

Global Media Journal

German Edition

Special Section – From the Field

Remotely Accessing the Field and Building Trust with Distant Sources. Perspectives from Journalism Practice for Ethnographic Research.

Laura Gianna Guntrum, Mira Keßler, Jignesh Patel, & Anna Varfolomeeva

Abstract: Journalists and ethnographic researchers, such as anthropologists, sociologists or media scholars, have comparable ways of establishing initial contacts with people from their fields of interest. Due to the ongoing COVID-19 pandemic and consequential travel restrictions and social distancing, it has become increasingly difficult to access a field. Taking inspiration from social anthropologist Ulf Hannerz (2004, p. 226), who compared journalists and anthropologists as “neighboring groups engaged in a somehow parallel pursuit,” this article explores what researchers may learn from practitioners who conduct research without being on-site. Fed by various practical journalists’ experiences, the article aims to investigate how information and communication technologies (ICTs) and digitally mediated methods, such as online search tools and social media, can be used to establish contacts and gain trust remotely. Here, the relevance of these methods for accessing a field in general goes beyond the limitations imposed during the COVID-19 pandemic and can be of interest to all those who face difficulties of field access of any kind. Ultimately, this article reflects on corresponding ethical challenges that may arise while conducting research remotely.

Keywords: Comparing journalists’ and ethnographic researchers’ practice, practical experiences, travel restrictions, field access, building trust, ICT, digital methods, ethical challenges, research in sensitive contexts

Author information:

Laura Gianna Guntrum (she/her) is a German research associate and forms part of the research group of Science and Technology for Peace and Security (PEASEC) at the Department of Computer Science with secondary appointment in the Department of History and Social Science at the Technical University of Darmstadt since January, 2021. Her research interests include the use of ICT during political crisis and intersectional approaches within peace and conflict studies.

Email: guntrum@peasec.tu-darmstadt.de

Mira Keßler is a PhD student at the Graduate School MEDAS21 – Media Development Assistance in the 21st century – funded by Volkswagen-Foundation. Her research examines how individuals in journalism training connect with one another in light of their differences. While conducting her research in Europe, India, and Nepal, Mira seeks to contribute to solving problems of practical relevance. Her research interests include journalism training, teaching, (cross-cultural) communication, postcolonialism, de-westernisation, and qualitative methods. She holds an M.A. in Media Studies from Eberhard-Karls-University Tübingen. Mira also worked as a filmmaker, media educator, and journalist. For more information about the author, please follow this link: <https://www.medas21.net/fellows/>

Email: Mira.Kessler@rub.de

Jignesh Patel is a fact-checker and Media & Information Literacy trainer. After completing his Master in Mass Communication and Journalism (MMCJ) from Gujarat University, he has been fact-checking claims emanating from social as well as mainstream media for close to three years now. He has a knack for visual investigation with a major interest in fact-checking videos and images. He worked for India's leading fact checking organisation Alt News and was responsible for setting up Alt News' education initiative. In October 2021 he has started his second master of Global Communication: Politics and Society at the University of Erfurt.

Email: jignesh.infosense@gmail.com

Anna Varfolomeeva is a Postdoctoral Researcher at Helsinki Institute of Sustainability Science and Faculty of Arts, University of Helsinki. Her postdoctoral project focuses on indigenous conceptualizations of sustainability in industrialized areas of Russia. Anna received her PhD (2019) at Central European University in Budapest and previously worked at the School of Advanced Studies, University of Tyumen in Siberia. She is the co-editor of Multispecies Households in the Saian Mountains: Ecology at the Russia-Mongolia Border (2019). ORCID: 0000-0002-7421-6766

Email: anna.varfolomeeva@helsinki.fi

To cite this article: Guntrum, Laura Gianna, Keßler, Mira, Patel, Jignesh, & Varfolomeeva, Anna (2022). Remotely Accessing the Field and Building Trust with Distant Sources. Perspectives from Journalism Practice for Ethnographic Research. *Global Media Journal – German Edition*, 12(1), DOI: <https://doi.org/10.22032/dbt.53026>

