

Field Research in Environments of Insecurity Experience from Lebanon

HOURANI, Guita

Although academic institutions and organizations have provided extensive ‘Research Guidelines,’ or ‘Ethical Guidelines’ or ‘Codes of Conduct for Researchers’ to direct work with regards to the ways in which investigators conduct, administer, and convey field research, the generally provided valuable guidance seems deficient relative to the rather particular conditions that research in non-western and non-democratic states dictates. The guidelines are even more inadequate when the research is conducted in environments of insecurity in these states. Implementing fieldwork in environments of insecurity is a complex and challenging undertaking not only for foreign researchers but also for nationals. In the volatile Middle East and similar milieu, where insecurities are the result of conflicts, human rights abuses, oppression of minorities, field research is even more intricate and difficult. While this article argues that a) researchers should not wait until the insecurities are over to conduct field research; b) that researchers can do quantitative and qualitative research in environments of insecurity; and c) that Snowball Sampling Method (SSM) is an effective method of reaching out and accessing marginalized and “hard-to-reach population”, it outlines methodological, socio-cultural and ethical issues related to conducting field research in these environments taking the case of Lebanon. This article also alerts to the need to pay vigilant attention to the social and political context within which field researchers operate. It is, thus, concerned with political and security readiness, pre-field research preparation, contextual methodology, and sampling approaches, identifying and locating interlocutors, availability and accessibility of data and information and the special ethical concerns that “on-the-ground” research entails.

Introduction

Political and Security Risks

Sources of information

Environments of insecurity

Anti-Western feeling

Connection with Israel

Sensitive topics

Preparation before Heading out to the Field

Skill and knowledge acquisition

Cultural familiarity

Practical and Methodological Issues

Hard-to-reach population and snowball research strategy

Language and knowledge barriers

Keywords: Environments of insecurity, field research, research methodology, Lebanon, Middle East



Data security
Data Availability and Accessibility

Ethical Concerns
Conclusion

Introduction

The Middle East in general, and Lebanon among other nations in this part of the world, in particular, affords researchers great opportunities for “on-the-ground” field research in almost all the disciplines. However, conducting this fieldwork poses enormous challenges to both national and foreigner researchers beyond those encountered in non-conflict environments. The region is troubled with violence, political authoritarianism, human rights abuses, anti-Western sentiments and profound cultural differences which make it discouraging to conducting fieldwork. Although the Middle East and Lebanon are considered among the most dangerous places in the world, the danger is “mostly political in nature” (Romano 2006: 439). However, political and non-political dangers can never be dismissed especially as “new forms of war and non-state armed actors blur the lines of the battlefield” (Malejacq and Mukhopadhyay 2017: n.p.) and as authoritative states and failed democracies increase their control and restrictions. Overconfidence in this area can lead to adversity on the practical, methodological and ethical levels, but dangers and challenges can be limited if one comes into the field with proper preparation, careful implementation, flexibility, and an overtly ethical comportment -- this makes the daunting task of working in environments of insecurity at least do-able (Dixit 2012: 133).

An environment of insecurity is not necessarily one of actual violent conflicts or wars. Rather, it denotes a broader scope of adverse socio-political and cultural situations. An environment of insecurity threatens human security in terms of human life and dignity (UNDP 1994: 22). Human insecurity includes among other issues “political and social exclusion and inclusion, involuntary and voluntary movements of people, protection and empowerment of women, recovery from conflict and the role of reconciliation, and aspects of governance and participation, food security, health security, and education, skills and values” (United Nations Office of the Special Adviser on Africa 2005: 2).

In this article the environment of insecurity encompasses not only hostile environments caused by wars between two or more government forces, conflicts between government forces and non-state actors (e.g. armed political, ethnic or tribal groups), but also environments where human security is deficient and freedoms are curtailed in not-so-friendly regimes (e.g. totalitarian, authoritarian, military and para-military, failed democracy, or transitioning regimes).

For researchers, most guidelines on fieldwork research consider that research takes place in conflict-free settings (Haer and Becher 2012: 1); as such, they do not equip researchers with skills appropriate for environments of insecurity. This lack of consideration is due in large part to the

