

Research Methods in Critical Security Studies

An Introduction

Second Edition

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Jonathan Luke Austin

Introduction

A few years ago, I was in a taxi heading to a place called Dahiyeh. Dahiyeh is somewhere you might better know from television as the Hezbollah 'stronghold' of Southern Beirut. But, in reality, Dahiyeh is just an impoverished urban sprawl. It's not a pretty place. It's a concrete place, more than anything else. I was heading there, passing anti-blast barriers and security checkpoints, in order to reach an organization called UMAM Documentation and Research. UMAM is an activist non-governmental organization (NGO) that explores issues of collective memory and political violence in Lebanon from the time of its civil war till today. On arriving, I began a meeting in a side room just off from the green gardens surrounding the building. Coffee and tea were brought out. Served by somebody from South Asia: an immigrant, of sorts (this is not a good place to emigrate to). We were meeting to talk about torture or, more specifically, a film that a group of former Lebanese prisoners had put together based on their experiences. We watched the rushes together, silently.

Research can be dangerous, perhaps increasingly so. The position of researchers has merged, to some degree, with that of journalists: we can be deemed threatening and so, for some, the academic is an object to be securitized against. This is especially true in the settings most relevant to researchers working within critical security studies (CSS). The story I am telling here hopes to help researchers navigate some of the dangers they may face when using ethnographic, field-based interviewing, or related methods to study 'insecure' environments. It does so on the basis of my own experiences studying the political violence of torture in, you'll have guessed, Beirut, Lebanon, where I was interviewing Syrian perpetrators of torture (cf. Austin, 2016; 2017; 2019). At the same time, I also wanted to speak with those who had survived what Syria was now going through, hence my meeting with those former detainees-turned-filmmakers. My aim was to understand the lingering effects of atrocity: the ways in which political violence seeps under the skin of societies and how they can, or cannot, slowly come to terms with that history. But, as you'll soon see, things went a little wrong during that effort. To show you what I mean, I want to tell the story I began just a moment ago as it stands, while pausing a few times to reflect on (1) the importance of being mindful of your ever-present status as a 'stranger' when carrying out research of this kind, (2) the crucial task of managing both your data and your research (design) in ways that maintain your own security and that of your informants, and (3) the advantages of maintaining a calm and measured response to situations like the one I am about to describe in ways that can – in fact – feed into your research findings in and of themselves. The goal is to provoke you to think about dangers you may face before they occur.

After my meeting, I headed to relax at a café because – well – I like Dahiyeh. It possesses a kind of life long emptied out of the gentrifying central districts of Beirut. Dahiyeh feels more alive. Ugly, yes, but alive. The café was busy, and I drew some attention. But that happens: there aren't many foreigners in Dahiyeh. I ordered an *'argilla* (shisha) and began puffing nicotine into my veins. After a few minutes, I noticed a problem: the smoke was not flowing properly. I didn't bother the waiter and began disassembling and fixing the device myself. On reflection, this wasn't the best idea. Interest piqued around me. One man sitting adjacent to me shuffled over and began chatting: Do you speak Arabic? Where are you from? What are you doing here? A few minutes later, a second younger man arrived; not older than 20. He sat down beside me, while the man who had been chatting suddenly moved away slightly. The new arrival focused on a book in my hands: *Return from Hell*, a memoir of one Lebanese man's detention in Syria. I'd been given it at the UMAM offices. My new interlocutor asked, "why are you reading that?" Before I could reply, the man who had been speaking to me earlier interjected, "he's a researcher." The young arrival asks for specifics, and I respond vaguely. After a few pleasantries, he then asks me to come with him to "see his boss." The other men in the café nodded reassuringly. He was polite but firm:

Come with me, you are our guest, don't worry.