Disrupted Ethnography: Challenges of Doing Field Research

Since 2020, the ongoing COVID-19 pandemic and related difficulties in travel for fieldwork have made empirical research for ethnographers¹ more difficult. The control measures, such as lockdowns, travel restrictions, and social distancing, have imposed significant limitations on field access, both for researchers and practitioners (Arya & Henn, 2021). A number of academic articles discuss specific challenges of online ethnography, such as reduced willingness of research participants to contribute to digital projects (Favilla & Pita, 2020), increased vulnerability of both researchers and participants (Fine & Abramson, 2020), and the need to think beyond the established methodologies (Kumar, 2020). Additionally, different webinars, networks, workshops and calls for proposals by ministries and other funding agencies have emerged, addressing current challenges for ethnographic research in particular². Since ethnographers often explore (cultural) phenomena outside their own environment, their work requires them to be on site and meet people in person; and thus, to travel. Therefore, it seems essential to reimagine the field in these challenging times of the COVID-19 pandemic and social-distancing (Kumar, 2020). However, closed borders caused by conflicts, travel bans, and other blockades have always existed, hindering access to the field even before COVID-related restrictions. Since at certain times it is difficult or impossible to conduct research in person, digital and other remote tools can facilitate making contacts. Therefore, this article will explore possibilities of how to get access to a field remotely and how to build trusting relationships in situations where in-person communication is hindered or even impossible.

Overall, the article follows the principle of “thinking out of the box”, as the authors consider it as rewarding for ethnographic researchers³ to engage in a dialogue with journalists and learn from their practice, because they have comparable ways of participating in the field. Both travel to other contexts, get involved in new life settings, look for research informants or collaborators with the necessity of gaining access to their field, and conduct interviews where building trust plays an important role.

¹ Ethnography can be understood as “the study of beliefs, social interactions, and behaviors of small societies, involving participation and observation over a period of time” (Naidoo, 2012, p. 1).

² To give some examples: (1) Ethical Dilemmas in Anthropological Research & Debate-Roundtable World Council of Anthropological Associations (WCAA), <https://www.waunet.org/wcaa/video-categories/webinars/>, 02.04.2022. (2) The Magdeburg Online Forum “Qualitative Educational and Social Research in Times of COVID-19”,

http://www.zsm.ovgu.de/Arbeitsformate/Austauschforen/Online_Forum+_Qualitative+Bildungs_+und+Sozialforschung+in+Zeiten+von+COVID_19_-p-406.html, 02.04.2022. (3) The newly opened online forum by the German Sociological Association to discuss data collection challenges and solutions in these times when personal contacts are restricted.

<http://blog.soziologie.de/community/corona-und-der-stillstand-der-sozialwissenschaftlichen-forschung/>, 02.04.2022. (4) The Autumn School “Disrupted Ethnography” held in October 2021 at Ruhr University Bochum. <https://disrupted-ethnography.org/>, 31.03.2022.

³ By writing “ethnographic researchers” in this article, we address anthropologists and all qualitative researchers from different disciplines, who are following an ethnographic approach and dealing with questions of field work (Madden, 2010).

Here, we – as academics – want to learn from this practice to look beyond the edges of our academic publications. Furthermore, we would like to reflect on corresponding ethical questions of remote access, privacy concerns, and the representation of others. We will discuss these topics not only through the two lenses of practitioner and researcher, but also with an interdisciplinary lens that combines ethnography, journalism, and peace and conflict studies. An interdisciplinary exchange is extremely valuable, since different disciplines possess varying expertise and competencies which can mutually complement one another. Furthermore, an interdisciplinary team facilitates a joint critical reflection on e.g. methodological approaches. Overall, experience has shown that interdisciplinary exchange is important to address ethical issues together (Grimm et al., 2020).

For the purpose of this article, interdisciplinary exchange between practice and research can be noted between one of the authors (Patel), who is a practicing journalist and fact-checker, and the three other authors (Guntrum, Keßler & Varfolomeeva), who are PhD and postdoctoral researchers working with ethnographic methods. It is important to emphasize that this contribution can only reflect very context-specific assessments and that similar circumstances may be perceived differently in other contexts. Also, due to personal attributes, such as origin, education, and gender, perceptions can differ greatly. Overall, our selected examples are intended to stimulate reflection on the transferability of practical knowledge and the proposed methods for ethnographic researchers.

In this paper, we make the following contributions: First, the article introduces the concept of comparing work practices of journalists and ethnographic researchers and the possibilities for academia to learn from practice. Then, we will elaborate the concept of alternative ways of assessing the field remotely. Through some practical examples, we will reflect on skills – such as the usage of information and communication technologies (ICTs), social media, and online search tools – that can help to get field access remotely and to identify and contact research participants and also in building trust with them. Subsequently, some ethical considerations with regard to field access and building trust are presented. Finally, we will conclude in which way ethnographic researchers could learn from practice and how they could extend their repertoire of research tools.

