out non utilitarian motivations for nature conservation and shifting social values and relations (Gómez-Baggethun & Ruiz-Perez, 2011; Kenter et al 2015; 2016a; 2016b; Martin-Ortega et al., 2019). Ecosystem Services approaches tend to use quantitative methods, based on categories and concepts defined by (predominantly western, economics-trained) researchers, which are not always well suited to picking up these alternative framings of nature's values.

Within anthropocentric framings, there is a strong risk that certain views and values, belonging to particular groups in society, are prioritised over others (Morales & Harris, 2014). Environmental governance and how it plays out in practice (at a particular time and place) is fundamentally determined by the value judgments of all those involved (Martin-Ortega et al., 2019). In this respect, there is increasing consensus that trans-disciplinary approaches that actively engage with citizens are needed to address complex socio-ecological problems (Holzner et al., 2018). In the context of this inquiry, we use Forum Theatre as a 'novel' trans-disciplinary method to uncover obscured ways of framing nature's value and decisions over the environment.

This project was preceded by long-standing research collaboration between environmental social scientists in the Sustainability Research Institute at the University of Leeds in the United Kingdom, the Trans-disciplinary Laboratory for Sustainability (LATSU) at El Colegio de la Frontera Sur (ECOSUR in Mexico), and Scotland's Rural College (SRUC, also in the United Kingdom). Although the existing collaborators had trialled Forum Theatre approaches as a one-off experience in that prior work (Martin-Ortega et al, 2019), for this year-long collaboration, the colleagues approached theatre practitioner/ scholars able to specifically engage with Forum Theatre methods, to train local performers based in Villahermosa, Tabasco and to embed the learning within the communities rather than hire external (metropolitan) elites to deliver a predetermined outcome to the communities. Before the activities were developed in the communities, the research team sought consent from local communities (mainly local leaders/ *comisarios ejidales*) following traditional local procedures.

There was a further compelling reason for the capacity-building training to be conducted in this way, recommended by the local team members, noting that Chiapas and Tabasco share similar environmental conflicts because the Grijalva-Usumacinta basin administratively includes these states., Chiapas has some areas well served by international artistic practice, while neighbouring states (like Tabasco) do not enjoy the same access to international funding and creative opportunities. In addition, there was a sense that capacity-building needs to be undertaken with potential to deepen the opportunities rather than to replicate the 'parachute' model of much international/ development funding which can seemingly drop in and offer goods and then leave with no sustainable connection between communities and interventionists. The result of these choices is that we were able to support 12 trainees with seven paid roles in delivering the practice alongside the potential for re-engagement in future activities in other areas. Our trainee performers comprised a diverse group presently

based in Tabasco, including from a rural community in Chiapas and two *Zoque ethnias* from Oxolotan (a rural community in Tabasco) with a long-standing experience working with indigenous theatre across Mexico. As such, although they are not precisely the same community as the *spectators*, the capacity-building dimension of the local partner ECOSUR meant that there were more opportunities to deepen the experience and access to the learning about the content to better support performers in the Forum Theatre model. The collaboration sought to destabilise the originary hierarchies of methods and epistemological assumptions that can render qualitative, participatory, emergent, and embodied methods somehow subsidiary to scientific epistemological approaches that disseminate findings. We return to the specific learning from the project activity, but first, we outline the methodological and thematic terrains of the project.

### **Performance in social learning and environmental governance**

The need for social learning identifies the importance of reaching different audiences by engaging participatory approaches that can involve people most affected by the issues at stake (Pahl-Wostl, 2009; Pilch-Ortega, 2016; Reid, 2011; Schaefer, 2012; Singh, 2013). Participatory approaches implemented in the realm of environmental governance to capture a broader range of values of nature, however, fail to elicit and integrate the diversity of ways in which people conceptualize and appreciate nature which are often neglected by purely scientific procedures (Hensler et al., 2021; Muhr & García-Llorente, 2020).

By contrast, the particular value of arts-based methods is that they can form different connecting points to bridge new understandings and perspectives, taking what Sullivan and Lloyd refer to as the ‘complex social jigsaw’ (2006, 642) of issues related to conflict and the environment. Using arts approaches (performance in particular) can make available what Conquergood defines as complex meanings that are “embodied, tacit, intoned, gestured,

improvised, coexperienced, covert’ (2002, 146). It may be relevant to note our use of Conquergood here relates to the methodological imperatives of value, not to yoke his emancipatory practices to Boal’s, as different as they are (cf. Conquergood, 1988). By concentrating on the project’s methodology, we attend to the implications of dialogue, a focus on conflict and the importance of ‘rehearsal for real life’ (Boal, 1992). We consider the issues of participatory methods, power dynamics, dialogue in action, as well as the team’s approach to values of trans-disciplinarity that informed how we worked in the communities in El Pirú and Galacia, Chiapas, Mexico.

