



RESEARCHER POSITIONALITY IN QUALITATIVE AND MIXED-METHODS RESEARCH: THEORETICAL FOUNDATIONS, PRACTICAL CHALLENGES, AND REFLEXIVE STRATEGIES

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Abstract: Researcher positionality — the constellation of a researcher's social identities, prior experiences, values, and epistemological commitments that shape every stage of the research process — has received increasing attention in qualitative and mixed-methods educational research over the past three decades. Yet many researchers, particularly those conducting their first large-scale study, encounter positionality as an abstract methodological requirement rather than a genuinely lived challenge with concrete consequences for data quality, interpretive validity, and ethical rigour. This article reviews the theoretical foundations of positionality as a methodological concept, examines the specific challenges it poses across the research cycle — from question formulation through data collection, analysis, and representation — and synthesises the reflexive strategies that the literature recommends for managing its influence productively. Particular attention is given to the distinctive positionality challenges faced by researchers who study their own communities, those who hold ideological commitments to the populations they research, and those conducting educational research in non-Western institutional contexts where Western methodological frameworks do not translate straightforwardly. The article argues that positionality is not a problem to be solved but a resource to be managed — and that researchers who engage with it honestly produce more trustworthy, more contextually grounded, and ultimately more useful knowledge than those who treat it as a methodological inconvenience to be minimised or concealed.

Key words: researcher positionality, reflexivity, qualitative research, mixed methods, insider research, epistemology, trustworthiness, educational research

1. Introduction

The notion that research is conducted by a neutral, disembodied observer who collects data from a safe epistemological distance has been thoroughly challenged in the social science literature. Researchers bring to their work a full range of personal and



professional identities — their gender, ethnicity, institutional affiliation, disciplinary training, political commitments, and prior experiences with the phenomena they study — and these identities shape the questions they ask, the methods they choose, the relationships they form with participants, and the interpretations they construct from data. Acknowledging this is not a confession of bias; it is an epistemological necessity for research that claims to be rigorous and trustworthy (Creswell & Poth, 2018).

The term that has come to organise this acknowledgement in the methodological literature is positionality. Broadly defined, positionality refers to the position a researcher occupies in relation to their research — the intersecting social locations, power relations, and epistemological commitments that constitute their standpoint and inevitably influence their scholarship (Bourke, 2014). Positionality is not static; it shifts as researchers move between different phases of their projects, different relationships with participants, and different institutional contexts. Managing it is therefore not a one-time declaration at the beginning of a dissertation or article, but an ongoing reflexive practice that extends across the entire research cycle.

Despite the growing consensus on the importance of positionality in qualitative and mixed-methods research, guidance on how to engage with it in practice remains uneven. Many methodological texts acknowledge positionality in principle while offering limited concrete direction for researchers navigating its challenges in specific contexts — particularly in non-Western settings where questions of insider/outsider status, language, and power are shaped by histories and social structures that standard Western methodological frameworks do not anticipate. This article aims to address that gap by examining positionality not as an abstract philosophical concept but as a practical methodological challenge with specific manifestations and specific strategies for management.

2. Theoretical Foundations of Positionality

2.1 *From Objectivism to Situated Knowledge*

The theoretical origins of positionality as a methodological concern lie in the broader epistemological critique of positivism that gathered force in the social sciences from the 1970s onwards. Positivism, as a research paradigm, holds that social reality exists independently of the observer, that its features can be measured objectively, and that the researcher's role is to minimise subjective interference in the measurement process. This paradigm produces a conception of the ideal researcher as a neutral instrument — trained to bracket personal experience, apply standardised procedures, and report findings without interpretive contamination.



The critique of this ideal came from multiple directions. Feminist epistemologists, most influentially Haraway (1988), argued that the "view from nowhere" claimed by positivist science was in fact always the view from somewhere — a specific social location that was systematically concealed rather than genuinely absent. Haraway's concept of situated knowledge holds that all knowledge is produced from a particular standpoint, and that acknowledging this standpoint is the condition of intellectual honesty rather than a compromise of it. Research that conceals its situatedness does not thereby become objective; it merely obscures the perspective from which its claims are made.

Guba and Lincoln's (1994) influential typology of research paradigms — positivism, post-positivism, critical theory, and constructivism — provided a framework within which the implications of situated knowledge for research design could be systematically worked out. Constructivist and interpretivist paradigms, in particular, treat the researcher's subjectivity not as noise to be suppressed but as an instrument to be calibrated: the researcher's cultural knowledge, empathic capacity, and interpretive experience are the primary tools through which meaning is constructed from qualitative data.