Studying Sideways – Comparing Journalists’ and Ethnographers’ Work Practices

For many researchers, applying theoretically learned concepts to the real world poses a challenge, as circumstances change expeditiously, and research needs to be very context-specific. Each empirical study presents different challenges that vary from establishing contact, to trust-building processes, to ethical and security concerns (Shefner & McKeeney, 2018). Practitioners, who do not primarily rely on theoretical approaches but instead mainly deal with practical challenges on a day-to-day

basis, could provide stimulating application-oriented examples that may help ethnographers in the future.

By learning from practitioners such as journalists, ethnographic researchers could potentially expand their research repertoire and tools. This practice-focused approach is different in so far, as the discussion on exchange usually focuses solely on scientists and how they can share their gained knowledge beyond their ivory tower and make it useful for practitioners (Hannerz, 1998, p. 111). Going beyond that approach, the social anthropologist Ulf Hannerz discussed instead the idea of comparing the practice of journalists and ethnographic researchers – including anthropologists. According to Hannerz (2004), journalists and ethnographic researchers are “neighboring groups engaged in a somehow parallel pursuit” (p. 226). The comparison of these two neighboring groups is described by Hannerz (1998) as “studying sideways”⁴ (p. 109). It can be used to “sharpen our sense of our own practices, and our own moral and intellectual assumptions” (p. 111) and to learn from each other.

Focusing on field work, journalists, and ethnographic researchers both have to get access and have to build close and trustful relationships with their informants or research participants. For foreign journalists, the person responsible for establishing contact with interview partners and sources⁵ on their behalf is usually referred to as the local “fixer”. For ethnographic researchers, such a person might be their field assistant or a research participant (Hannerz, 2003, p. 205f.), also referred to as a “gatekeeper”. From this article's perspective, field access and relationships with distant persons can be built remotely. Corresponding methods which work, for example, with ICTs and the internet are important to consider, as both journalists and researchers have had to become “digital media practitioners” in times of digitization (Boyer, 2010, p. 74).

In the following, we discuss this particular expertise through the perspective of investigative journalism – more precisely fact-checking – in India. Here, journalists have used communication platforms and ICTs to establish first contact with potential sources even prior to the COVID-19 pandemic. As a journalist of a non-profit fact-checking organization with considerably limited financial resources, Jignesh Patel has repeatedly faced the challenge of ascertaining and reporting facts from the ground remotely by finding sources and collaborators⁶. The following chapter will provide a basic introduction to fact-checking and cite relevant anecdotes of the use of different tools to remotely access a field and build trust.

⁴ Here, he refers to Laura Nader's essay (1972) that discusses how anthropologists mostly conduct research with people, who are less powerful than the researchers themselves and therefore “study down” (Hannerz 1998, p. 109).

⁵ In the context of this article, the term source refers to a person, entity, organization, through whom information is directly or indirectly acquired.

⁶ Besides India, he also fact-checked in other countries including Israel, United Kingdom, Bangladesh, and Nepal. However, the article will primarily focus on examples from India.

Perspectives from Journalism Practice: Experiences from Fact-Checking

Generally, fact-checking has two meanings in the field of journalism. While the traditional meaning “relates to internal procedures for verifying facts prior to publication”, the newer meaning denotes stories that “publicly evaluate the truth of statements from politicians, journalists, or other public figures” after they got published (Graves & Amazeen, 2019). The traditional meaning refers to the fact that it has always been an integral part of journalism within, e.g., magazines such as “The New Yorker” and “Time”, which have had a system of fact-checking in place at least since the 1930s (Yagoda, 2001, p. 202). The newer meaning, however, is derived from a narrowed focus on the process of assessing the validity of claims that have entered “the public domain through some form of media” (Edwardsson et al., 2021, p. 1). However, it is important to note here that such defined meanings attempt to generalize a very complex, evolving, and diversified field. According to Patel’s practice, the process of fact-checking is verifying a claim based on a text, video, and audio, amongst others, and validating the authenticity of the same. Moreover, the process generally involves gathering, vetting, and validating information from various sources like news media organizations, social media platforms, and online/offline communities.

As there are many different methods that can be imposed for digital and remote research, this article will focus on some of the most important methods used in fact-checking and corresponding challenges. Furthermore, practical suggestions will be presented on how these methods could be used by ethnographic researchers – following the initially stated idea about learning from this particular practice⁷.

