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The Mixed Blessing of Digital Fieldwork: Digital Security and Ethical Dilemmas of Remote Research during and after the Pandemic

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COVID-19 has markedly impacted the ways we collect research data through field research. As previously discussed in QMMR (MacLean et al. 2021) and elsewhere (e.g., GPPi 2021; ARC Bibliography 2021; SSRC 2020), the pandemic interrupted data collection and knowledge production routines. By restricting travel and free movement, thus impeding face-to-face exchanges, the pandemic and subsequent containment measures affected social scientists and their workflows, in particular those who previously relied on field-based methods. After all, interviews, ethnographic fieldwork, focus groups, and participant observation usually imply the physical co-presence of researchers and their participants, and often build on relations of trust that are established through repeated interpersonal contact. But quarantines, travel restrictions, lockdowns,

social distancing, and even masks have made organizing personal encounters and maintaining and preserving dependable relations of trust with research participants harder—let alone establishing contact with and meeting new interlocutors.

At the same time, the pandemic has catalyzed the spread of old and the development of new online methodologies. The manifold ways in which COVID-19 disrupted qualitative research are outmatched only by the plethora of technical tools for "digital fieldwork" (see Digital Fieldwork 2021) adopted by researchers to compensate for lacking field access. It is safe to say that many of these new practices of doing fieldwork remotely are here to stay, even when field trips to large parts of the world become viable and ethically justifiable again. This is especially true for those technologies that

help translate traditional methods, such as interviewing or focus groups, to a virtual space, while at the same time being cheaper and less time intensive. Yet unlike the pandemic's toll on researchers and their projects and the impact of switching methods of data collection on the validity of the collected data, the corollary of an entire discipline "going digital" virtually overnight has been scarcely addressed in debates on field research during COVID-19.

Digital Fieldwork and Remote Research: An Ambiguous Plan B

Commercial video chat services, social platforms and browser-based applications such as Zoom, Telegram, and Clubhouse became popular as tools for academic inquiry because they promised a quick way out of the bind faced by many researchers during the pandemic. Above all, the early days of COVID-19 were marked by a high degree of uncertainty about the viability, safety, or ethical permissibility of continuing research projects. In the context of a fast-spreading disease, many found that virtual research platforms held a comparative advantage: they relieved researchers of the duty to make a choice between going through with or aborting a planned project, or to draw the line, for instance, at a certain incidence rate. Given the potential health risks for scholars and their interlocutors posed by physical encounters in a situation of scarce information, individual exhaustion and uncertainty about the future, as well as emotional stress and anxiety, conducting interviews and ethnographies online (and thus in less obtrusive ways) even seemed to be the moral choice. Accordingly, many researchers moved their entire projects to virtual spaces as a mechanism to cope with the uncertainty of a rapidly changing pandemic situation. Often, they were encouraged to do so by advisors or supervisors who also found themselves unable to provide sound advice.

To master this shift from offline to online, scholars drew from a plethora of handbooks on virtual research techniques developed in the days before COVID-19 (Boellstorff et al. 2012; Braun, Clarke, and Gray 2017; Fielding, Lee, and Blank 2017; Hesse-Biber 2011; Kozinets 2010; Markham & Baym 2009; Abidin and de Seta 2020). This literature notwithstanding, moving online meant venturing into unfamiliar territory, fraught with risks and ethical dilemmas different to those which most researchers were already acquainted, including the intricacies of online data protection, the question of which archives may be legitimately mined as sources of primary data, the challenges of omnipresent surveillance for confidentiality, and epistemic questions about the power dynamics behind the knowledge produced in and from digital spheres (see Aldridge, Medina, and Ralphs

2010; van Baalen 2018; Grimm et al. 2020; Tanczer et al. 2020; Tanczer, McConville, and Maynard 2016; Rodham & Gavin 2006).

Leveling the Playing Field?

The trend that social scientists "in the digital age" (van Baalen 2018, 2) were also increasingly reliant a digital-data infrastructure of which they often had only a rudimentary understanding was visible even before the COVID-19 outbreak (see Tanczer et al. 2020, 11). The latter only visualized this dependency in more obvious ways. Younger and more tech-savvy researchers especially compensated for a lack of field access by relying on virtual interviews, digital sources, or on local research assistants with whom, again, they communicated via various apps—some of which were launched in the wake of the pandemic.