2.2 Positionality and Reflexivity

The practical methodological response to the situated nature of knowledge is reflexivity — the ongoing, critical examination of how the researcher's position influences every stage of the research process. Finlay (2002) distinguishes several forms of reflexivity: introspection, where the researcher examines their own subjective responses; intersubjective reflection, where the focus is on the research relationship itself; mutual collaboration, where participants are involved in the meaning-making process; social critique, where the researcher examines the broader power relations shaping the research; and ironic deconstruction, where the researcher interrogates the very concepts they use to analyse the data.

Not all of these forms of reflexivity are equally appropriate for all research contexts. In educational research, the most commonly practiced forms are introspection and intersubjective reflection — the researcher's examination of their own assumptions and of the dynamics of their relationships with research participants. What is essential, across all forms, is that reflexivity be documented and transparent: the researcher's position should be visible to readers, not merely acknowledged to themselves in private (Creswell & Poth, 2018). A positionality statement that merely lists demographic characteristics without examining their implications for the research provides the form of reflexivity without its substance.



2.3 Positionality in Mixed-Methods Research

While positionality has been most extensively theorised in qualitative research, it is equally relevant — and often more complex — in mixed-methods designs. Mixed-methods researchers must negotiate not only the positionality challenges of qualitative data collection and interpretation, but also the epistemological tensions between quantitative and qualitative paradigms that their designs combine (Creswell & Plano Clark, 2017). A researcher who is deeply committed to the lived experience of their participants may find it difficult to maintain the analytical distance that quantitative analysis requires; conversely, a researcher trained primarily in quantitative methods may approach qualitative data with positivist assumptions that distort its interpretation. Johnson and Onwuegbuzie (2004) argue that mixed-methods research is best served by a pragmatist epistemological stance that is explicitly agnostic about the deeper metaphysical questions that divide paradigms, focusing instead on what methods are most useful for answering specific research questions. This pragmatist approach does not dissolve positionality concerns — the researcher's prior experiences, values, and commitments still shape every methodological decision — but it provides a more flexible framework within which the competing demands of quantitative rigour and qualitative depth can be balanced without constant epistemological crisis.

3. Positionality Challenges Across the Research Cycle

3.1 Research Question Formulation

The influence of positionality begins before a single data point is collected, at the stage of research question formulation. The questions a researcher asks reflect their theoretical commitments, their prior experiences, and their judgments about what matters — all of which are shaped by their social position. A researcher who has experienced cultural exclusion in educational settings will ask different questions about multilingual classrooms than one who has not; a researcher committed to social justice will frame research questions around inequity and transformation rather than efficiency and optimization.

This is not necessarily a problem. Research questions that emerge from researchers' lived experience and genuine concern are often more penetrating and more practically relevant than those generated by purely theoretical or technical considerations. The problem arises when the researcher is unaware of how their positionality has shaped their questions — when they treat their particular framing as the only natural or obvious framing, rather than as one among several possible ways of approaching the same phenomenon. The discipline of asking "why am I asking this question, and what am I



assuming in asking it this way?" is among the most important forms of reflexivity available to researchers at the design stage.

3.2 Participant Relationships: Insider and Outsider Dynamics

The most extensively discussed positionality challenge in qualitative research concerns the researcher's relationship to the community they are studying. The insider/outsider distinction — whether the researcher belongs to or is an external observer of the community being researched — shapes participant access, data quality, and interpretive depth in ways that have been debated extensively in the literature (Merriam et al., 2001).

Insider researchers — those who share ethnic, cultural, institutional, or experiential membership with their participants — benefit from existing trust, shared language, and contextual knowledge that allows them to understand nuances that would be opaque to an outsider. At the same time, insider status carries specific risks. Participants may assume shared understanding where genuine inquiry is needed, providing abbreviated responses that omit what they take to be obvious. The researcher may unconsciously filter data through their own cultural assumptions, treating their perspective as representative when it may be specific to their particular social location within the community. And the emotional investment that often accompanies insider research can make it difficult to engage honestly with data that challenges the researcher's prior beliefs about the community (Unluer, 2012).

Outsider researchers face a different but equally significant set of challenges. Without existing relationships and cultural knowledge, they may gain access only to the public face of a community rather than its lived reality. Participants may perform expected roles rather than sharing genuine experience. Cultural meanings may be misinterpreted through the researcher's own cultural lens. And the power asymmetries that typically accompany outsider research — particularly when the researcher comes from a more privileged institutional or national context than the participants — can compromise the ethical quality of the research relationship (Chavez, 2008).

In practice, most researchers occupy neither a pure insider nor a pure outsider position but something more complex and shifting. Dwyer and Buckle (2009) propose the concept of the "space between" — the contested, dynamic zone that researchers inhabit when their relationship to a community is partial, multiple, or evolving. A researcher who shares ethnicity with their participants but not gender, or professional background but not socioeconomic status, occupies this in-between space — neither fully inside nor fully outside, with the specific access and specific blind spots that this partial membership produces.