Remotely Accessing the Field

How to Identify Sources

Around the world, fact-checkers, largely working with new, small, and independent media organizations, often lack the resources to travel to the location and report from the ground. In contrast, traditional journalists often work with corporate media organization and are located in a region or have some resources for travel. Hence, fact-checkers often conduct research online and use other ICTs, such as a phone and messenger services, like *WhatsApp*, *Signal*, etc., and the internet. This

⁷ Some examples of similar challenges faced by researchers and how they could apply digital tools used in fact-checking to address them have been inspired by conversations at the autumn school “Disrupted Ethnography” and the exchange with PhD-students from the Graduate School on media development MEDAS21.

See, Autumn School *Disrupted Ethnography*: Patel, J. (2021), <https://disrupted-ethnography.org/> (03.04.2022)

See also, Exchange with PhD-students on digital tools: Patel, J. (2020b). “When traveling and field research are not possible - Guest speaker Jignesh Patel from “Alt News India” on creative research methods. Retrieved from <https://www.medas21.net/news/news-archive/>.

section focuses on the methods that could be applicable for identifying sources or collaborators remotely.

To discover probable and relevant sources within a specific region, journalists as well as fact-checkers utilize multiple online methods, e.g., *advanced Twitter* search, and refined *Google* search. A combination of such methods is very helpful to identify and follow online communities across platforms.

Twitter search is a search engine that allows any person with a *Twitter* account to search for tweets and profiles with relevant keywords and search filters. This can be used to find a community or an individual from a region or area that is interested in a specific subject or issue and is active on the social media platform. *Google* search enables the user to perform a specific search based on a rough description of whom and where they wish to identify (as) a source.

For instance, a journalist wishes to find Indian science journalists to get their opinion on science news coverage in the backdrop of a pandemic. After finding the names of the journalists that someone is interested in contacting via *Google*, they can perform a search on social media platforms, like *Twitter*, to find their public profiles, and thus a communication channel to contact them. It is important to add that the use of advanced search on search engines and social media platforms requires a basic knowledge of search operators that helps filter and narrow search results according to one's requirement (for more information about *Google* search operators, see Hardwick, 2020).

Similarly, ethnographic researchers can utilize these methods to identify potential study participants, research assistants or gatekeepers and network with them particularly via social media and instant messengers which are popular within a geographical region or for their sources. While some messaging apps and social media platforms are popular globally, there are several countries where alternative apps and platforms are used predominantly, like *WeChat* or *Weibo* in China, *Telegram* in Iran and *Line* in Japan (Wardle, 2020). Another aspect is that search functions within such apps and platforms can be very different and in some cases a search might not even be possible, for example, when they are not accessible from outside the respective countries.

Using *Google Maps*, ethnographic researchers can also identify contacts in remote areas which they want to explore and find possible gatekeepers or research participants. Of course, it is important to note here that it is only possible to find what is already mapped online. However, in order to overcome this challenge of accessing remote and unmapped regions, researchers can find the nearest possible contacts in a broad region and then request these contacts to help them identify potential study participants.

After having provided examples on how to identify sources remotely, the next section will discuss methods on how to contact identified sources remotely.

How to Contact Sources

It is necessary to make a broad distinction between two types of sources – sources with online presence and sources without online presence.

To provide an example of a source with online presence, this article will refer to a case where Patel contacted a person with a social media profile. While fact-checking an image from the Indian-administered part of Kashmir, Patel had to contact the photographer of the image, to verify the context and its origin (for more details see Patel, 2018). Upon identifying the potential photographer, a search for their social media profile – *Instagram* and *Twitter* – was conducted and a direct message was sent to the photographer via *Twitter*. The message briefly explained the professional background of the fact-checker, along with a precise reason for reaching out. Later, after getting his contact Patel spoke to the photographer on the phone to obtain more details on the context and confirm it. Likewise, journalists recommend that it is best to change the communication space to enable longer and deeper conversations, e.g., to make a phone call via preferred and secure apps or to communicate via email (Tenore, 2012).

Similarly, researchers can find potential research participants' social media profiles and reach out to them via the direct message function with a precise message, explaining the reason for reaching out. Later, if possible a phone call can be made to enable a more personal conversation.

As not all the potential sources maintain an online presence, it is essential to discuss ideas for contacting sources offline. In challenging cases characterized by, e.g. inaccessibility in a specific geographical region, Patel has always reached out to verified sources, who could provide further contact information for people who may not have an online presence⁸. Particularly during times of turmoil and unrest, flexibility in methods employed to identify and contact sources poses one of the main challenges.