attitude that insecurity makes it unfeasible to collect valid and reliable data (Haer and Becher 2012: 1), that conflict causes mobility and marginalization of the population which makes it hard to reach and access (Cohen and Arieli 2011: 423), and that serious research has, therefore, to wait until the hostility stops (Goodhand 2000: 12). Such a lack is at the heart of recent discussions on conducting fieldwork in an environment of insecurity, and which in turn have to do with the above-mentioned attitudes. In her e-mail survey of political scientists who conducted field research in the Middle East, Clark found that paramount challenges are those related to the political conditions rampant in most of the countries in the region (Clark 2006: 418). She also found that 67% of her survey respondents “received no formal training of any kind or that they were either inadequately or insufficiently trained in qualitative methods by their departments” (Clark 2006: 421). Apparently, methodological applications applied in Western countries are not applicable in their entirety in non-Western countries. However, as Cohen and Arieli argue, Snowball Sampling Method (SSM) is an effective method to reach out and access marginalized and “hard-to-reach population” and it can “actually make the difference between research conducted under constrained conditions and research not conducted at all” (Cohen and Arieli 2011: 423). As for shying away and abandoning fieldwork in environments of insecurity, Romano, who has conducted research in the Kurdish regions of Turkey, Iran, Syria, and Iraq, Lebanon and in Israel-Palestine, posits that “nothing risked

nothing gained” (Romano 2006: 441) and encourages researchers to venture out for research in such environments.

The attitudes that are mentioned above were at the core of the author’s own research activities, particularly in Lebanon. Questions related to whether the environment of insecurity is feasible to collect valid and reliable data, whether she could reach and access the target population, and whether to wait until the hostilities and post-hostility situation are over are some of the questions that she had to ponder upon before she takes on the research.

This article, which is born out of the author’s own experience, builds on the contributions of Clark, Cohen and Arieli, and Romano by sharing tales from her own fieldwork. After the introduction that constitutes the first section, the remaining sections proceed as follows. In the second section, she discusses security and political risks and measures to contain or circumvent. In the third section, she addresses the pre-preparation needed before heading out to the field. In the fourth section, she attends to the practical and methodological issues and how to overcome them and recommends the use of SSM as a method. In the fifth section, she tackles the issues of data availability and accessibility. In the sixth section she deals with some ethical concerns and in the seventh and final section, she presents her summary and discussion.

Political and Security Risks

Sources of information

One of the first steps in preparing

to do safe and successful fieldwork in Lebanon or the region is for the researcher to familiarize himself/herself with the published sources on the country and its various regions where the research will take place prior to venturing out into the field. Seeking out the insights of other researchers, colleagues, friends, and journalists who have recently been to the country is a valuable source of information. Monitoring the political and security situations in the country in which they plan to conduct their research using multiple media sources is a good tactic to be abreast of any security threat. By cross-referencing the information obtained from these various sources, researchers will be able to produce a reasonable pre-field map of the territory in advance, estimate the risk level, and decide whether to proceed or not. In the light of this information, researchers must also envision the operational method they will need to employ in order to make sure that no harm comes to them, their associates, or their informants.

Another important step in finding information about political and security risks is checking the travel advisory information which is published and regularly updated by foreign ministries, prominent companies, and international institutions. If their respective organizations do not have a travel advisory, researchers may check the travel advisories of first-world countries' foreign ministries or international organizations such as the United Nations regarding any travel bans or warnings.

Environments of insecurity

Prior to arriving in the country where

the research will take place, it is advisable for the researchers, as a precaution, to inform their respective embassies or consulates missions of their arrival date. It is also sensible to register with the embassy or consulate, to give their residence address, phone number, and email, and to inform them of their whereabouts. This is especially urgent if they are venturing out to environments of insecurity, particularly active conflict zones. It is also prudent to give information to these officials about their mode of transportation and the persons accompanying them, including the driver and his phone number. Finally, it is important to obtain and keep handy contact information from these consulates or diplomatic missions for emergency situations to facilitate assistance if needed.

Conducting research in environments of insecurity undoubtedly entails some risks; after assessing the level of risk, researchers, for example, should devise exit scenarios and safe escape routes. Due to insecurity in Lebanon, which was plagued by political violence due to various inter-sectarian incidents, the author, in conducting her fieldwork on the impact of naturalization on socio-economic and political participation of the Kurds of Lebanon in 2010–2011, needed to adapt her research to the protocols proper to an environment of insecurity. This meant being prepared to call off the fieldwork when the risk becomes unacceptable (Romano 2006: 439). Going into the field for this research, the author enjoyed the advantage of knowing the terrain, which helped her read non-tangible indicators in addition to monitoring the news for signs of increased risks. Her target was to

survey 240 persons, but in the prevailing environment of insecurity, she was able to survey only 164 persons. She cut off the survey process before reaching her target sample due to the fact that she became increasingly alarmed by the environment of mounting tension in the city of Beirut, which presented dangers that were encountered by her and her team. Following the clashes that took place between Hezbollah¹⁾ and the *Ahbash*²⁾ in Burj Abi Haidar neighborhood in Beirut, there were several deaths, which, most notably for her study, included the death of a Kurdish young man who was the son of one of the Kurds' leading figures and kin to the largest Kurdish family in the country. Concurrently, political frictions in the country were heightened by an atmosphere of distrust that came about in the wake of the dismantling of several Israeli intelligence networks, leading to a witch-hunt for "information seekers". Evidently, survey takers are easily targeted in this atmosphere. As the political rhetoric among Lebanon's competing political factions intensified, the general environment became visibly risky for the field surveyors (Hourani 2011: 47). Consequently, the survey was called off, and the team was extracted from the field following the environment of insecurity protocol that was devised at the onset of the research.