### ***Project context: Chiapas and Tabasco***

El Pirú and Galacia, the rural communities where we worked, are located in the Lacandon Rainforest region, a cross-border area with Guatemala. This region has broad biodiversity and biocultural heritage while at the same time presenting a high marginalization rate. During the past century, uncontrolled timber extraction, land colonization processes resulting from land reforms in the 70s, and, more recently, the expansion of the agricultural frontier due to livestock farming and palm oil plantations, have led to high deforestation rates and environmental degradation. The communities are in the buffer area of the Biosphere Reserve *Montes Azules*, one of the most important remaining humid tropical rainforests of Mesoamerica (300,000 ha). People’s livelihoods depend mainly on agricultural activities, subsistence farming, nature conservation activities and, in the last decade, on various ecotourism initiatives promoted by several civil associations working in the area. As in other rural contexts in the country, there is a high dependence on government support programmes. The land tenure of both communities is called *ejido*.<sup>2</sup> Decision-making regarding the *ejido* takes place in the assembly where people with property rights

---

<sup>2</sup> Legal form of land tenancy derived from the Mexican Revolution, a mix of communal and private property rights.

(*ejidatarios*), mainly men, have a vote.

### ***Methodological significance in trans-disciplinary research***

In order to frame our understandings as they emerged in the project, we outline three methodological values that we see as inherent to performance approaches ( table 1). We go on to explore how these are evident in some extracts from the Forum Theatre scenes. This structure enables a conceptualization of the work of trans-disciplinary collaboration rather than obscuring how researchers come to ‘findings’. We see this as a means of exposing the ‘stage management’ of the research in order to better equip researchers embarking on these kinds of collaborations. Our methodological values are 1. Conflict and ‘rehearsal for real life’, 2. Training and negotiation and 3. Translation and adaptation.

In table 1 we express the methodological claims discussed in the article in terms of epistemological plurality that Santos (2020) reminds as central to an expanded understanding of knowing.

**Table 1: Trans-disciplinarity and Epistemological Plurality**

<p><b>Methodological value 1</b></p> <p>Forum means proximity to ‘real-world’ issues or concerns.</p>	<p><b>Conflict and ‘rehearsal for real life’</b></p> <ul style="list-style-type: none"> <li>• Forum scenes are specific to the context.</li> <li>• Forum scenes can open up deliberation via the fictional frame and present conflict as an inciting moment for different perspectives to rehearse alternative outcomes.</li> <li>• The learning for trans-disciplinary researchers is in the relational, spontaneous and embodied performances or contributions from <i>spectators</i> that speak to the wider trends in the ‘research problem’.</li> </ul>
---	--

<p><b>Methodological value 2</b></p> <p>Pedagogy builds local capacity and expands trans-disciplinary impact</p>	<p><b>Training and processes of negotiation</b></p> <ul style="list-style-type: none"> <li>● Supporting local artist/ participants and build capacity through training signals ‘real world’ experience from similar backgrounds.</li> <li>● The processes between team members, script drafting and training script refinement valorises the wide spectrum of expertise across the project (with an emphasis on local lived experience).</li> <li>● Attempts to negotiate in non-hierarchical ways are across epistemological backgrounds and experience (performers/ team members/ community members).</li> </ul>
<p><b>Methodological value 3</b></p> <p>Trans-disciplinarity requires translation</p>	<p><b>Translation/ adaptation</b></p> <ul style="list-style-type: none"> <li>● Moving beyond the binary requires a process of translation: emergent vs complete; process vs product; arts vs science.</li> <li>● Translation happens in different moments across cultural expertise, language and knowledge paradigms.</li> <li>● Local ways of knowing are privileged in the process in terms of content, social significance and language, with early translation of the materials to Spanish.</li> <li>● Generating critical awareness of the issues of translation remains significant throughout the project delivery and analysis.</li> </ul>

***Methodological Value 1: Forum theatre, conflict and ‘rehearsal for real life’***

The longstanding practitioner of Theatre of the Oppressed, Ali Campbell, says that Augusto Boal's methods 'align the judgments of the head with the assertions of the heart' (2019: 10). For Campbell, Theatre of the Oppressed, and particularly Forum Theatre are practiced, rehearsed, and proceed in the *doing*. The method has been used in multiple trans-disciplinary collaborations including environmental education (Sullivan & Lloyd, 2006), farm-workers' rights (Cohen-Cruz, 2005), as well as in response to local issues such as inter-ethnic conflicts (Campbell, 2019). In the model, there is a trained company of performers who present a scene, introduced by what Boal terms a 'Joker', who opens up the stage to dialogue and intervention (1992). The scene must balance between didacticism and desire to change an oppressive condition, according to Campbell, with the critical role of the Joker as 'crafting enquiry' (2019). Boal names the communities that attend Forum Theatre *spectactors* because he envisages an audience that moves from passive recipients of performed scenes to actively getting involved in changing meanings, outcomes and imagining future potential. In other words, the key ontological position of the Forum Theatre is 'rehearsal for real life'.