For example, in February 2020, Patel was trying to identify victims seen in a viral video of police brutality during the Anti-Muslim Delhi riots (for more details see Patel, 2020a). The incident in the video took place at an unidentified location within India's capital New-Delhi. With a basic *Twitter* search, the fact-checkers found out that an account operated by a group of activists could have posted the video first on the platform. Patel started reaching out to the very same activists via the instant messenger *WhatsApp*. With their support, he was personally able to identify the victim for verification purposes and speak to them and the victim's family. Thus, the video was conclusively verified.

⁸ These verified sources could be non-profit workers, researchers, lawyers, journalists, police personnel, and other practitioners with whom the researchers' research interests align.

Similar to journalists, ethnographic researchers can also cultivate sources within their geographical region or area of interest. Going beyond the initial contacts with an online presence and belonging to a certain social and political group, researchers can also get access to the field where internet connections are not stable or have not been developed yet. This could also help researchers to ensure that their study is not only limited to participants with an internet connection and that their research thus does not represent a social and geographical bias.

Both for identifying and contacting sources, further challenges exist. In the following, two additional notes that highlight some of the challenges that journalists and researchers might face while identifying and contacting sources remotely will be presented.

Additional Note 1: Linguistic Challenges in Getting In Touch with Sources

One challenge is how to contact sources remotely from several linguistically-different regions. To tackle the challenge of being unable to communicate due to a language barrier, fact-checkers usually contact colleagues, friends or good contacts, who could communicate in the respective specific language (for examples see Patel, 2019a & 2019c). In this context, “good contacts” refers to people with whom a journalist has established communication and trust (remotely or otherwise) and who are possibly from a specific region, where they speak the language in question. However, in Patel’s practice, there have been instances when it was impossible to find a person among trusted connections who could communicate on his behalf. In such cases, he utilized online research tools, such as *Google* and *Twitter*, to find local journalists, activists, or public figures, who were based in the region of interest or outside, and who spoke Patel’s language and the language required to study the particular fact-checking case. Moreover, for the purpose of cross-checking, the calls and conversations with sources carried out by contacts were recorded with their permission.

Similarly, researchers can attempt to overcome the language barriers by finding a person or a research assistant, who speaks the local language and their own language(s). It could be a student recommended by a professor or a journalist from a specific region who can mediate remote communication between the researcher and the research participant. It is important to reflect, that this could create a potential bias and might influence interview dynamics.

Additional Note 2: The Importance of Collaboration

Collaborations play an important role in accessing the field remotely. According to Patel’s practice, collaborations, which are more of an eye-level partnership and are mutually beneficial, can provide a perspective of the socio-political, economic, and cultural context of the field. As an example of the importance of collaborations, we can refer to Patel’s usage of the collaboration strategy utilized during the verification exercise of a video in February 2020. The video was extensively amplified by the

supporters and members of the Indian ruling party to question the legitimacy of anti-CAA⁹ women protesters. The video showed a young man conversing with at least two people in a shop in Delhi. The young man in the video claimed that protesting women had been paid to protest against the ruling Hindu-nationalist BJP (*Bharatiya Janata Party*). After a preliminary investigation, the fact-checkers identified the exact location where the video was shot (a telephone number of the shop was visible in one frame of the video) and by an online research (conducting a *Google* search to establish a link between the telephone number and a shop located in Delhi). With this information, an online and offline search was conducted to identify a journalist based in Delhi, with whom a collaboration could be established to pursue the fact-checking story in the field. Upon reaching a consensus on the approach for the investigation, the Delhi-based journalist physically went to the shop in Delhi and spoke to the person operating the shop. It was revealed that the shopkeeper had visible links with India's ruling BJP that passed the CAA bill in the parliament and he also severely criticized the protesters. Moreover, the shop-operator himself deemed the allegations made in the video to be of questionable veracity. Upon speaking to the local BJP worker, who lived close to the shop, the journalist was able to corroborate his finding that supporters of the ruling party had been involved in the creation and amplification of the video which made serious allegations without any factual basis or evidence (for more information see Patel & Tiwari, 2020).

Collaboration could also be relevant for researchers. We may imagine a scenario where a researcher, who collaborates with activists, requires data from the ground. The activists could make phone calls from the field or record the events of interest, while ensuring applied methods do not endanger them. In a situation in which it is not possible for a researcher to be physically present in a given location, there are options to use social media or other digital tools to contact those residing in the region in question and ask them for assistance. As the nature of ethnographic work stresses the importance of long-term connections, it is important to keep the local collaborators fully informed about the purpose and procedures of the study and to engage in equal and respectful relations with them.