Whether researchers admit it or not "research is a political act" (Sharoni 1999: 2); as such, researchers have to be cautious

of their actions particularly when it comes to their involvement in the community they are studying. In her experience, the author was called upon to assist a foreign affiliate researcher who was incarcerated by the authorities in Lebanon pending deportation. The affiliate researcher was conducting anthropological research in one of the Palestinian camps. Rumors sprang up that he was interfering in the internal political affairs of the camp. The truth was that he believed in the Palestinian cause and was trying to help with apparent zeal. An atmosphere of suspicion of him by both the community and the authorities surrounded him to the extent that the author had to make calls to various governmental and military personnel to guarantee the safety and departure of the affiliate.

In environments of insecurity, certain areas necessitate special provisions before entering them. Following the cessation of hostilities between Hezbollah and Israel in the summer of 2006,³⁾ the author planned an identification mission in 2007 to collect information for a feasibility study on the migration of the Christians from the Lebanon-Israel border villages. In preparing for this mission and to prevent any suspicions and to guarantee proper and safe exit in case hostilities were resumed between Hezbollah and Israel, she informed not only the Lebanese Armed Forces (LAF) and the UN Interim Force in

-
- 1) Hezbollah is a Shiite Islamist militia, political party, social welfare organization that operates in Lebanon and aims at creating a fundamentalist Islamic state in Lebanon. Hezbollah is represented in both the Parliament and the Council of Ministers in Lebanon.
 - 2) The *Ahbash* are a Syrian-backed Sunni organization.
 - 3) The "July War" or the "Summer 2006 War", or the "Second Lebanon War" was a 34-day full-fledged military conflict between Hezbollah in Lebanon and the Israel Defense Forces (IDF). The hostilities that devastated Lebanon's infrastructure lasted 34 days.

Lebanon (UNIFIL) in the region, but also Hezbollah. She provided the names of her team members, copies of their IDs, the type and plate numbers of the vehicles used to enter the region, as well as the subject of her mission. After this, she was allowed to complete her project without interference.

Anti-Western feeling

Researchers must be aware of the level of anti-Western sentiments within the environments of insecurity particularly conflict and post-conflict zones. Any stranger asking questions might be suspected as working for the CIA or other intelligence agencies even if they are not Americans. Nor is this sentiment entirely fanciful: “it is common knowledge that at least some spies and spooks come in academic disguise and that some U.S.-based scholars sell their expertise to the CIA or the Pentagon” (Carapico 2014: 27). Consequently, some of the Westerners may be targeted by the government or by political or armed groups in the country. The anti-Western feelings are contingent upon who the perceived “enemy” at the time of the researchers’ stay in the country is. This leads to yet another important issue regarding research ethics here that is concerned with the interviewees. Some of the interlocutors may be compromised and consequently risk being arrested, tortured, or even executed for speaking with a ‘marked’, ‘identified’, or ‘targeted’ researcher.

It is important to have in mind and be prepared for contingencies that are absent from non-environments of insecurity field research: researchers might be followed, face seizure of their research data, be arrested or detained, harassed by the

police, or intimidated by non-state-actors (e.g. political parties or armed groups). Researchers also need to be well prepared and need to continuously monitor the international and local political situation. It is a good idea to obtain advice from local contacts in order for researchers to protect themselves and proceed with their research as safely and efficiently as possible.

Connection with Israel

Precautions should be taken in regard to any compromising documents or other items that would be problematic. One of the most important documents that researchers should not have when entering Lebanon, for example, is anything related to the State of Israel. A passport with evidence that the researcher has been to Israel (visa, sticker, stamp), or any material in the Hebrew language, or anything that relates to his/her connection with Israel, will be viewed negatively. Having such evidence will cause him/her to undergo extensive interrogation and might land him/her in prison. A foreign research affiliate friend of the author, who had been to Israel prior to her visit to Lebanon to conduct her research, was compellingly advised to stay in Jordan while waiting for a new passport from her embassy before coming to Lebanon.

