

## **Standing Out and Blending in: Contact-Based Research, Ethics, and Positionality**

Recent work on research ethics in Political Science has broadened the conversation about ethics training and consciousness beyond the procedural ethics of the IRB process (Fujii 2012; Michelson 2016). This new direction was necessary because the concepts of Respect for Persons, Beneficence, and Justice, which are central to the IRB protocols, are important but insufficient in ensuring ethical conduct in much social science research (Mackenzie, McDowell, and Pittaway 2007).

When the researcher is significantly involved in the data collection through interaction with participants,<sup>1</sup> the ethical considerations involved are ongoing during research implementation and are therefore outside of the scope of the IRB. As such, scholars like Tracey (2012) have called for “situational and relational ethics,” while Guillemin and Gillam (2004) developed the idea of “ethical reflexivity,” both of which are navigated by individual researchers in the process of conducting research. I would like to argue that such situational ethics should also be conditioned by the identity, or positionality, of those conducting research; both identities to which the researcher ascribes, and those that are assigned to them by their interlocutors in contact-based research. Positionality must be considered as part of the ethical landscape because the interactions on which such research is based are imbued with questions of how the researcher presents themselves, and how they are perceived by their interlocutors. The observed or assumed identities of the researcher by their interlocutors shape the kinds of situational ethical dilemmas the researcher must navigate.

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<sup>1</sup> A definition of fieldwork based on Jamal (2020).

While researchers present themselves in their professional capacity, both they and their interlocutors understand their interactions to be raced and gendered, as well as imbued with dynamics of class and other inequalities. Observable or inferred identities, those that can be seen or those that are (rightly or wrongly) assumed by interlocutors, can themselves create ethical sticking points, because of power dynamics, access, trauma, or threat (Fujii 2017).<sup>2</sup> For example, the ethics of a researcher who identifies and is understood as a foreign man conducting research on wartime atrocities including sexual violence are distinct from those of an in-group woman. But subtler issues of researcher positionality also arise in the course of conducting research, in the differences between interviewing people from different identity groups.

This article is an argument in favor of moving the discussion of ethics in political science toward positionality as central to the development and implementation of contact-based research. To do so, I first examine the ways in which Political Science and other disciplines consider positionality and works that specifically interrogate the ideas of “insiders” and “outsiders.” I then examine examples from my own contact-based research over the course of more than a year in South Africa, among populations in which I could blend in, and those in which I immediately stood out, to highlight the ways in which ethical dilemmas are often conditioned by the identity of the implementing researcher. By way of conclusion, I make two central recommendations: first, that ethical training critically interrogate the idea of researcher neutrality in contact-based research and

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<sup>2</sup> For example, a fellow researcher in Durban who identified herself as Puerto Rican, was often assumed by her interlocutors to be white or Coloured (in the South African sense). In this case an observable trait (skin tone) was inferred into a racial grouping to which she did not subscribe.

secondly, that researchers build positionality into their own conception of ethical conduct in advance of project implementation.

### **Positionality and Research**

The discussion of positionality in research is somewhat rare in Political Science (Kapiszewski, Maclean, and Read 2015, 147). When it does happen, the conversations are often in the context of a hybrid discussion of fieldwork practicalities and outcomes, like navigating positionality in creating relationships (Yanow 2009; Aldrich 2009), the practicalities of life in field sites (Schwedler 2006; Ortals and Rincker 2009), or examining the ways that the identities (perceived, revealed, or misperceived) of the researchers affect the data collection process (Chavez 2008; Townsend-Bell 2009). While political scientists have long discussed how, for example, case selection affects research outcomes, more recent discussions of identity and research have turned to the idea that who you are may indeed affect the fieldwork you do, and the answers you get, in both large-N (Adida et al. 2016), and small-N (Fujii 2013; Maclean 2013; Gill and Maclean 2002) research.

Discussions of positionality are often framed in terms of insider/outsider dynamics, and the extent to which the researcher's identities became part of the research process. Some researchers clearly position themselves, and are positioned by their interlocutors, as "outsiders" to the communities that they study (Wedeen 2008; Blee 2003; Lin 2002; Scott 2008; Scoggins 2014). In his pathbreaking ethnography of reindeer herders in Siberia, Vitebsky recounts of his first trip to Yakutsk, "I appeared to be

invisible...a visitor from another world” (2006, 42).<sup>3</sup> Others, by contrast, situate themselves clearly as insiders, and speak to the avenues opened up by their common identities, but also the ways that it constrains their work (Brown 2012; Chavez 2008). The middle-ground between insider and outsider status is occasionally charted in Political Science, as with Cramer’s discussion of her Wisconsin-based identity in The Politics of Resentment, where she both chronicles her own connections with the state (2016, 11), and also the ways in which her research participants saw her as “outside” because she is affiliated with a the University of Wisconsin and lives in a metro area (2016, 39–40).