In contrast to the process of reaching out to sources, which is more of a research and networking skill, the process of gaining and building trust with sources is a soft skill that can be learned through practice, and will be discussed in the next chapter.

⁹ CAA refers to the "Citizenship Amendment Act" that was passed in the Indian parliament on December 11, 2019. The CAA had led to outbursts of protest across the country. The protesters deemed the law to be exclusionary to Muslims and violating the secular principles enshrined in the Indian constitution.

After getting access: Building Trust with Distant Sources

Overall, trust plays a significant role as the spirit of personal interaction needs to be conveyed remotely. One aspect for creating an atmosphere of trust in distant communication is to utilize common references such as shared contacts, identities, association or past events. Thereby, one can refer to the people, whom they and the source know and trust, or to an event or incident that happened in the past that could be of interest to both. This facilitates building a sense of familiarity with the source. Journalists and researchers alike need to also be prepared to share some information about themselves, such as interesting aspects of past work history, basic professional and individual background – without overburdening the other side with details. On several occasions when Patel contacted potential collaborators, he was asked to visit them in-person before they shared any information with him. However, due to financial and time constraints, it was not feasible to travel to all locations across India. Hence, Patel tried reaching out to several people remotely over the phone, one after another, attempting to develop one remote acquaintance. In such conversations, he conveyed his credentials by providing information about his work profile and previous work. He also remained transparent about the scope of his work, its aims and stages, and provided additional information if needed.

Once Patel had gained the trust of a primary contact or gatekeeper, he would usually seek their help to get access to other people working within an organization or an interest group. For example, while researching for an article on a viral video about the infamous child-kidnapping rumor (for more details on this example see Patel, 2019b), Patel reached out to several police officers working in the central Indian state of Madhya Pradesh. Patel was able to gain one of the officer's trust, who was also interested and committed to debunking the rumor. He could ask for his help in tracking down the location of a specific video so that it could be verified. The police officer also provided the contact information to other police officers stationed in various parts of the district. Later, by referencing his previous contact with that police officer, Patel was able to build trust among other policemen of that region despite never having met them in person.

Applying this idea, researchers can also build contacts within an organization and interest groups remotely, by investing time to build a trusted relationship that could help to find other contacts. Speaking to someone on the phone can lead to more fruitful results, than writing emails or sending text messages. Also shared interest in the same topic could support collaborations.

Another aspect of the communication process of gaining trust is treating one's sources with respect and dignity¹⁰. For instance, in several fact-checking stories,

¹⁰ In this regard too, we could discuss the example of the US journalist Andy Carvin who reached out to his sources more like colleagues instead of just as sources, who were supposed to do things at his command (about Carvin's methods see Ingram, 2013). “[J]ournalists and others who simply hand out orders get very little in response, but treating people like human beings makes all the difference”,

when Patel received help from people in the field, he always discussed the story with them and what was required for the fact-checking process. Moreover, in few of the cases, after having received information from sources whose security or life may be at risk after subsequent publication, Patel's organization chose to protect their identities by not disclosing them. While researchers may be even more sensitive to protecting the identities of their research participants, the aspect of assessing participants' security risk according to the sensitivity of the issue and region could be of relevance to all parties involved. Here, remote access to the field comes with its own ethical challenges.

Ethical Challenges of Accessing the Field Remotely: Importance of Privacy and Data Security

Besides numerous possible benefits, such as cost-effectiveness and easier access to one's research participants, several ethical challenges need to be taken in consideration when accessing one's field remotely. One ethical challenge, commonly encountered by both journalists and ethnographers, relates to the ways in which their knowledge and actions can harm potential study participants (Hannerz, 1998, p. 111). Particularly in times of digitalization, new risks such as digital surveillance arise that require ethical considerations in order to avoid or reduce potential harm. Special attention should be paid in case of sensitive issues, since even if no risks are evident at the time of initial contact, the situation may change rapidly. In such cases, personal collected data deemed non-critical at a particular point in time can lead to problems in the event of a political takeover or a regime change. This could be acutely observed in 2021 after the Taliban seized power in Afghanistan. Personal (biometric) information, such as profession and fingerprints, were collected by international actors (such as the US military) before the takeover and perceived as not critical. However, with the Taliban taking over control, this information became dangerous and perhaps even lethal as people working for international organizations were ostracized and partially persecuted by the Taliban (Jakubowska, 2021). Before accessing the field and establishing initial contact to potential interlocutors, it is important to reflect upon the context of the study, aiming to identify potential risks, in the analogue as well the digital realm. Although guidance for analyzing risks and threat models exist, it is difficult to assess numerous risks (such as digital surveillance) in advance because certain aspects are unknown at the time the study is conducted (Wood, 2006; Grimm et al., 2020; Miljanovic & Wissenbach, 2020). Risk analyses from peace and conflict research and threat analyses from IT security complement one another by each considering analog as well as digital potential threats (e.g., spyware).