No choice about it, then. We took his small scooter, which is the sign – throughout Beirut – of people affiliated with Hezbollah: young men on scooters weaving between traffic, when not delivery drivers, are most often working with the 'party'. It's an efficient mode of transport. He twisted through the streets and sharply around corners, through the concrete labyrinth. We soon arrived at a non-descript apartment block notable only for two guards standing at the front door, AK-47s discretely at their sides. The young man then asked for my bag – reassuring me by saying "No problem, no problem, your bag" – and ushered me into a small – perhaps ten-square-metre-large – room. Three faded dark faux-leather armchairs were positioned in the room, facing two desks. There were two other doors in the room. I walked inside and the man gestured for me to sit. I did and he turned around, pulled a key from his pocket, and locked the door. He then left through the other, telling me to wait, while asking still very politely if I'd like water.

Being a 'stranger' is often surprisingly key to the success of field-based research. This is not necessarily because a stranger can be seen as somehow possessing "privileged access to a more objective or universal type of knowledge" but also because of her "capacity to weave together elements ... between different worlds" (Karakayali, 2006:318). Moreover, being a 'stranger' can allow researchers to act as 'confidants' who receive "the most surprising revelations and confidences, at times reminiscent of a confessional" (Simmel 1971:145). Nonetheless, such an in-between positionality also presents dangers precisely because of the breaches in layers of social secrecy that it mobilizes. In the story I'm telling, these risks emerged because of a sudden lapse in my concentration as I relaxed a little too much and thus drew rather too much attention to my status as a stranger in a place where, well, trust was in short supply. Now, while the strangeness of a researcher (even one who hails from the place or institution they are studying) can never be overcome – it will always be present (and variable, based on your gender, ethnicity, nationality, etc., etc.) – conducting fieldwork in more or less 'dangerous' settings demands you work to manage this status.

Safely managing your 'strangeness' usually requires that you draw on its advantages without becoming too overt a spectacle. This will involve, unlike in my story, avoiding situations where you are just a little *too* out of the ordinary and/or have things in your possession (i.e.,

the book *Return from Hell*) that render you suspicious. It also means preparation that goes beyond the immediate subject of your research. Know who might be concerned by your presence, both formally and colloquially (i.e., in my case, knowing that mentioning the 'party' refers to Hezbollah), and how to manage their concern. This does not mean being paranoid. It only means being prepared for the unexpected and knowing what to do when or if it occurs to you. It also means working out what you *want* from your research setting. In some cases, to contradict what I have just said, drawing too much attention to yourself can be a goal in itself. For example, if I had been seeking to understand the quotidian life of the suburbs of Dahiyeh, I would have begun precisely as I described earlier: hanging out in street-side cafes, smoking *'argilla*, and chatting aimlessly. This would have again drawn attention but, most likely, only for a while. Slowly, I would have hoped to build up a circle of acquaintances-cum-informants who, despite my unavoidably permanent status as a stranger, would come to feel a measure of trust through such little acts of social integration. This trust would be crucial to that particular kind of fieldwork. But that's not what I was in Beirut to get done, hence the error. In short, how exactly to manage your social position during fieldwork will always vary depending on your research goals and the nature of your environment. Nonetheless, it is something that always requires reflection.

The first thing you notice when being detained is the way in which your eyes suddenly realize the full scope of their functionality. They don't skip over things. Instead, they scan everything. There was only one window in the room, but it had been covered over with boards. The desks were covered in papers. On the wall was a white air conditioner that buzzed constantly. *Buzz, buzz, buzz.* The furniture was stained with cigarette burns. Apprehensive, I paced a little forward and then turned to where I had been sitting. Behind the chair I saw a large rust-chestnut patch of red paint. Well, no. Dried blood staining the wall, in fact. Faded. Not recent, but palpable. As I stared at this, the young man returned, and smiled. He ushered me to sit down again and began to ask more questions:

What is the purpose of your visit to Lebanon?