The pandemic also highlighted how doing fieldwork had been a luxury often enjoyed by those with access to funding, support structures and training, and the right passport. At first, the pandemic seemed to level the playing field to a certain degree. With online surveys and focus groups, participant observations in Clubhouse or video chat sessions, discourse analyses of Facebook groups, the pandemic popularized a set of internet-based methodologies that offered time-sensitive access to research populations and that was equally available to well-funded researchers and those with less access to resources. In addition, the majority of the research community were newcomers when it came to these virtual research practices. This gave less privileged researchers the chance to catch up with the frontrunners. Within certain limitations, junior scholars also gained a certain advantage, because they often found it easier to adapt to and maneuver the new virtual research environment and the modes of data collection it entailed.

But the substitution of established data collection routines by new and often untested practices also catalyzed several worrying trends. In parallel to its partial equalization of research access, the methodological *tabula rasa*, above all, challenged central pillars of safe and ethical research conduct, including the principles of "informed consent" and "do no harm" in the relation between researchers and their research partners.

Outsourcing Data Collection = Outsourcing Risk

Many researchers decided to opt not for a complete shift to digital methodologies but, instead, to rely on local research assistants (RAs) to compensate for the lack of field access. This option was certainly not available to everyone, as the employment of RAs is costly and not funded by every department. Still, the pandemic clearly

reinforced the preexisting trend towards the increased outsourcing of data collection to local researchers. To be clear, the employment of local RAs is not per se an exploitative practice. It often simply reflects the exigencies and constraints at different points in someone's life or career: senior scholars have less time to go on long field trips, and for emerging junior researchers, serving as RAs can be an important stepping-stone in their careers. However, these practices always risk replicating an unequal distribution of burden and merit between both sides involved in the transaction (see Eriksson Baaz & Utas 2019). And the increasing resort to digital technologies tends to conceal this imbalance further. For centuries, the social sciences have maintained a questionable record of rendering local researchers and their work invisible. As Aymar Nyenyezi Bisoka (2020) has noted: "When the time comes for 'difficult' fieldwork in Africa, research assistants become body-instruments, an extension of the bodies of Global North researchers."

Today, Global North researchers are no longer carried on the backs of locals through swamplands, but they do depend more than ever on local experts to maneuver the difficult terrain created by the pandemic. This outsourcing of data collection and analysis also entails the outsourcing of the potential risks incurred during the research process. When projects rely on a complex layer of digital infrastructure as a mediating mechanism for locally collected data, it is not only the local data collectors who are rendered invisible, but also the difficult terrain they face. Not only that, the digital infrastructure itself becomes a potential source of hazard; when projects depend on technology for communication, storage, and joint analysis of primary data, this also means that the burden of coming up with safe internet connections, secure communication technologies, and ways of safely storing data is increasingly placed on local RAs. This is particularly problematic in heavily surveilled field sites where security apparatuses keep a close eye on researchers' communications. Such "hostile environments" call for discretion and for the creation of less, not more, data files, phone records, online paper trails, and other communication at risk of interception (see Mwambari, Purdeková, and Nyenyezi Bisoka 2021, 3), especially if they are produced by people who don't have the option to leave the field site, or for whom "the field" starts right at their doorsteps.

This aspect is often insufficiently considered by project leaders, but also by IRBs and editorial boards. While ethical review boards are usually clear about the measures required of researchers to protect their informants during the collection of primary data, they often don't interrogate how the outsourcing practices may engrain an asymmetric distribution of risks and

merits into partnerships between researchers and their RAs, and by extension, between academics in the Global North and Global South. The cessation of physical travel to a field site may allow the former to avoid health risks and help contain a global pandemic, but if the halted onsite fieldwork is simply outsourced, it can expose the latter to even more to dangerous conditions.

Spatial Separation and Affective Detachment

In addition to increasing asymmetries, digital field work more generally adds a barrier to affective solidarity with the subjects of our inquiries. Remote research simply makes real world problems more remote.

First, it affects the sensitivity of academic researchers towards the everyday needs of their interlocutors. As Kanisha Bond, Milli Lake, and Sarah Parkinson (2020) noted, "a rush to conduct face-to-face surveys with distressed populations; to monetarily incentivize interviews in victimized communities; or to otherwise collect political data from individuals without critical evaluations of the social and scientific urgency of such work greatly risks elevating researcher priorities over research participants' current needs." The employment of remote research techniques that are less conditioned by institutional approval procedures is bound to facilitate these practices.