Another challenge strongly linked to remote journalism and ethnography is data security. In particular, privacy and data protection aspects shall be considered,

ensuring self-agency and reducing often existing power asymmetries between respondents and interviewees (p. 74).

whenever personal data are collected, as they can be potentially misused by other actors (Miljanovic & Wissenbach, 2020). Digital surveillance and data abuse are no longer exceptional cases and can be observed in large parts of the world, as examples from India, Hongkong, and Myanmar illustrate, where, among others, anti-government activists are monitored by the government or military (Mahapatra, 2021; Potkin & Mcpherson, 2021; Postill et al., 2020, Greater Kashmir, 2018). On this account, stakeholders conducting digital research should be aware that unsecure and unethical research may violate interlocutors' trust and potentially jeopardize their lives (Lauber-Rönsberg, 2018). The usage of more data secure apps for communication can, amongst others, help to develop an environment of trust and comfort. Overall, in times of rapid technologization, more and more people are reached via social media and instant messenger, which is why it is important to think about which tool to use (Wardle, 2020). It is also important to consider the risk and threat perceptions of research participants while opting for a specific communications platform considering the sensitivity of the information shared by the source. Different platforms are vulnerable to privacy and security concerns. So, it is not only about the preferred platform of the research participants, it is also about finding the appropriate platform which is more secure for the exchange to protect them from potential consequences. There are platforms that cannot be traced back which is important for example when research is critical to governments. Some of the relatively well-known tools used by journalists to securely communicate with their sources include the open-source whistleblower submission system SecureDrop, the open-source messaging app "Signal", and "Pretty Good Privacy" (PGP) encrypted emails (Forbidden Stories, 2017). Nowadays, in very sensitive cases, it is recommended to use data-secure telecommunication applications such as "Jitsi-meet", which is GDPR-compliant (General Data Protection Regulation). Generally, it is advisable to carry out an individual threat analysis in order to assess which digital risks exist and which communication tool is best suited in each case study (Jeong, 2008; Miljanovic & Wissenbach, 2020).

Another ethical issue is that remote ethnography using online tools or social media can represent a "disguised observation," i.e., the research participants do not necessarily know that they are being observed at a given moment (Gatson, 2013). Additionally, the methods of digital ethnography have been critically assessed for their limitations, such as lack of sensory experiences for the researcher (Gatson, 2013). The paralinguistic features of in-person interaction, such as body language, gestures, facial expressions, and voice tone, are largely lost when communicating remotely, thus creating a feeling of anonymity and building symbolic distance (Tagg et al., 2017). However, while constraining our habitual methods of communication, digital interaction may offer new ways of establishing contacts and express new kinds of meanings: technologies enable instant communication overcoming large distances, and thus may facilitate the feeling of closeness (Jones & Hafner, 2012). Other benefits are contextual richness and the opportunities to analyze larger samples (Murphy, 2020).

Another challenge is the question of representation. For example, elderly research participants who are often seen as especially resourceful community members willing to share their experience (Busija et al., 2018; Varfolomeeva, 2016), are often difficult to reach through online methods. Limiting the participation of these community members and other offline groups could potentially result in a loss of traditional knowledge of local communities. The strategy here could be to reach these offline participants through shared contacts, such as local activists, or through their relatives who may be more active online and who could potentially assist in digital interviewing.

In summary, digital methods of field access can be profitable. However, it is necessary to reflect on their application with regard to their appropriateness and possible risks, and also to keep them transparent for those involved in the research. In the following chapter we want to summarize what we have learned from our exchange between journalists' and ethnographers' research practices.