3.3 Data Collection and the Research Relationship

Positionality shapes data collection not only through the researcher's prior relationship to the community but through the dynamics of the research encounter itself. Interview data, in particular, is co-constructed rather than extracted: what a participant says depends substantially on their perception of the researcher — their apparent identity, institutional affiliation, and purpose — and on the social norms governing appropriate disclosure in the specific cultural context (Kvale & Brinkmann, 2009).

Power asymmetries between researchers and participants deserve particular attention in educational research. When a teacher-researcher conducts research with their own students, the dual role creates a specific ethical tension: students may perceive participation as obligatory or feel that their relationship with their teacher depends on providing supportive data. Guillemin and Gillam (2004) argue that genuinely informed consent in such contexts requires not merely a signed form but an active, ongoing process through which participants understand their right to withdraw, their ability to challenge interpretations, and the separation between their participation in research and any evaluative relationship they may have with the researcher.

3.4 Data Analysis and Interpretation

The influence of positionality on data analysis is perhaps the least visible and therefore the most difficult to manage. Analysis feels like a technical process governed by systematic procedures — coding frameworks, thematic categories, statistical tests — and the researcher's subjectivity can appear to have been disciplined out of the procedure. But the decisions that precede and accompany these procedures — which data excerpts to select as illustrative, which themes to foreground and which to treat as peripheral, how to frame the narrative that connects findings — are all shaped by the researcher's prior beliefs and commitments (Braun & Clarke, 2006).

Confirmation bias is the specific risk that positionality poses at the analysis stage: the tendency to attend more readily to data that confirms prior expectations and to explain away or minimise data that challenges them. Lincoln and Guba's (1985) criterion of credibility in qualitative research explicitly addresses this risk through the strategy of negative case analysis — the systematic search for evidence that disconfirms emerging interpretations. A researcher who can document their engagement with disconfirming evidence, and account for how they reconciled it with the overall interpretation, demonstrates an analytic rigour that substantially strengthens the trustworthiness of the findings.

4. Reflexive Strategies for Managing Positionality



Table 1. Positionality Dimensions, Associated Risks, and Recommended Reflexive Strategies

Positionality Dimension	Potential Risk to Research	Reflexive Strategy	Key Scholars
Insider status (same community as participants)	Assumptions replace inquiry; participants withhold dissenting views; over-identification with findings	Bracketing prior knowledge; member checking; actively seeking disconfirming evidence	Merriam et al. (2001); Unluer (2012)
Outsider status (different community from participants)	Misinterpretation of cultural meaning; participants perform rather than disclose; surface-level access	Extended engagement; community gatekeepers; collaborative interpretation	Dwyer & Buckle (2009); Chavez (2008)
Power asymmetry (researcher holds institutional authority)	Participants give socially desirable responses; informed consent compromised by perceived obligation	Voluntary participation clearly communicated; separation of researcher and evaluator roles	Guillemin & Gillam (2004); Creswell (2013)
Ideological commitment (researcher advocates for study population)	Confirmation bias; selective reporting; overstating supportive evidence	Negative case analysis; peer debriefing; transparent audit trail	Lincoln & Guba (1985); Braun & Clarke (2006)
Methodological standpoint (paradigmatic)	Research questions, instruments, and interpretations	Explicit positionality statement;	Guba & Lincoln (1994); Crotty (1998)



assumptions)	shaped by unexamined epistemological commitments	philosophical consistency audit across design choices	
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4.1 The Positionality Statement

The most common formal response to positionality in published research is the positionality statement — a section, typically in the methodology chapter, where the researcher describes the aspects of their social location most relevant to the research and reflects on how these may have shaped the study. The quality of positionality statements varies considerably. Weak statements merely list demographic characteristics ("I am a female researcher from Uzbekistan") without examining their implications. Strong statements identify specific ways in which the researcher's position may have influenced specific methodological decisions — why particular questions were asked, why certain participants may have responded in particular ways, how interpretations were shaped by the researcher's prior commitments — and document the strategies used to interrogate and manage this influence (Creswell & Poth, 2018).

A positionality statement is not a confession of inadequacy; it is an invitation for readers to assess the knowledge claims being made with full information about the conditions of their production. Readers who know that a researcher has a strong ideological commitment to the population they are studying can evaluate the findings accordingly — which is more epistemologically honest, and ultimately more useful, than presenting those findings as if they emerged from a neutral vantage point.