Sensitive topics

Some researchers whose subjects are sensitive or deal with issues that involve “national security” threats may be covertly followed, watched or listened to. Research on terrorism or anti-terrorism is practically dangerous if pursued without going through the proper training and preparation before

advancing to the fieldwork stage, and/or failing to secure the right protection from within the studied group.

Researchers conducting research or fieldwork in the Middle East deal with mainly totalitarian, military, and paramilitary systems. Given the prevalence of conflict in these regions, it is unsurprising that one would encounter paranoid environments, which means that their concept of the right to information, transparency, freedom of speech, freedom of movement, freedom of assembly (even meeting with one person) and the like is not a given. With politicized cultural differences related to religion, gender, race, and social status, certain topics are considered taboos (e.g. sex, HIV, mental illnesses, political regimes, corruption, armed groups, oppression, freedom, Israel, etc.). Both foreign and local researchers need to tread carefully when discussing these subjects.

Researchers, therefore, should always remember that “conflict zones are not places for free intellectual debate and objective discourse” (Romano 2006: 440). In a case when the researcher is stopped by an armed group or by a member of the government apparatus for questioning or interrogation, it is best for him/her to be cooperative, diplomatic, patient, non-partisan, non-committal, and truthful. It is advisable for the researcher not to sound or look partial, taking sides, or showing engagement in moral or political discourse. Thus, it is prudent to remain neutral and objective and not to allow the situation to lure him/her into a political or moral debate in a place where emotions run high and political and moral standing are non-negotiable.

Preparation before Heading out to the Field

Skill and knowledge acquisition

Novice researchers are sometimes ill-prepared to do field research. In order to overcome some of the more basic challenges in conflict-zone areas, it is advisable to have strong training in setting up survey methodology, conducting interviews, designing questionnaires, and non-statistical sampling, among others. It is advisable to collect lessons from their professors, colleagues, previous researchers, and others who have done similar research in these target geographic areas, where relationships that have been forged in past studies may be of use today.

One of the most effective ways to prepare for the fieldwork is to request contact names in the targeted geographic area from professors, researchers, alumni, field workers, diplomatic staff, international staff, aid agencies, journalists, family members, and friends. These contacts can be proven invaluable at the onset and during the fieldwork in the country. Of course, it is important not to be trapped within the same network that was developed by others, but these contacts can be used to expand networks to create new sources.

Similarly, prior to arriving in the country, researchers need to do thorough research on the targeted geographic area for institutes, NGOs, universities, hospitals, companies, organizations, municipal mayors, religious leaders, etc., all of which might help to legitimate them in the eyes of the population and make suggestions about possible survey and study targets. These affiliations should be concretized through the use of letters, which will introduce the researchers and

their work, even to the extent of facilitating their legal entry into the country (visa). Using this affiliation accelerates and eases the strain of making contacts on the ground, increases their “legitimacy” in the eyes of the community, gives them a platform to discuss their work with peers, allows them access to otherwise unattainable information/data, and provides them with advice on dos and don’ts. It is important for researchers to obtain International Travel Insurance as part of their provision for traveling.

Cultural familiarity

Researchers need to know about the cultural aspect of the society in which they are conducting their research, especially in terms of how to dress, how to address and greet people, and learn about certain gestures that are inappropriate or offensive. A foreign researcher was shunned by the collectivity where she was conducting her fieldwork for her dress, which, by that community’s standards, was not proper. Another foreign researcher was embarrassed because she extended her hand to shake that of a member of Hezbollah who did not reciprocate her gesture and who bluntly told her that she should know that he does not shake hands. It should be noted here that foreign women researchers “frequently do face harassment... These experiences range from the truly unsettling... to more benign practices...” (Schwedler 2006: 426). There are many ways to get around such acts. One is to wear a wedding ring. Another is to wear conservative or modest dresses appropriate for the context. And yet another is to have a male assistant or interpreter from the country. Sometimes it

is necessary for female researchers to wear a head covering and long-sleeved attires that do not “accentuate the contours of the body” (Schwedler 2006: 426) particularly when interviewing religious leaders or Islamists—this can be done out of respect even if it is not required.

Practical and Methodological Issues

Hard-to-reach population and snowball research strategy

Researchers conducting studies on sensitive matters face many methodological challenges, particularly if they are conducting quantitative research. Quantitative research itself, employed in regions where statistical data is unreliable, outdated, inequitable, or inaccessible and where accessing hidden and the hard-to-reach population is impenetrable, tends to be problematic.