The Forum model is itself a pedagogy, as Jan Cohen-Cruz announces, in which Boal translates Paulo Freire's *Pedagogy of the Oppressed* into Theatre of the Oppressed. It is, she says,

'an example of the emergence of new knowledge out of people's experience. Boal moved from agitprop, a form of theatre that tells audiences what they should do, to Forum Theatre, a story-based approach that engages audiences in discussions about what they want to do' (2005, 139).



Image 1: screen grab from the film documenting the visits to communities (Water@Leeds, 2021)

Forum Theatre mirrors what Freire (1993) sees as the need for oppressed communities to ‘step outside the apparently solid ‘matrix’ of ‘this time in this place’ and collectively codify the ‘myth of fixed reality’ (Sullivan & Lloyd, 2006, 642) in a process that can build hope for transformation. Campbell (2019) demonstrates that, as in all dialogues, these practices must emerge over time, and they are not emancipatory methods that can claim meaningful change immediately. Rather, the approach relies on proximity to lived experience. Jan Cohen-Cruz says this is because ‘personal stories position even the least powerful individual in the subject position, the I, since everyone is an expert on his or her own life’ (Cohen-Cruz, 2005, 129). It is in the specificity of engaging in this active participation of trying alternatives, embracing the ethos of ‘rehearsal for real life’ that communities are attending to what could be different. The unique format of Forum enables them to reflect differently on the situations and conditions that form oppressive structures, and they, in role or in the active *spectator* position, can attempt taking up different perspectives. The very dilemma inherent to values as a theme of inquiry is thus opened up productively: deeply-held views that might otherwise remain taboo, or unquestioned, can be explored via a framing of fiction that enables a sharper critique than if someone must respond from their own position, as in

focus groups, or semi-structured interviews. It also allows for the emergence of collective deliberation as *spectators* engage with the multiple possibilities that emerge in conflict, perhaps allowing for a more nuanced exploration of conflict. This is particularly valuable when engaging with themes around values, where awareness and willingness to articulate values may be well-rehearsed (and thus repeating standard messaging) or tacit (and thus not verbalised explicitly).

Perhaps the most pressing consideration in Forum Theatre is that meaning-making is relational and dialogic. It is therefore a viable means of entering into community conversations about any social concerns. Wallace Heim sees conflict ‘as a mode of meaning making’ (2016, 295), saying that ‘conflict, itself, can force an articulation of values’ (2016, 295). In the Forum model, given that it is framed by a fictional scenario, we are not talking about *real* conflict, but conflict that touches on the pressing issues to be discussed and deliberated. In that sense, the fictional model allows a productive way to present several layers of meaning that can draw out questions of power dynamics, ambitions, interpersonal issues, thwarted dreams or prejudices that go alongside the main concern with values. Carl Lavery, on the significance of theatre as an interventionist approach in environmental debates, says:

the ecological charge of theatre is not [...]in what it represents but in its ability to disclose multiple ways of being in time that escape unhelpful binaries between ‘nature’ and history, human and ‘non-human’ and fast and slow (2016, 314).

Performance methodologies can forge new understandings beyond the simplistic agit-prop or didactic approaches which are top-down. Established projects working through Forum Theatre recognise that:

the struggle for environmental justice involves a delicate and usually skewed power dynamic pitting process democracy and reliance on local knowledge and personal testimony that characterize community activism against the rationalist methodology of science, below-the-radar political agendas [...], and the cost-benefit economics (Sullivan & Lloyd, 2006, 628).

This is an important perspective that signals that researchers ought to reflect where power dynamics, epistemological approaches and existing movements come together to produce what will be mutually meaningful for projects and communities.

### ***Methodological value 2: Training and processes of negotiation***

What emerged during the rehearsal phase is that the performers were concerned they would somehow 'offend' the local community if they were not measured in their performance (by avoiding caricatures and stereotypes, maintaining a respectful attitude). The performers anticipated the proximity of the *spectators* to their representations. In their development of the Forum scenes, the characters' dilemmas needed to be measured against scientific accuracy, artistic value and being accurate and respectful towards communities. As such, the script became a starting point for these discussions, rather than, as it most often is, a final product.

The performers were selected through a call made by direct contacts from the state of Tabasco, where one of the institutions participating in the project is located. Based on the profiles required for the characters in the script, a first selection of people who were willing to attend the training and travel to the remote rural communities was made. Among the performers were several people working in peasant community theatre with strong links to the rural lifestyle, as well as other people who have a background in theatre but combine it with other primary professional activities (theatre is a vocation or secondary activity for

them). A four-day workshop was held to train the performers in Forum Theatre and to reflect with them on the script and the characters. Subsequently a casting was held to select those who would implement Forum Theatre in the communities, selecting three men and four women.