And then more specific questions: my full name, my parents' names, my date of birth, my occupation, my address in Lebanon, my phone number, the phone numbers of everyone I know in Lebanon. He then asked for the password to my laptop. I obliged and he disappeared again for a much longer time. I'm not sure how long. Time elongates itself at moments like these. Just a few hours detained starts to get to you. Behind those locked doors, without anything to occupy oneself, all that is left is what is 'inside your head' and – it seems – the head is a place without time. I pondered the room again: cigarette smoke, blank walls, a broken clock, and blood on the wall. Oh, and the air conditioner. If you read about torture, the idea that air conditioning can be used as a technique to 'break' someone will seem surprising. But even without altering its temperature, the constant *buzz buzz buzz* of the device starts to – literally – 'hurt' the body as this sound of static noise comes to replace the beautiful miscellany of the world we are used to living in. This is true even when, like me, you know you will probably be out soon enough. A few hours passed like this before the man returned with a colleague and asked a few more questions, including why Google Maps was open on my laptop. I responded I was looking for directions. He nodded and left again.

You'll notice how in telling this story so far that I glossed quickly over the ways in which I first handed over my laptop to those detaining me, then gave them its password, and then asked questions about its contents (Google Maps) without much concern. Like most researchers working 'in the field' these days, all my work and the details of those I was in

contact with were on that device. My lack of concern related, again, to preparation. When carrying out research in which there is even a *slight* risk of the information you collect being used against you and/or those you are contact with, developing a strategy to secure your data is crucial. Central to these efforts is the use of encryption. Ideally speaking, your entire device should be encrypted such that in case of its loss, none of its data can be accessed. In my case, the fact of my laptop being entirely encrypted was, however, irrelevant: they wanted the password, and I couldn't refuse. However, all data related to my research was hidden on an innocuous folder on the system that was, in and of itself, encrypted. Finding this folder and accessing its contents would not be impossible but it would require far more resources than you are ever likely to encounter in the field. The risk is still there, however. Hence, this 'system level' (i.e., laptop, etc.) protection should always also be complemented with a strategy for exporting your data from your local machine to a machine situated outside your field setting. This can occur in many different ways. Perhaps the simplest is to encrypt your files on your machine and then to systematically (say, every week) upload these files 'to the cloud' on one of many available services. In this way, any information accessible on your machine will always be very limited.¹

Another few hours pass.

Buzz, buzz, buzz.

Finally, they return. This time, they began by writing my name, passport number, and date of birth on a white board. Then they ushered me to stand by the wall and took my picture with a cheap digital camera. A little mug shot. Then they took my fingerprints. Foucault has been to Dahiyeh. They left again but quickly returned with an older man: someone in charge. Gruffly, smoking, he looked me up and down. He produced the book I had been earlier – *Return from Hell* – and gave it back. "This," he said, "is all lies." He made a quick hand wave to the man who had brought me there and left. The young man handed me my bag, neatly repacked, and my laptop (now with a little piece of sticky-tape over the webcam: better safe than sorry) and smiled. He took the key out of his pocket and put it in the lock and waved me goodbye. It was night in Dahiyeh. I had been detained about ten hours or so. I answered the three or four text messages that had appeared on my phone: *back soon, all fine.* And I then headed back to finish my *'argilla*.

Most of the time fieldwork is not dangerous. CSS still, and not to its credit, remains a stronghold of Euro-American-based researchers who – just like me – will find that everything works out fine, despite a few hiccups here and there. We are mostly privileged. But even if that is the case for you, it is crucial to remember that things could well be otherwise and that they likely *will* be otherwise for researchers of different genders, ethnic backgrounds, sexual orientations, or religious positionalities. Likewise, always be aware that even innocuous encounters can cause dangers to those you are (even indirectly) speaking with, if not yourself. Thus, the importance of data protection, however inconvenient that task might seem to you after a long day. Realize too that it may be your responsibility *not* to involve vulnerable groups or individuals in your research. Don't forget that you are never just 'asking questions' but also always actively interfering in the personal and social worlds of those you study. Research 'in the field' is never neutral.