The Middle East in general and Lebanon in particular lack standardized, reliable, up-to-date, equitable, and accessible data. Therefore, it is difficult to find official anchoring points for conducting quantitative research in these areas. For this reason, much of the social research undertaken is qualitative rather than quantitative in nature. In addition, due to political, demographic, and social particularities in these areas, “hidden”, “hard-to-reach”, “concealed populations”, or difficult to enumerate populations are best accessed through the use of “snowball” research strategies (Kirchherr and Charles 2018: 1). Among these populations are those including but not limited to: minority or marginalized groups, people with deviant sexual behavior, homeless people, prostitutes, people with rare diseases (e.g.

HIV), illegal or out-of-status immigrants, refugees, people working in the black market, militants, terrorists, insurgents, secessionists, separatists, warlords, war criminals, arms dealers, drug dealers, drug consumers, and the like.

To reach out to these groups, researchers are compelled to use more often than not “snowball interviewing” which is the best afforded qualitative technique in these circumstances. Snowball research strategies afford researchers a practical and advantageous method to reach these target populations. “Snowball interviewing” is thus used as a method of identifying/locating interviewees; it is a chain referral mechanism. Snowballing is used to identify interlocutors with certain required attributes who are either small in number, or who live in environments of insecurity and particularly in conflict zones or are hard to find physically because of situations associated with the topic or the circumstances of the individuals themselves, or their environment, or any combination of the aforesaid properties. It is especially beneficial when other data is not available or accessible; it is also helpful when used as complementary to the data obtained. When applicable, researchers are advised to obtain approval from the Internal Review Board (IRB) for the use of snowball sampling which must include justification of the use of this method in the context of the study and target population.

During her fieldwork with the Kurds of Essen in Germany, the author faced an environment of insecurity that she did not anticipate. This environment of insecurity was due to the fact that the Kurdish community members in the city (about

2000 people), who carry expired residency permits from Lebanon and who have not gained citizenship in Germany, were living in a state of anxiety due to their status. The author found out that Germany wanted them to return to Lebanon or to Turkey and that discussing anything related to their migration status would have been faced with rejection. The author had to contact the Kurdish elected representative to the local government, present her credentials, and mention the name of her referral from Lebanon in order to gain his trust to do her research using Snowball Sampling Method (SSM). The representative opened doors for her in the community and in the government, encouraged members to accept being interviewed, and accompanied her to some of the meetings she conducted.

In the Middle East and Lebanon, referrals are crucial, as social, tribal and familial networks endure through generating reputations in the community. Researchers here need to understand that in the majority of cases a letter of introduction from a locally well-known person, or an institution, or a university will go a long way in facilitating one’s work. Researchers need to be aware that sometimes the same letter might work against them if the person or the institution is an adversary of the person(s) sought for an interview. In this case, it is advisable for the researcher to seek out the advice of their assistant and/or a trusted and knowledgeable contact(s).

Finding interlocutors and having them agree to be interviewed take time. The researcher must possess patience and flexibility since research in conflict areas cannot be rigidly pre-determined and carried out. Accordingly, researchers need

to factor time, patience and budget in their plan for the fieldwork. The more sensitive the subject and the more the “hidden” or “hard-to-reach” or “concealed” the target group is, the more the need arises for flexible scheduling and planning. It is equally important in societies that are divided or diverse to interview people on both sides of the divide and give equal opportunities to both sides to present their views.

Identifying persons from the target group to initiate snowballing can begin by asking professors, alumni members, friends, social network members, and colleagues to name one or more persons in the target population. Finding NGOs and civil society institutions that work on or with the target population is another effective route to reach potential interlocutors. Researchers must be cautious about feedback obtained especially when a group is sampled too narrowly by repeatedly surveying the same people or their associates. Diversifying referrals is a good tactic to use in this situation.

Researchers may use a third party (e.g. a local institution, a translator, a professor, a friend, or an assistant) to make initial contacts with individuals or organizations in order to facilitate introductions, secure meetings, or bring about interviews. Local and international organizations actively working in the geographical areas of the researchers’ research interest are in many ways instrumental in providing useful insights, identifying sensitive issues, and providing access to potential respondents. In her field research on the Syrian Armenian refugees in Burj Hammoud in Lebanon, the author contacted an

Armenian International organization with a well-established branch in Lebanon to cooperate with her on the ground in order to reach “hard-to-reach” members of the community. She opted for this organization not only because it had access to the target population due to knowing and serving them, but also because it is highly trusted by the members of the community. This reputational capital was important. Its social services staff knew the whereabouts of community members; they spoke fluently in both Armenian and Arabic, and they could both interpret/translate the questionnaire and facilitate the interview process.