Image 2: Screen grab from the performance with several of the characters onstage (water@leeds, 2021).

### ***Methodological value 3: Translation/ adaptation***

Any attempt to explain behaviours in purely rational ways erases context, cultural practice, agency or inter-and intrapersonal tensions and conflicts. We instead need understandings that are framed outside of the self (characters), enabling a means of reflection and recognition (*spectator* questions or provocations), and allowing for the translation of role behaviour (in the Forum).

In international collaborations there is always a literal meaning of translation, given not all team members are Mexican, with five out of seven international colleagues having an existing research connection with the local communities, and only one (the performance

scholar) with no existing background in the theme or context. When transparently deployed, acknowledging limits of academic knowledge and the need for translation can be a powerful mode of engaging and requesting access to understandings that may otherwise remain tacit. It is not always a power-play with English speakers dominating meaning making, and the team were conscious to overturn these tendencies we had experienced in other contexts. Across the team, the local expertise and grounded experience of the scientific researchers was not privileged above the performer/ participants in terms of the final performance. These acts of translation happened across language (English-Spanish/ Spanish-English) as well as across forms of expertise (scientific experts/ experts of lived experience/ initial script writer as non-expert). In this sense, the methodological value of translation attends to what can be legible in the specificities of cultural contexts, not purely mechanical linguistic translation. As a methodological value, this critical consciousness of structure, forms of language itself and specific formulations in the rehearsal script meant that it was a launching point and not a final document to be learned by heart and repeated by performers. Their contributions, additions and experiences enabled the final performed scene to better reflect the experiences of the communities themselves. In terms of the specific remit of Forum Theatre, this is paramount, in order for the conflict to necessitate dialogue.

### **Developing critical engagement with conflict: Scripting as a process of trans-disciplinarity**

In this section we move towards analysis of the various forms of data emerging in this phase : initially, the collaborative dialogues and years of prior research that that forged the script; the training draft of the script; and the understandings emerging in the training sessions.

By definition, the activating scene in Forum Theatre cannot mean everything at the same time, as there have been choices to foreground certain issues - in particular, inciting dialogue

about conflicts that are present in the lived experience of the communities. The script is intended to be provocative so as to highlight issues that need to change; or at least invite new ways of thinking about causes of conflict. We use the Forum Theatre scenarios to consult the audience/ *spectators* about what needs to change and how. The intention of the scenes is that they ought to approximate real life, but not meant to represent specific stories from life. Thus, the scenes need to reflect what could be true at the level of plot and conflict: evident in forms of power, status, decision-making, values and not at the level of character (gender, age or family situation). However, it became clear as we introduced the draft script (in Spanish translation) to the performers that we also needed to modify and adapt to certain cultural circumstances. For instance, initial drafts of the script included scenes of conflict between producers (female) and a male *Comisariado* (chief). The researchers familiar with the location originally commented that many of the decision-makers in the region were actually women, and the focus on characterising the *Comisariado* as a somewhat dismissive and patronising man would not reflect their experiences. However, in rehearsals, a gifted male performer was able to characterise the patriarchal structures that can predominate, and his performance enabled a discussion about gendered expectations and the value of listening to all members of the community. As such, this scene formed a somewhat unexpected opportunity to community members to engage with feelings or experiences of being sidelined or misunderstood.

As explored by Campbell (2019), the Forum scene must enable identification with the conflict or struggle so that *spectators* feel compelled to intervene and rehearse their tactics. This was thus a learning opportunity for the researchers to not foreclose what aspects of dialogue will be the most productive, remaining open to the lived experience and the expertise that is comprised of local ways of knowing.

Doña Ofelia: I'm glad I saw you passing. Comisariado, you are well known for being a fair and considerate man, who takes care of the negotiations of these projects. I am really in need now. You know I'm looking after my niece, and we need more plans for survival.

Comisariado: Yes Doña Ofelia, and how is your husband, and your mother? I hear she's taken a turn for the worse?

Doña Ofelia: Well, thank you for asking, but as I know you are in a hurry, I had an urgent plea to put to you before the next meeting for a project I want to propose. I have heard about the government proposals but I have some other ideas I want to put forward.

Comisariado: You know, I can say yes, but it is not *my* decision. You should bring the problem to the general assembly for wider deliberation and we can hear about it there. Then, the people can vote on it. (extract from English translation of the script, 2019).