Second, it affects researchers' awareness of the threats that research participants may be exposed to, an interferes with their ability to "feel" a place. Especially for those that are new to the study of a certain country or context, remote methodologies make it incredibly hard to estimate the risks of their interventions. Supervisors and senior researchers are also less able to provide advice in this situation as they are often not sufficiently acquainted with the technologies used by their students. Consequently, in a fully digitalized, remote research environment, it is much harder for them to assist and to fulfil their duty of care than during classical field research. Mwambari et al. (2021) made a similar argument highlighting how remote research impedes researchers' immersion into the field as well as the trust-building and context awareness that are so essential for planning and conducting safe and sensitive research.

Third, it also concerns researchers' sensitivity to the threat of surveillance. One major problem with the surveillance of digital communications technologies is that it is by definition hard to detect. This problem is exacerbated by many researchers' lack of technical savvy. Every day we make lots of passive, habitual or accidental, decisions that we are not aware of when we use technologies, for instance, by clicking "agree" in some popup window and thereby passively confirming

a user agreement and privacy policy that we neither read nor understand. Not all of these habitual decisions may expose our work to surveillance. But some do, and the predicament is that most of us are in no position to discern which. Consequently, it is hard to calculate the risk from surveillance that researchers and their interlocutors are facing when engaging with each other exclusively through technological media. What is more, the privacy infringements that may result from miscalculation are likely to remain unknown and untraceable (Aldridge, Medina, and Ralphs 2010, 3), thus impeding collective or institutional learning from experiences.

When research institutions approve the use of moderated Clubhouse sessions for focus group discussions, or a specific video software for interviewing, the motives behind this are often laudable. It stems from their realization of a duty of care towards their staff and students, and it often is an attempt to enable safer alternatives than travelling and group meetings during a pandemic. But these calculations often fail to take into account how technologies can also be instrumentalized for intimidation, repression or surveillance—such as when records of video-chats are leaked online to expose participants or when members of Clubhouse sessions are intimidated on-air (Iskandarani 2021). Not only will these abuses of technology remain unknown to those in charge of approval procedures at the institutional level, these individuals are probably not equipped to provide practical advice on handling such incidents.

It is imperative that we start reflecting about ways to reform established institutional practices so as to make them best serve an increasingly datafied profession. This includes pre-field work courses, departmental workflows, and staff training. Where the necessary workflows and support structures at academic institutions are lacking, we should try to develop these in-house capacities and tailor them to the risks that come with increasing technological dependence, for instance, by installing departmental focal points for communication and data security, or by integrating mandatory digital risk assessments into the field work approval process.²

Conclusion

What is worrying is not the shift towards more technology-assisted analysis—an inevitable trend that was there before the outbreak of COVID-19 is bound to continue. Rather, what is worrying is that the increasing dependence on little-known technologies has not yet led to a greater emphasis on digital literacy education

within the profession. Even after one and a half years of webinars, online lectures, virtual focus groups and the like, we still lack compelling answers to the question of how we should deal with surveillance and untransparent technologies. When it comes to the allocation of resources, personnel, and training, we mostly treat digital security as a side-aspect, rather than an integral part of project planning. We still prefer to ignore well-known privacy concerns about certain platforms and tools, when we should instead aspire to understand them better. Even less time has been spent on discussing the practical implications of norms such as do no harm and informed consent for the digital research “on steroids” that we have witnessed since the start of the pandemic.

Before the outbreak of COVID-19, projects like SAFEResearch (Grimm et al. 2020) aimed to come up with practical guidance for researchers on how to take informed and ethical decisions when (re)designing the field work stages of their projects. Crucially, this included the issue of digital security and data protection (89-127). The project aimed to move the discipline from a passive observation of its increasing dependence on little-understood software to a more active decision-making process on the use of technology. Building on this and similar guidance, we should identify and share good practices for moving research online and dealing with ethical ramifications during and after the pandemic. This doesn’t mean we all need to become digital security experts. But we should aim to become more “digitally literate,” to know whom and what to ask, and move from passive towards more active decisions on research technologies—that is to say, conscious decisions which are planned and based on a reliable degree of information.³ Otherwise, we risk undermining the very ethical frameworks we cherish. After all, how much informed consent is possible, if we neither have the ability to grasp nor to comprehensively inform our research partners about the potential risks of their participation?