Language and knowledge barriers

In conducting fieldwork, researchers should take into consideration that some segments of society may not be literate, while others might not fully comprehend the survey instructions, technical terminologies, or jargons. Certain questions/concepts do not translate clearly, hence the need for face to face explanation. Linguistic facility and comprehension are more necessary in very structured interviews/questionnaires, especially if the researcher is reluctant to alter them for fear of invalidity of the results. In this situation as well as in all situations when a foreigner is conducting fieldwork, the aid of local bi-lingual research assistant is crucial. In addition, collaborating with local experts in, for instance, discussing the survey questionnaire and/or the interview questions can prove to be highly beneficial for avoiding miscomprehension, puzzled silences, or flat out rejection.

In Lebanon, the author employed local

assistants from the target regions where her fieldwork projects were conducted. In working on the Syrian refugees in four different geographical areas in Lebanon (Akkar, Tripoli, the South, and the Bekaa), for example, the author hired trained surveyors and social assistants who lived and worked in these geographical areas. Several reasons were behind this decision. Firstly, they have a good knowledge of their terrain, which in conflict areas (where invisible boundaries down at the street level might divide hostile communities) is a must. Secondly, they already possess access to the various boroughs in these geographical areas. Thirdly, they possess what the philosopher Michael Polanyi called “tacit knowledge”: they could find information, whether of where some person lived or who, in the community, was a leader, for instance, through their local networks.

Data security

Above and beyond precautions taken by researchers to protect themselves, the identity of their sources, and the data obtained, researchers may want to take further steps to avoid electronic surveillance when in the field by not going online on their computers. They may also make extra copies of important documents and place them in a safe place or with a trusted person. Researchers should encrypt their interviews on their computers, and use all means to protect the recordings and the photos on cellphones or video cameras, especially if they are sensitive. Falling in the hands of the government, or any antagonistic group, “sensitive” information and data “can be treated as

potential evidence” (Parkinson 2014: 24) and consequently cause serious problems for the interlocutors and the researchers.

Data Availability and Accessibility

As mentioned before, the Middle Eastern region in general and Lebanon in particular lack statistical information/data. In the case where the data is available, it may be inaccurate or have been collected with a bias, and might be highly political; and even if the data is theoretically available, accurate, and non-political, it still may not be actually accessible unless the researchers have the correct credentials or contact. In some cases, government employees might unofficially provide the information/data for whatever reason, or for a bribe. In the latter situation, it is better to have a local assistant or companion handle the transaction (Romano 2006: 440). However, researchers need to know that they may not be able to use the obtained information/data because it was not obtained officially. If they want to include it in their final report, they will have to explain why the information/data needs to be used to the IRB of their respective institutions prior to using it.

Researchers should not be surprised if access to archives is denied, or if the target archive turns out not to allow access to the material needed to be examined. Census figures may not be available or accurate enough to allow for representative sampling or sample size. A researcher might have to rely on other sources, such as that provided by international organization information, school counts, electoral logs, NGOs local or international, phone books,

and syndicates (engineers, labor, doctors, etc.), cross-referencing them with other sources.

The researcher should expect to find some difficulties in the path of accessing and interviewing government officials or getting them to release information/data. Although depending on the subject, at other times government officials make themselves oddly available, at this time they will probably follow the “party line” in their responses. Or they will give personal views that might not be based on anything objective.

Researchers who are used to the 24/7 ethos of developed nations might at first be frustrated by the intermittency of internet access and the restrictive opening hours of institutions. They may also be faced with cancelations of appointments, defaulting on promises, and the like. Researchers need to pay attention to long holidays in the country of their interest and need to realize that summer in general and August, in particular, may be difficult times to conduct fieldwork or to do research due to target groups unavailability, travel, internal summering in villages, and closing of universities and archives. Everything takes longer, so researchers are advised to factor this in their scheduling. Logistical consideration must be taken into consideration as well.

Researchers are well-advised to have produced a pilot or feasibility study before embarking on the final proposal and its attendant tasks, like purchasing a travel ticket. Not speaking the language is also an impediment, especially in qualitative research, and will require a good translator/interpreter. Telephoning

people presents a set of problems. Technically, telephone service might not be continuous in conflict areas. WhatsApp, for instance, will probably not work as well. More importantly, people might not answer questions on telephones for fear of being listened to (which is probable in conflict areas in the Middle East) and for not knowing the person on the other end of the line in a face to face relationship. Culturally, using the telephone for interviewing is not often done and may be considered too odd.

In today’s globally connected communication technologies, nothing is a “secret” anymore. The time when researchers could come home to a Western country and publish research, secure in the knowledge that their respondents would not read it, is long gone. Researchers should know that even if they publish abroad, the corresponding publication or excerpts might reach the country and community in which they did their research. This puts a moral responsibility on researchers, who should strive to write about their findings in such a way that they avoid doing any harm to their sources or the community.