4.2 Reflexive Journaling

Reflexive journaling — the practice of maintaining a running record of methodological decisions, interpretive choices, and emotional responses throughout the research process — is one of the most widely recommended strategies for managing positionality in qualitative research (Ortlipp, 2008). A reflexive journal serves multiple functions simultaneously: it provides an audit trail that documents the evolution of the researcher's thinking, making the interpretive process transparent and retrospectively examinable; it creates a space for processing the emotional dimensions of research that are otherwise suppressed in formal methodological writing; and it functions as a form of ongoing self-interrogation that surfaces assumptions before they harden into unexamined certainties.



The discipline of regular reflexive journaling requires that researchers articulate not only what they observed but why they noticed it, what they expected to find and how those expectations interacted with what they actually encountered, and what decisions they made at choice points in the research design and why. This articulation is itself a form of knowledge production: the researcher who can account for their methodological decisions in principled terms understands their research more deeply than one who made the same decisions unreflectively.

4.3 Member Checking and Peer Debriefing

Two further strategies for managing positionality draw on relationships rather than individual reflection. Member checking — sharing interpretations with research participants and soliciting their responses — addresses the risk that the researcher's interpretation diverges from participants' own understanding of their experience (Lincoln & Guba, 1985). It is particularly valuable for insider researchers, who may project their own cultural knowledge onto participants' responses, and for researchers whose ideological commitments may lead them to emphasise certain aspects of participants' experience over others.

Peer debriefing — subjecting the research to critical examination by a trusted colleague who is not involved in the study — provides an external check on the researcher's interpretive process. A peer debriefer who asks "why did you interpret it this way rather than that way?" performs an invaluable function: they make the researcher's assumptions visible by challenging them from a different standpoint. The most productive peer debriefing relationships are ones in which the debriefer feels genuinely authorised to challenge the researcher's interpretations rather than merely to validate them.

5. Positionality in Non-Western Research Contexts

Most of the methodological literature on positionality was developed in Western academic contexts — primarily North American and British — and its frameworks reflect the specific social structures, power relations, and epistemological traditions of those contexts. Researchers conducting educational research in non-Western settings face positionality challenges that the standard literature does not always address adequately.

One distinctive challenge concerns the relationship between Western methodological frameworks and local epistemologies. Researchers in Central Asian, African, Middle Eastern, or Southeast Asian contexts who have been trained in Western research traditions may find themselves applying frameworks — about individuality, privacy,



informed consent, and the separation of research from social relationships — that sit uneasily with local cultural norms. Smith's (2012) critique of research conducted on indigenous communities argues that Western research methodologies have historically served colonial rather than community interests, and that genuinely ethical research in non-Western contexts requires not merely the application of standard ethical procedures but a fundamental rethinking of the relationship between the researcher, the community, and the knowledge being produced.

A second challenge concerns language. Research conducted by non-native speakers of the language in which most methodological literature is published, or in settings where data is collected in one language and written up in another, involves layers of translation — linguistic and cultural — that carry their own positionality implications. Decisions about which terms to translate literally, which to adapt, and which to leave in the original language are not merely technical; they are interpretive choices that reflect the researcher's position between cultural worlds (Temple & Young, 2004).

A third challenge, relevant to researchers who study communities to which they belong, concerns the relationship between scholarly and community identity. A researcher who is simultaneously a member of the community they are studying, a doctoral student within a Western academic institution, and a practitioner in the educational system they are examining occupies a genuinely complex positionality — one in which commitments to scholarly rigour, community accountability, and professional practice may pull in different directions. Managing this complexity requires not the resolution of these competing commitments into a single coherent position, but the honest acknowledgement of their tension and the documentation of how specific research decisions navigated it.

6. Conclusion

Researcher positionality is not an obstacle to valid knowledge production; it is a constitutive feature of all knowledge production. The question is not whether the researcher's position influences their research — it always does — but whether that influence is acknowledged, examined, and managed with the rigour that honest scholarship demands. Researchers who engage seriously with their positionality do not thereby weaken their research; they strengthen it by making its conditions of production visible and by demonstrating the intellectual discipline to interrogate their own assumptions rather than simply enacting them.

The strategies reviewed in this article — positionality statements, reflexive journaling, member checking, peer debriefing, negative case analysis — are not bureaucratic



procedures to be completed and forgotten. They are practices of intellectual integrity that produce better research: research that is more contextually grounded, more sensitive to the complexity of human experience, and more honest about the limitations of the knowledge it claims to produce. In the specific context of educational research conducted in multilingual, multicultural, and non-Western settings, where the stakes of misrepresentation are high and the risk of imposing external frameworks on local realities is real, this integrity is not merely an academic virtue. It is an ethical obligation to the communities whose lives the research seeks to understand.

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