### **Positionality as Intersubjective, and Ethical Considerations**

The status of “insider” versus “outsider” is about both the self-positioning of the researcher, and the identities assigned to them by their interlocutors. Contact-based research always involves some curation of self-presentation by researchers it is a professional activity, often spatially removed from daily life. Researchers, because of professional constraints, like IRB consent protocols, often present themselves to potential interlocutors with some credentials, like business cards, university affiliations, or brief biographical data. But when navigating the complexities of contact-based research, what are the ethical dilemmas posed by being able to “pass” as being a part of the population that the researcher has set out to study, versus standing out? How does moving through the research space with the potential for blending in ethically differ from being labeled by observable characteristics as an outsider?

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<sup>3</sup> Later in the book, once Vitebsky has developed relationships with the communities, he brings his family, and describes his own children as being “from another world,” and worrying about “bringing together people from two separate parts of one’s life” (2006, 332, 331).

Blee notes that the shared racial background that she had with her interlocutors (women in racist hate groups) was a reason she was allowed access to spaces, but she also was upfront at the outset with her participants, saying “I made it clear that I did not share the racial convictions of these groups. I explicitly said that my views were quite opposed to theirs, that they should not hope to convert me to their views” (2003, 11). While she was identified as a potential ingroup member, then, she positioned herself as ideologically outside, from the outset. However, this specific research project entailed the interviewing of explicitly racist group members about their activities. Much research with potential insider/outsider dynamics is not so clearly ethically delimited.

Anthropologist Atreyee Sen discusses the complexities of insider/outsider dynamics in a less clear-cut project, and the ways in which her hybrid status of being both insider and outsider shaped her research experience in her ethnography of the women activists in Shiv Sena, a conservative Hindu Nationalist organization.

The women introduced me to a world they thought was theirs and over which they had the right to rule. But they only caught glimpses of my world; they thought they knew everything about it anyway...I watched Sena women corporators attack and strip two Muslim women corporators in the House of Parliament, and then, having eaten ice-cream with Sena women on the beach, went home and helped during dinner, played with Kamla’s [a central interlocutor and Shiv Sena activist] grandson, told her son how to manage his dishonest accounts, and at the end of the day curled up in bed to write my notes. Now I loved them, now I hated them. Now I was an insider, now an outsider, but always an observer. I suffered several paradoxes and grave ethical dilemmas, which continue to haunt my writing. I felt my work came at a price: that of betraying the victims of violence with whom it is far easier to sympathise (Sen 2007, 16). Unlike Blee, Sen is not specifically seeking out individuals to interact with on the basis of morally reprehensible behavior, and yet, she finds herself interacting with people who do engage the same, and observing some of this behavior firsthand.

In my own work in South Africa, I conducted work similar to Sen, in the sense that I was often interviewing people with deeply held prejudices but was not specifically defining such populations for scrutiny, and with a degree of “insider” privilege. As a white woman conducting research in part in white, Afrikaans communities with a conversational grasp of the language, I was often mistaken for being Afrikaans myself. While the access provided by these observable similarities (like skin tone) with potential research subjects in primarily white spaces allowed me to move around without flagging my researcher status, I was often presented with ethical difficulties on the basis of my “passing.” Being superficially undetected shaped interactions in ways that ranged from humorous—people jokingly denying that I could be a foreigner when I did identify myself as such—to unsettling—as when an older man angrily confronted me about “losing my heritage” when I made a grammatical mistake in Afrikaans in public. I acquired the nickname “*die Amerikaner wat lyk soos ‘n Afrikanermeisie*/The American who looks like an Afrikaner girl.”<sup>4</sup> My public presentation, especially if I did not speak, allowed me to inhabit (public) spaces without drawing attention, as I did often in my research trip, attending church services, arts festivals, and university events in Afrikaans. This assignment of identity was not only among Afrikaans people, as members of other populations (Zulu-speakers, Sotho-speakers, etc.) in and around my research sites positioned me similarly, in part because of my facility in isiZulu, which they assumed was a result of a rural Afrikaans upbringing as a farmer’s daughter.

The reverse was true in my second field site, where I was primarily seeking to interview Zulu-speakers in Durban, who almost entirely identify as black and African.

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<sup>4</sup> This label was not related to my language skills, or ability to blend in, but specifically to my appearance.

While my Zulu language skills were more advanced, and presented fewer mechanical difficulties in translation, my appearance signaled immediate outsider status in many of the spaces that I inhabited. Casual interactions were marked by the assumption of my foreignness, as when a newspaper vendor who refused to sell me a newspaper in isiZulu, because despite my requesting to buy it and showing the man my money in isiZulu, he insisted that I could not read it. When I later told a Zulu-speaking friend about the interaction, I was met with raucous laughter, and my friend told me “you cannot go around looking like you do and then speak like that. You broke that man’s brain!” Despite my official training, and the fact that my conversational isiZulu was far superior to my Afrikaans, I was incomprehensible to this newspaper vendor, and an amusement to my friends, when I tried to work within that social space without appropriate introduction.