In this section that occurs near the beginning of the Forum scene, the power dynamics are set up and note the cultural formalities required in communities. There is a respectfulness to the greeting that reminds of the social hierarchies. From a theatrical perspective, it is also a device to build tension and create conflict as we can see the dismissive patriarch deflecting to the wider meeting as a means of not engaging with Doña Ofelia's appeal for support for her project. She goes on to demonstrate some of the local tensions that have meant she's now struggling to make the most of her land. The scene demonstrates the contradiction between local and external definitions of conservation, in terms of what is valued by the formal Ecosystem Services payments.

Comisariado: ... It is not that I am *against* women's projects but you are very busy at home. I think it is better if we focused on projects that can bring money to the community.... You see, we do not want the children to raise themselves, or the *tamales* to grow *directly* from the ground. *Someone* has to grind the corn. I mean (*clears throat*) you know how much we appreciate your *tamales*! There are some things that are more precious to us -

Doña Ofelia: (*interrupts*) Thank you, sir, but I do not want to discuss my *tamales*, I want to talk about making jam from my mangoes. It is delicious and you know, people want it. But it's difficult to get all the material, you know, pectin, we need to go to the city and I cannot do that.

Comisariado: (*he's preparing to go, putting on his hat again*) I need to think what's best for the whole village, not just one family. Even if I knew your father (RIP). Maybe you can bring some jam to the next meeting? (extract from English translation of the script, 2019).

As the scene progresses, we see there is a tension between the *Comisariado's* 'charming-patriarchy' (Agarwal, 2009) that upholds values related to caring (mostly relegated to women), and the value base that supports conservation. As such, it is a scene that opens up questions of 'authority and subversion' (Singh, 2013). It also brings up the interconnectedness of the modes of production: the mango jams are reliant on travel and logistics for all the ingredients. As such, the scene initiates a dialogue driven by 'charming patriarchy' as well as how daily practices cannot be distinguished from socio-economic circumstances. In the process of drafting and re-drafting this scene, it became clear that the characters' motivations are not single issues. There are complex considerations about change, intentions and effects of behaviour change that come through in this scene. The woman's obligations to her family mean that she cannot take up the existing projects, which

would require additional workers, so the dilemma for this character reflects larger issues about managing gendered assumptions against the desire for a more reliable income.

Doña Ofelia: [...] since I have the mango trees, I should be able to distribute jams, but I have to go to the city to get pectin and I cannot do that myself...But I want them to understand my circumstances. I cannot work like a team of men. I don't promise that. I promise to make delicious jam. (extract from English translation of the script, 2019).

The scene explores the motivations of these characters in depth, shows their own evaluation of their circumstances and their ability to compare them against existing power structures and what is considered the 'common good'. She finds herself in conflict with gendered expectations, capabilities and desires. This scene generated quite some reaction from older women participating in the Forum as they saw themselves reflected in this struggle. It also shows some of the limitations of Payment for Ecosystem Services or conservation programmes which are often seen as win-win in terms of outcomes for society and the environment, however the distribution of benefits (and disbenefits) is rarely equal.

The scenes shifted across different character types to engage the wide range of conflicts prevalent in the understanding of Payments for Ecosystem Services. The methodological work of Forum Theatre is in its capturing of the conflict so that *spectators* feel compelled to intervene. While it is beyond this article's scope to analyse how the gathered communities responded, the various value-laden conflicts stack up in the heightened debate style speech that constituted the final part of the Forum.

Though we needed to position conflict front and centre – without wanting to deliver agit-prop messages about which values the community members *should* hold, we wanted to

explore the multiple and intersectional bases for holding different values in relation to ecosystem services and conservation.

Moral issues move beyond the binaries that are presented in, for instance, in Singh's work on environmentality and forest growing in the context of India (2013). Instead, in the table below (table 2), we consider the particular worth of the Forum Theatre approach in producing the conflict that allows for nuance in how people experience their world and make decisions. This manoeuvre enables the specificity of performance pedagogies to emerge: beyond the simplistic dissemination of fixed 'messages', there is value in staging situated, contextual and intersectional conflict that can reach audiences. It is difficult to put into practice, since some environmental professionals, performers, and participants from the communities were expecting to use the Forum Theatre as a means of teaching the 'correct' or 'best' way to think about issues. Breaking these hierarchies is a process that requires all involved to 'rehearse'. We recognise this question of differing expectations can be perceived as a conflict, and it also draws attention to the dynamics that are endemic to 'development' initiatives which perpetuate top-down approaches that seek defined solutions. Forum Theatre interventions can undo some of the assumptions that others can (or should) dictate the actions of local communities. The role of the reflexive approach to methods is precisely to reveal that conflicts and divergences happen in collaborative research. In single-discipline studies, issues might be expected to 'resolve' in one way, but in trans-disciplinary work, such issues can reveal divergent expectations held by different stakeholders.

What Table 2 shows is the specific opportunity offered by Forum Theatre to shift attention beyond simplistic hierarchies of value, which might otherwise replicate the epistemological value discussed in the opening in which educated/ metropolitan elites disseminate 'correct'

approaches or solutions to the rural communities in ways that neglect their contextual realities.