Ethical Concerns

Speaking openly about sensitive issues may cause discomfort for some respondents. Others might speak incautiously in response to the researcher’s queries, failing to realize the risks they face. It is thus the ethical responsibility of the researchers to inform their interlocutors about those risks; furthermore, all necessary steps should be taken to protect

sources. With the downside of snowballing in conflict areas being that interviewees may be able to trace each other, researchers should never discuss with one interviewee the names or the profile of another. This is an elementary principle that protects the anonymity of interlocutors, especially when the topic is highly sensitive. The baseline of 'do no harm' is recognized as an important basic principle in human field research. Researchers "must abide by principles of informed consent and confidentiality for interviewees and avert exposing them to any undue physical, social, and psychological risk" (Pearlman 2014: 8). Research into human suffering needs to have other purposes than conducting the research itself; it should ultimately be intended to contribute to alleviating or ending that suffering (Jacobsen and Landau 2003: 186).

Obtaining the verbal or written consent of the interviewees, confidentiality, and granting anonymity when it is applicable, as well as maintaining neutrality and objectivity are rules researchers should not deviate from. Shortcuts around these procedures might bring about long-term harm, which redounds not only on the respondents and their community but on other researchers as well, who will be blamed, by association, for the mistakes of their peers.

Often, researchers are confronted with interviewees expecting or requesting services. Whatever answers one gives, researchers should never promise more than they can deliver. In her research on the Kurds and the Syrians in Lebanon, the author was told on several occasions that these communities had been over-

researched and that nothing improved in their lives after the research was done. The implication was the research was a quid pro quo. Her answer was that she does not have the political or economic pull to alter their situation, but that what she could contribute, through the job of writing about the community and the issues that its members face, is to make visible their issues and lifestyle problems and add credibility to these concerns. The only promise she made was to make her findings available and accessible and to bring up the issues of concerns in meetings with decision-makers and international organizations and advocate for change when she had the opportunity. Also, she could encourage NGOs and civil society institutions to provide their communities with needed assistance. More generally, researchers might offer small favors such as help in filling out forms or writing letters, or, on a larger scale, teaching English in the community, conducting workshops on project management, proposal writing, or teamwork, and the like.

It is not easy to maintain a healthy distance between the researcher and the interlocutors. While researchers must earn the trust of the community, they need to not fall into the trap of identifying with them. Maintaining distance is necessary, even when offering assistance. Researchers are advised to share their previous work and make it available to the community, as well as allow the participants to review the part attributed to them (Sharoni 1999: 3). Researchers should be aware of their own body language (e.g. nodding) because it might mean that the researchers agree with the respondents; they also need to

know that some sayings have different connotations - for example, Romano found that when Middle Easterners say "*bukra inshallah*" "tomorrow, Godwilling"! they actually mean "Forget about it" (Romano 2006: 440).

Perception matters in fieldwork; in many environments of insecurity, race, gender, religion, identity or nationality matter to the interlocutors who are the subject of research. At times due to any of these attributes or a combination of them, researchers are denied access or are received with open arms. The author construes out how several aspects of her identity as a Maronite and a female, had specific effects on her fieldwork with the Kurds. The author was refused access on some occasions due to her being a Maronite Christian, which was, in turn, a spillover from the challenge mounted by the Maronite League to the naturalization decree of 1994 (as mentioned previously) in which around 10,000 Kurds were naturalized after being residents with special permits since the 1920s. This meant to some members of the Kurdish community that the author was "spying" on them. The author predicted this behavior and planned to dispel stereotyped impressions that Kurds had about her through pre-field-work meetings that she conducted with various Kurdish organizations and clubs and with the Future Movement (*Tayyar al Mustakbal*)—the political party that most Kurdish Lebanese adhere to. In addition, she had made a flyer about the objectives of her research which also included a short biography of her and her personal number to show good faith in the Kurmanji and

Arabic languages and distributed it during the Kurdish Newroz Festival celebrated in March to welcome the beginning of spring.

Conclusion

Illustrated with some personal anecdotes from the author's own experience, the issues discussed in this article are illustrative and not exhaustive; and while they may be fully or partially related to challenges faced in research conducted in environment of insecurities particularly conflict and post-conflict zones in various parts of the world, their context speaks to the problems awaiting researchers who study the Middle East and Lebanon.

As indicated in this article, extra attention must be paid to the level of political and security risks, with the need to pre-prepare one's fieldwork and travel prior to heading out to the country of interest; these security concerns even touch on the methodological issues that are employed in the research, as, for instance, the way in which snowballing strategies may allow the researcher to be "tracked". As well, researchers will have to deal with problems involving data availability and accessibility and ethical concerns. All of the above-mentioned challenges, risks, and complications have to be addressed as these are serious issues that, in the worst case, can become life-threatening. However, it is equally important to reflect on the tactics used to overcome challenges as presented in this article. This means that researchers should not wait until the insecurities are over to conduct field research; quantitative and qualitative research in environments of insecurity is possible and doable as

Snowball Sampling Method (SSM) is an effective method to reaching out and accessing marginalized and “hard-to-reach population”.