The quotidian nature of the insider/outsider dynamics raised ethical difficulties, inherent in much field-based research, about the nature of data, the idea of recording social dynamics, and what constitutes public behaviors. But these questions are compounded because, while much interaction-based research involves seeking out candid revelations, the position of “passing” brings in the implied or explicit sense that the researcher is in accord with their research participants. The balance of being a person, who engages in non-research-based socializing in the course of fieldwork, versus being a recorder of social and political life, is an ethical tightrope. I went to after work hours where I was a known researcher where racist jokes were made, or allusions to the idea of an “inevitable race war.” I went to get my haircut, and the white stylist after a brief interlude of small talk, largely about what I had seen in the country, launched into a tirade

about how “the Blacks” did not value environmental conservation because they could not “think about delaying gratification,” which I “must understand,” since I came from a place that was also diverse. Should these comments inform my research? During the course of interviews with white participants, there were often interjections about how pleasant it was for research interlocutors to let their guard down and speak honestly because I must know where they were coming from. Was this data? When I was assumed to be in accord with racist sentiments, was my responsibility to record, or to contradict? Admittedly, in the moment, I rarely engaged in direct confrontation, even in the face of the most strident prejudices, and like Sen, I am also haunted by those choices.

The converse was true in primarily Black spaces, where I spent the second half of my fieldwork speaking to Zulu-speaking South Africans, where my outsider status was flagged quickly. In this phase of my research, I had to work much more to build a rapport, and the divulging of information was seemingly more intentional. There were moments of tension, as when a research participant told me that she found conversing with white people uncomfortable, even 20 years into multi-racial democracy, and quietly added “like now.” This discomfort required ethical navigation, and in the moment, I simply apologized.

Such ethical conundrums were also inherent in the interview space, a place more closely regulated by bureaucratic ethical considerations. Even after informed consent sheets had been distributed and credentials offered, there were significant differences between interviewing people who thought of me as an “insider” versus an “outsider,” primarily on the basis of race. Within the interview space, my positionality as a white woman opened up certain opportunities for me, while foreclosing others. In primarily



white, Afrikaans-speaking interviews, I found that I was often assumed to be in agreement with interview participants; that I was taken into their sense of “we” with relative ease, in both English and Afrikaans interactions. Interjections, like “oh you understand” are notated with some frequency in my interview transcripts from these interactions. Even when I had clearly identified myself as a foreign researcher, and was actively taking notes, there was a sense in which I still had “passing” privileges. I was allowed into spaces, and taken into confidences, like both Blee and Sen, that were available in part because of my racial identity. Conversely, many Black participants in interviews and in social interactions were more circumspect, and occasionally openly expressed discomfort, as noted above. Was this also data? Was my responsibility to apologize for the discomfort, or to analyze it? How would my project have turned out differently had it been conducted by someone else?

I do not believe I have firm answers to the above questions, even several years after my data collection efforts for that project have concluded, and it nears publication. Ultimately, little text from my fieldnotes appear in the final book manuscript, but they remain as background, informing my conclusions. I wish, however, that I would have had the tools to think critically about these issues before the data collection on my project began.

### **Toward a Positional Ethics**

My assertions here are twofold: firstly, ethics training should include critical examination, and possible abandonment, of the idea of researcher neutrality in contact-based research. As a discipline, political science must engage with the idea of

positionality, but also move beyond the idea that such discussions are matters of the practicalities of fieldwork. Positionality is an intersubjective process, and one over which any individual researcher has a limited amount of control. Learning from anthropologists like Sen, Vitebsky, and others, as well as political scientists like Wedeen, Lin, and Cramer, can help to inform the discussion of how contact-based research is a fundamentally interpersonal enterprise. This new emphasis does not abandon the idea that central ethical principles, like protection of vulnerable populations or maintaining confidentiality, but rather seeks to examine on the ways that even core ethical practices are inflected by the positionality of the researcher.

Second, in advance of contact-based research projects, researchers should reflect on how their self-presentation and potential assumed identities shape their research ethics strategies, and tailor them accordingly. Identifying oneself in the research setting, but also being identified by others, shapes the ethical and data landscapes that a researcher navigates, as well as the kinds of approaches that researchers can take to pursue substantively ethical research. In both standing out and blending in, researchers should be reflective on how their presence and their identities (both lived and perceived) shape considerations of consent, access, trauma, and harm in their interactions with research participants. These considerations are true of all contact-based work, whether in the form of surveys, participant observation, or ethnography. There is not, of course, a single strategy that can work for all projects. I believe we can allow for the possibility that either direct confrontation, in the vein of Blee, or “haunting” as described by Sen, as well as other points along the spectrum, can be viable ethical practices in the face of problematic assumed solidarities. But central to this project is the idea that any such

strategy must be considered before research implementation, rather than implemented *ad hoc*, in order to conduct ethically consistent work. Not all eventualities can be planned for, and not all ethical conundrums can be resolved in the implementation of contact-based research. However, I argue that in making positionality central to our discussions of ethics, we are centering the real demands of an thorough ethical sensibility in contact-based research.

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