**Table 2 Forum Theatre: Values and conflict**

<b>Values/ binary expressions from environmental economics</b> (adapted from Singh, 2013)	<b>Shift of attention (or conflict) presented in Forum Theatre methods</b>
authority/ subversion	<ul style="list-style-type: none"> <li>• Allows for interpersonal tension/ conflict.</li> <li>• Enables intersectional dynamics (e.g. gender/ age discrimination/ or other characteristics) to be highlighted.</li> </ul>
care/ harm	<ul style="list-style-type: none"> <li>• Offers insight into how lived experiences articulates these via traditions, access, rights and responsibilities influenced by wider morality (including faith).</li> </ul>
Indigenous-rural/ development	<ul style="list-style-type: none"> <li>• Positions the ‘placed’ nature of conflict as central.</li> <li>• Reflects dynamics and assumptions related to socio-political regimes.</li> <li>• Wider issues of access to resources/ funding allocations and development agendas that lack grounded knowledge.</li> </ul>
sanctity/ degradation	<ul style="list-style-type: none"> <li>• Specific attachments: human-Nature relations and cosmologies held by communities themselves.</li> </ul>

	<ul style="list-style-type: none"> <li>• Not imposed by external naming of certain actions or beliefs (such as by researchers).</li> </ul>
trust/ fear	<ul style="list-style-type: none"> <li>• This can be explored in specific contexts and in multiple directions (e.g., one could be betrayed at the level of one's personal circumstances (gendered discrimination)).</li> </ul>

The *Comisariado* is motivated by conservation, driven by a belief that humans have a responsibility towards the environment and that the community should be stewards. He genuinely wants to preserve the forest, but adopts the idea that for conservation to really work, it has to be aligned with economic development, as opposed to more eco-centric views which promote conservation for the intrinsic values of nature. This signals a worldview prizing the causal mechanisms for conservation, and the pathways by which values and actions translate into results. The character offers a clearly recognizable ideology of 'pragmatic anthropocentrism' (Gómez-Baggethun et al, 2010). For the character, this concept is clear in his arguments emphasising that for conservation to work it needs to sustain local livelihoods (or cannot be at the expense of those livelihoods) and therefore practical (economic tools) so that Payment for Ecosystem Services is a win-win solution. This is where the pragmatism comes in, as despite having a genuine belief that humans are 'stewards' - that this would only work if there are some economic gains - or at least not losses.

Doña Ofelia plays out her participation and strategies, inserting values into the process of decision-making. She represents a complex dynamic between tradition and opposition to the opportunities that are available, in this case, she is pursuing projects that do not fit with

traditional conservation. This helps to emphasise the contradiction between local and external definitions of conservation.



Pic 3 Screen grab from film of Doña Ofelia handing over the apron to *spectator* (water@leeds, 2021).

### **Three methodological tenets of performance in trans-disciplinary research**

In these short script extracts, it is evident that the construction of characters facing obstacles to their aspirations sets up the space for discussions about decision-making. The vital research basis, scientific expertise and lived experience came together in the training of local participants to co-produce a final outcome of Forum Theatre. The starting points for the script were based not only on years of previous research but also through the personal relationships that we (in particular the colleagues based in Mexico) managed to establish with people in the local communities. The resultant tacit, relational knowledge was significant when re-drafting the script (in the iterative, participatory approach led by the local performers). Different disciplinary knowledges (including local expertise) came together to enable the integration and materialization of knowledges. In prior projects, the team was focused on understanding the risks of using an ecosystem services framing (which

only values nature as services that benefit the people), to understand the different values that the communities place in nature. The addition of generating a script with this information and then bringing it back to the communities to refine and present in the model of Forum Theatre was an opportunity for the research team and the communities to progress the dialogue about the plurality of values placed in nature.

In light of more emphasis on trans-disciplinarity in international research funding agendas, we needed to advocate for the careful and attentive application of values from performance all the way through the process, not merely to ‘illustrate’ or exemplify the scientific findings. We make three main methodological claims for performance in a trans-disciplinary approach. Each of them speaks to the appropriate focus for the specific theme or object of study and to consider processes of collaboration. Firstly, the need for grassroots dialogue about specific issues emerges in the scientific research about communities. Forum Theatre was introduced to enable this dialogue in order to work against a hierarchy of knowledge, and the common ‘extractivist’ approach of much research in rural communities that Santos (2020) points out as undermining the epistemic value of plurality forged in the local context’s ‘real-world’ issues or concerns. That means that research-based scripted materials are a starting point that generate further engagement with the local performers to enable richer, more effective understandings of the specific conflicts.