Unfortunately, this may entail accepting that to some of the most convenient tools that we have grown used over the last years, are potentially the least adequate for research purposes from a safety and ethics perspective. But it also means that we cannot simply try out every new app or software that becomes available for our research in the hope that we might come across a tool that is both safe and easy to use. Pandemic or not, most of us are doing research with real people. Their lives are not a testing ground for new methodologies and software.

² Kevin Koehler has written in more detail about risk assessments as a means to empower, rather than constrain researchers this symposium. For a series of templates for digital risk assessments see Grimm et al. (2020, 94–95, 106, 126-127).

³ Sebastian Van Baalen, METARESPS Roundtable on Digital Security and Data Protection (University of Bologna, Bologna, Italy, May 12, 2021).

Finally, we should stop treating the pandemic as a logistical challenge to be overcome through sophisticated toolkits and the outsourcing of risk. Social science field research has always been defined by unequal burden-sharing between local and foreign knowledge producers. Once we acknowledge how the shift to remote

methodologies feeds into this asymmetric relationship, we can start having a more productive conversation on the parameters and incentive structures needed to steer the evolution of research practices in ways that facilitate the safe and ethical conduct of social inquiry.

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Reflexive Advising: Engaged Mentorship for Safe and Ethical Research Practice

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Political science arrived comparatively late to conversations regarding fieldwork safety. Professional fields such as journalism and humanitarian aid began providing practical training—including first aid and risk assessment strategies—to employees deployed to violence-affected, repressive, and unstable contexts starting in the 1990s (Lake and Parkinson 2017). Like their colleagues in other fields, academics often travel to remote places, examine contentious topics, and rely heavily on local buy-in for access and safety. Even as research in such sites has increased, many scholars report feeling practically unprepared for their fieldwork (Cronin-Furman and Schwartz 2020).

The COVID-19 pandemic, along with other dynamics, has shifted the possibilities for academic fieldwork, rendering "the field" more uncertain for many researchers. Vaccine inequality makes travel to places with high caseloads or low vaccine access ethically fraught. Moreover, the recent targeting of foreign academics such as Matthew Hedges (Siddique 2021), as well as a long-standing trend in many countries of intimidating local scholars (Human Rights Watch 2018; 2021; Kaczmarek and Dubrovsky 2020) demonstrate the need for institutionalized safety practices and education. Yet uncertainty over events and conditions and concerns regarding how to negotiate the late-/post-pandemic context force scholars to ask: How can we develop "best practices" in a realm where there are often no right answers? How do we institutionalize robust research behavior when even well-trained and resourced scholars find themselves in potentially unsafe situations?

While pedagogical literature is beginning to surface on the ethics surrounding advising in graduate training (see, e.g., Eck and Cohen 2020), emergent work around the conduct of ethical research rarely touches upon a cornerstone of academic socialization embodied in the relationship between adviser and advisee. This essay thus argues that what we term "reflexive advising"—where mentors and mentees collectively acknowledge and evaluate how their positionalities may shape their research experiences—contributes a useful additional framework to more individualized, existing approaches to practicing researcher safety. We argue that this relationship is a crucial grounding point for ethical conversations, and one which must center ethical thought and dialogical learning for research design and practice.

Drawing on the authors' experiences working with the Advancing Research on Conflict (ARC) Consortium (Parkinson) and with the Research Ethics in the Middle East and North Africa (REMENA) project (Parkinson and Zayed),⁴ the remainder of this essay broadly outlines researcher safety concerns, then presents an outline for reflexive advising, which responds to emergent calls for a shift to re-balance the burden of safe research between early-career researchers and their mentors.

Relational Risk in the Field

Significant attention has been placed on the ethical and methodological challenges of fieldwork in repressive, violence-affected, and fragile settings (see, e.g., Wood 2003, 2006; Fujii 2010; Ahram and Goode 2016; Campbell 2017; Glasius et al. 2018; Knott 2019; Ryzova 2017; Grimm et. al. 2020; Krause 2021;

⁴ The Advancing Research on Conflict (ARC) Consortium was founded in 2018 to foster methodologically robust, ethical, context-sensitive research on conflict and violence. The REMENA Project (REMENA 2020) is "dedicated to mobilizing an interdisciplinary network of academics, researchers and practitioners to assess the landscape of social science research conducted in the Arab world and develop guidelines for the conduct of responsible, ethical and constructive social inquiry."