Keeping yourself safe is equally important. The text messages I was answering at the end of the story I've told here were from colleagues who knew where I was going and why. One of these colleagues was in Beirut, another abroad. They were checking in on me and had I not responded would have known whom to contact. In extreme settings, GPS tracking solutions can help improve your safety. Of course, methods like those may sound unusual. Indeed, they

are more common among journalists than academics, whose profession has long reckoned with these issues. Despite similarities, however, the analogy with journalism should usually not be taken too far. Scholarly work within CSS rarely seeks to identify 'facts' about a particular event, group, or person that are to be reported. Most of us do not intend to write *exposés* with the potential to directly legally, socially, or politically threaten the groups or individuals with whom we are in (indirect or not) contact. As CSS and cognate fields begin ethnographically (or otherwise) engaging with more (in)secure parts of the world, however, this distinction becomes harder to maintain *for those we come into contact with*. An academic found in possession of unusual electronic devices (GPS trackers, encrypted hardware), for example, may automatically be deemed more suspicious than had they not used these tools. As ever, then, careful personal judgement is crucial in deciding how to keep yourself safe.

Beyond practicalities, scholars will often *not* wish to overly distance themselves from certain types of danger. Take my case. If, in seeking to understand the societal effects of persistent political violence and conflict on everyday life, I had begun by seconding myself in relatively secure and wealthy areas of Beirut, then my eventual account would hardly have been a particularly honest one. This dilemma, of course, is reflected in the ways in which academic institutions are increasingly unsure how to manage research safety and ethics. In my case, very little institutional advice was offered (beyond check-box ethics forms) before leaving for the field. And, upon my return, the glib response to stories like the one I have told here from a few institutional figures (whom I'll leave nameless) was a simple "lucky that ended how it did, we'd be in trouble otherwise." And so, while academic institutions generally should do more to ensure the safety of researchers and those they study, it is also important to stress that there are no easy solutions here. Indeed, attempts to institutionally securitize research risk blanking out half the world as inaccessible to scholars. I know, for example, that my own research would not have been possible in other institutions.

Ultimately, I would argue that some measure of danger should be accepted in our research, just as we accept it in everyday life. We all visit 'less safe' parts of town when we are at home and, despite the risks elsewhere, none of us want to insist on only taking holidays in Switzerland. And we accept the dangers of our everyday lives, of course, because we are familiar with them and have learned to navigate them to the best of our ability. A similar attitude, I would suggest, is crucial to navigating our field-based research. An active familiarity with the social and political context that you plan to work in is crucial. I, for example, was fully aware of the nature of Dahiyeh before I went there. For those with less experience in a particular setting, seeking out the advice of those you know who do possess such experience will thus be crucially important. Learn from those who are already familiar and accept that your colleagues will generally be more useful than the regulations or advice offered by your home institution. Take what they say seriously.

Conclusion

To conclude, accept that research is never 'clean.' It is always messy and unpredictable. Embrace that fact and learn from it consistently. Reflect, for example, on your reaction to any apparently 'dangerous' situation you encounter. On the ways in which, say, the *buzz buzz* of air conditioning does 'something' to you. Consider your power or lack thereof. In my case, the way in which my detention was so swiftly resolved. Ponder the mundane but power-saturated nature of the situation: the biopolitics of the fingerprinting, the ways in which simply being in the 'wrong place' (a café) while being the 'wrong' person (a researcher) alters the course of events dramatically for individuals. And don't forget that encounters with

armed groups or security forces are entirely normal, however uncomfortable they may make you feel. Indeed, they are a daily experience for the subaltern of the world. Remember, too, the history of academic exploitation, from colonialism onwards, as well as the fact that the motives of scholarly research are often legitimately suspicious for many across the world.² Indeed, realize you might not trust yourself if the tables were turned. Don't accept that your own motives are so innocent. And, of course, deconstruct without dismissing the very idea of 'dangerous' places. Then share these thoughts wherever you deem appropriate. And, above all, ensure that your work does no harm, to yourself of course, but also to those with whom you are interacting. Make sure you can tell your story in good faith.

Notes

- 1 For a comprehensive guides on encryption methods see <https://tinyurl.com/y7pawpyt> and/or <https://tinyurl.com/y94k4zp7>.
- 2 See <https://www.theguardian.com/news/2017/oct/10/the-science-of-spying-how-the-cia-secretly-recruits-academics>.

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