This is particularly important in discussions of ‘value’ can be complex, replete with competing agendas that are compounded by poverty, natural disasters, and concerns about gender. This is a means of researchers learning to value the lived experience of all the stakeholders rather than merely adapting research findings to a script, or illustrating the ‘expert’ knowledge (Klein, 2010). In that sense, there is a clear need for the capacity-building dimension in research design. Trans-disciplinarity thus emerges in our own process,

and Forum Theatre more generally, provides the bringing together of various knowledges, including non-academic.

The final two methodological claims are related to values of trans-disciplinarity and translation. To that end, we are interested in how the use of Forum Theatre enabled a means of capacity building in the team as well as in the community of *spectactors*. Namely, by working explicitly on a form that requires local context, attention to real-world conflict(s), and translation across experience and expertise, the research team faced epistemological differences. These processes are not simple, but a means of learning and communicating the struggles of trans-disciplinarity. We have therefore considered the process of collaborating via Forum Theatre in order to position the value of the unique positions of subject knowledge, form and outcomes, rather than the more prevalent instrumentalization of ‘novel’ methods.

### **Acknowledgements:**

Funded by the Leeds Social Science Institute Impact Acceleration Fund. Thanks to LATSU from ECOSUR, Dr. Miguel Díaz, the filmmaker Marco Giron, and community performers: Oscar, Brindis, Lesvi, Hazael, Mati, Cato, Tavo and Eva.

Ethics approval from the University of Leeds Business, Environment and Social Sciences joint Faculty Research Ethics Committee ref: AREA 19-030.

### **References:**

- Agarwal, B. 2009. Gender and forest conservation: The impact of women’s participation in community forest governance, *Ecological Economics*, 68(11), 2785–2799.
- Boal, A. 1979. *Theatre of the Oppressed*. Transl A. Charles & M.O.L. McBride. London: Pluto.

- Boal, A. 1992. *Games for Actors and Non-Actors*. Transl. A. Jackson. London: Routledge.
- Campbell, A. 2019. *Theatre of the oppressed in practice today: An introduction to the work and principles of Augusto Boal*. London: Methuen.
- Cohen-Cruz, J. 2005. *Local Acts: Community-based Performance in the United States*. New Brunswick: Rutgers University Press.
- Conquergood, D. 1988. Health Theatre in a Hmong Refugee Camp: Performance, Communication, and Culture. *TDR*, 32(3), 174–208.
- Conquergood, D. 1995. Of Caravans and Carnivals: Performance Studies in Motion. *TDR: The Drama Review*, 39(4), 137-41.
- Conquergood, D. 2002. Performance Studies: Interventions and Radical Research. *TDR: The Drama Review*, 46(2), 145–156.
- Edwards, D.M., T, M. Collins, & R. Goto. 2016. An arts-led dialogue to elicit shared, plural and cultural values of ecosystems. *Ecosystem Services*. 21, 319 – 328.
- Freire, P. 1993. *Pedagogy of the Oppressed*, rev. edn. Transl M.B. Ramos. London: Continuum.
- Giardina, M.D. & N.K. Denzin. 2011. Acts of Activism/ Politics of Possibility: Toward a New Performative Cultural Politics. *Cultural Studies & Critical Methodologies*, 11(4), 319-327.
- Gómez-Baggethun, E., R. de Groot, P.L. Lomas, & C. Montes. 2010. The history of ecosystem services in economic theory and practice: From early notions to markets and payment schemes, *Ecological Economics*, 69(6), 1209-1218.
- Gómez-Baggethun, E. & M. Ruiz-Pérez. 2011. Economic valuation and the commodification of ecosystem services, *Progress in Physical Geography: Earth and Environment*, 35(5), 613–628.

- Heddon, D. & S. Mackey. 2012. Environmentalism, performance and applications: Uncertainties and emancipation. *Research in Drama Education: The Journal of Applied Theatre and Performance*. 17(2), 163 – 192.
- Heim, W. 2016. Theatre, conflict and nature. *Green Letters: Studies in Ecocriticism*. 290(3), 290 – 303.
- Hensler, L., J. Merçon, & U. Vilsmaier 2021. Diverse values and a common utopia: Insights from a participatory art-based plural valuation experience in Xalapa, Mexico. *Case Studies in the Environment*, 5(1), 2473-92.
- Heras, M., J.D. Tabara, & A. Meza. 2016. Performing biospheric futures with younger generations: A case in the MAB Reserve of La Sepultura, Mexico. *Ecology and Society*, 21(2), 14.
- Kallis, G., E. Gómez -Baggethun, & C. Zografos. 2013. To value or not to value? That is the question. *Ecological Economics*. 94, 97-105.
- Kenter, J.O., L. O'Brien, N. Hockley et al. 2015. What are shared and social values of ecosystems? *Ecological Economics*. 111, 86-99.
- Kenter, J.O., M. Reed, & I. Fazey. 2016a. The Deliberative Value Formation model. *Ecosystem Services* 21, 194-207.
- Kenter, J.O., N. Jobstvogt, V. Watson, K. Irvine, M. Christie & R. Bryce. 2016b. The impact of information, value-deliberation and group-based decision-making on values for ecosystem services: integrating deliberative monetary valuation and storytelling. *Ecosystem Services* 21, 270–290.
- Klein, J.T. 2010. A taxonomy of interdisciplinarity. In J.T. Klein & C. Mitcham (eds.) *The Oxford Handbook of interdisciplinarity*. Oxford: Oxford University Press, 15-30.
- Lavery, C. 2016. Theatre and time ecology: Deceleration in Stiffters Dinge and L'Effet de Serge. *Green Letters: Studies in Ecocriticism*. 290(3), 304-323.