Researchers are responsible for conducting serious inquiry and contributing to the production of knowledge in their fields. Environments of insecurity especially conflict and post-conflict zones in the Middle East are particularly relevant globally and need much more research. It is not the point of this paper to deter researchers from conducting field research in the region, but to present a realistic picture of the fieldwork context from the perspective of the author. By no means is the author suggesting leaving the field to government disinformation campaigns, biased diplomatic reporting, intelligence reconnaissance, commercial media, or yellow journalism. Research in these areas is possible and needed. Without it, tragically, voices from the region will not be heard, and people’s situation will not be improved.

References

Carapico, Sheila. 2014. “On the moral hazards of field research in Middle East politics.” *The Ethics of Research in the Middle East*, Program on Middle East Political Science Studies, 8: 26–29. http://pomeps.org/wpcontent/uploads/2014/07/POMEPS_Studies_8_Ethics.pdf.

Clark, Janine. 2006. “Field research methods in the Middle East.” *PS: Political Science and Politics*, 39(3): 417–423.

Dixit, Meha. 2012. “Field Research in Conflict Zones: Experience from India and Sierra Leone.” *International Studies*, 49(1&2): 133–150.

Goodhand, Jonathan. 2000. “Research in Conflict Zones: Ethics and Accountability.” *Forced Migration Review*, 8: 12–15.

Hourani, Guita. 2011. “The Kurds of Lebanon: Socioeconomic Mobility and Political Participation via Naturalization.” *LERC Research Paper Series 1/2011*, The Lebanese Emigration Research Center, Notre Dame University. Available at: www.ndu.edu.lb/Lerc/researchpaperseries/thekurdsoblebanon.pdf.

Jacobsen, Karen and Loren B. Landau. 2003. “The dual imperative in refugee research: Some methodological and ethical considerations in research on forced migration.” *Disasters*, 27(3): 185–206.

Kirchherr, Julian and Karina Charles. 2018. “Enhancing the sample diversity of snowball samples: Recommendations from a research project on anti-dam movements in Southeast Asia.” *PLoS one*, 13(8): e0201710.

Malejacq, Romain and Dipali Mukhopadhyay. 2017. “Yes, it’s possible to do research in conflict zones. This is how.” *The Washington Post*, 5 April. Available at: https://www.washingtonpost.com/news/monkey-cage/wp/2017/04/05/yes-its-possible-to-do-research-in-conflict-zones-this-is-how/?noredirect=on&utm_term=.56eeb4d586a52017.

Parkinson, Sarah Elizabeth. 2014. “Practical Ethics: How U.S. Law and the “War on Terror” Affect Research in the Middle East.” *The Ethics of Research in the Middle East*, Program on Middle East Political Science Studies, 8: 24–26. http://pomeps.org/wpcontent/uploads/2014/07/POMEPS_Studies_8_Ethics.pdf.

Pearlman, Wendy. 2014. “Ethics and Research on the Middle East.” *The Ethics of Research in the Middle East*, Program on Middle East Political Science Studies, 8: 7–9. http://pomeps.org/wpcontent/uploads/2014/07/POMEPS_Studies_8_Ethics.pdf.

Romano, David. 2006. “Conducting Research in the Middle East’s Conflict Zones.” *PS: Political Science and Politics*, 39(3): 439–441.

Schwedler, Jillian. 2006. “The Third Gender: Western Female researchers in the Middle East.” *PS: Political Science and Politics*, 39(3): 425–428.

Sharoni, Simona. 1999. “Doing Research On/ With Women in Conflict Zones: Some Ethical Considerations.” Available at: <https://www.simonasharoni.com/app/download/4879053/Ethics.pdf>.

Sirkeci, Ibrahim. 2006. *Environment of Insecurity in Turkey and the Emigration of Turkish Kurds to Germany*. New York: Edwin Mellen Press.

United Nations Development Programme. 1994.

Human Development Report Series. New York and Oxford: Oxford University Press. Available at: http://hdr.undp.org/sites/default/files/reports/255/hdr_1994_en_complete_nostats.pdf.

United Nations Office of the Special Adviser on Africa (OSAA). 2005. *Human Security in Africa*. https://www.un.org/ruleoflaw/files/Human_Security_Africa_2005.pdf.

Accepted on 10 July 2019