- Lloro-Bidart, T. & M. Finewood. 2018. Intersectional feminism for the environmental studies and sciences: Looking inward and outward. *Journal of Environmental Studies and Sciences* 8, 142–151.
- Madison, D.S. 2010. *Acts of Activism: Human Rights as Radical Performance*. Cambridge: Cambridge University Press.
- Martin-Ortega, J., Ojea, E., & C. Roux, C. 2013. Payments for Water Ecosystem Services in Latin America: A literature review and conceptual model. *Ecosystem Services*, 6, <https://doi.org/10.1016/j.ecoser.2013.09.008>
- Martin-Ortega, J., A. Perni, L. Jackson-Blake, B.B. Balana, A. Mckee, S. Dunn, R. Helliwell, D. Psaltopoulos, D. Skuras, S. Cooksley, B. Slee 2015. A transdisciplinary approach to the economic analysis of the European Water Framework Directive. *Ecological Economics*. **116**, pp. 34-44.
- Martin-Ortega, J., M.A. Mesa-Jurado, M. Pineda-Vazquez, & P. Novo. 2019. Nature commodification: ‘a necessary evil’? An analysis of the views of environmental professionals on ecosystem services-based approaches, *Ecosystem Services*, 37, 1009-26.
- Martinez-Alier, J. & R. Muradian. (eds). 2015. *Handbook of Ecological Economics*. Cheltenham: Edward Elgar.
- Morales, M.C., & L.M. Harris. 2014. Using subjectivity and emotion to reconsider participatory natural resource management. *World Development*, 64, 703–712.
- Muhr, M.M. & M. García-Llorente. 2020. Beyond words—the potential of arts-based research on human-nature connectedness. *Ecosystems and People*, 16(1), 249–257.
- Olvera-Hernandez, S., M.A. Mesa-Jurado, P. Novo, J. Martin-Ortega, A. Walsh, G. Holmes, & A. Borch. (forthcoming) Forum Theatre as a mechanism to explore representation of local people’s values in environmental governance: A case of study from Chiapas, Mexico. *People and Nature Journal*.
- Pilch-Ortega, A. 2016. Learning and local change in social movements in Chiapas, Mexico. In R. Evans, E. Kurantowicz. & E. Lucio-Villegas (eds.) *Researching and*

- Transforming Adult Learning and Communities: The Local/Global Context*. (177-186). Rotterdam: Sense Publishers.
- Pahl-Wostl, C. 2009. A conceptual framework for analysing adaptive capacity and multi-level learning processes in resource governance regimes. *Global Environmental Change*. 19, 354-365.
- Reed, M.S., 2008. Stakeholder participation for environmental management: A literature review. *Biol. Conserv.* 141, 2417–2431.
- Reid, A. 2011. Environmental education debate. In *Green education: An A-Z guide*, ed. J. Newman (149-55). London: Sage.
- Santos, B.S. 2020. Towards an Aesthetics of the Epistemologies of the Global South: Manifesto in Twenty-Two Theses. In B.S Santos & P. Meneses (eds.) *Knowledges Born in the Struggle: Constructing the Epistemologies of the Global South*. (117-125) London: Routledge.
- Santos, B.S. & P. Meneses (eds.) 2020. *Knowledges Born in the Struggle: Constructing the Epistemologies of the Global South*. London: Routledge.
- Singh, N.M. 2013. The affective labor of growing forests and the becoming of environmental subjects: Rethinking environmentality in Odisha, India. *Geoforum*, 47, 189–198.
- Sullivan, J. & R.S. Lloyd. 2006. The Forum Theatre of Augusto Boal: A Dramatic Model for Dialogue and Community-Based Environmental Science, *Local Environment*, 11(6), 627-646.
- Tress, G., B. Tress, & G. Fry. 2004. Clarifying integrative research concepts in landscape ecology. *Landscape Ecology*, 20(4), 479–493.
- Water@Leeds. 2021. Documentation of Performing Change. Available at: <https://water.leeds.ac.uk/our-missions/mission-2/performing-change/about/>