How Different Methods can be Used to Get Access Remotely and to Build Trust

Some of the presented methods may be utilized to get in touch with local activists, potential gatekeepers, and research participants. This may be particularly promising in situations when researchers can't access the field in person or when they have not worked in this specific field before. It is also possible to make use of local groups in the social networks that are widespread in a specific region or to attend online or hybrid events such as conferences or community gatherings held there. The strategies of building trust in distant communication, employed by fact-checking journalists, could similarly be of use for ethnographic researchers. When contacting research participants online, it is crucial to remain open about one's background and research aims, providing additional information whenever necessary. It is possible to rely on shared contacts or memories in the situations when the anonymity and safety of one's research participants are not compromised.

As illustrated, the perspectives of fact-checking in journalism could potentially enrich the ways of ethnographic field research at the time when direct field access is problematic or not possible at all. At the same time, it is crucial to reflect about the usage of the methods employed in journalism and fact-checking and their applicability for ethnography. Fact-checking techniques, as their name suggests, aim at gathering or verifying the necessary data. Whereas long-term bonds with local residents are often formed during information exchange, they are not always necessary, as in some cases the journalist's presence in the field is limited. As this article notes, the goal for a researcher may not be to gather specific information or to check the validity of the data, but to attune to a diversity of voices, perspectives, and opinions in the field and to form long-lasting connections for further research projects. Thus, approaching research participants remotely and asking them for information

without in-depth engagement in the field could hinder ethnographers from gaining in-depth insights and prevent them from establishing meaningful connections. Furthermore, it is important to keep in mind the diversity of regional contexts and the existing digital inequalities. For example, when working with remote communities, e.g., indigenous residents, it may be especially difficult to (only) rely on digital methods.

As we have reflected, interdisciplinary exchange between practitioners and scientists seems essential in order to understand a phenomenon in a holistic way. Exchange between scientists and practitioners allows best practice examples and different methodological approaches to be reflected upon and potentially be adopted. They could cooperate to exchange research methods and findings in shared conferences that also provide room for critical discussion. Furthermore, method handbooks with practical hands-on-examples could be more accepted within research communities, as reports from the field are often closer to reality and specific challenges. It remains to be said, however, that due to different factors, such as ethnicity, culture, language, and political circumstances, contexts differ and should thus be analyzed individually in each case study, evaluating which approach seems suitable.

References

- Arya, D., & Henn, M. (2021). COVID-ized Ethnography: Challenges and Opportunities for Young Environmental Activists and Researchers. *Societies*, 11(2), 58. <https://doi.org/10.3390/soc11020058>
- Boyer, D. (2010). Digital Expertise in Online Journalism (And Anthropology). *Anthropological Quarterly*, 83(1), 73–95.
- Busija, L., Cinelli, R., Toombs, M., Easton, C., Hampton, R., & Holdsworth, K. et al. (2018). The Role of Elders in the Wellbeing of a Contemporary Australian Indigenous Community. *The Gerontologist*, 60(3), 513–524.
- Edwardsson, M. P., Al-Saqaf, W., & Nygren, G. (2021). Verification of Digital Sources in Swedish Newsrooms — A Technical Issue or a Question of Newsroom Culture? *Journalism Practice*. <https://doi.org/10.1080/17512786.2021.2004200>
- Favilla, K. & Pita, T. (2020). “When will fieldwork open up again?” Beginning a project in pandemic times. *Fennia*, 198(1–2), 230–233. <https://doi.org/10.11143/fennia.99203>
- Fine, G. A., & Abramson, C. M. (2020). Ethnography in the time of Covid-19. Vectors and the vulnerable. *Etnografia e ricerca qualitativa*, 13(2), 165–174.
- Forbidden Stories. (2017). *Protect Your Stories*. <https://forbiddenstories.org/protect-your-stories/>, 02.04.2022.
- Gatson, Sarah N. (2013). The Methods, Politics, and Ethics of Representation in Online Ethnography. In N. Denzin, & Y. Lincoln (eds.), *Collecting and Interpreting Qualitative Materials* (pp. 245–275). Sage.

- Graves, L., & Amazeen, M. A. (2019). Fact-checking as ideology and practice in journalism. In *Oxford research encyclopedia of communication*.
<https://oxfordre.com/communication/view/10.1093/acrefore/9780190228613.001.0001/acrefore-9780190228613-e-808>
- Greater Kashmir (2018). Example of digital surveillance from India. <https://www.greaterkashmir.com/kashmir/paytm-provided-personal-data-of-kashmiris-to-a-political-party-on-pmo-request>, 04.04.2022.
- Grimm, J., Koehler, K., Lust, E. M., Saliba, I., & Schierenbeck, I. (2020). Thinking Systematically about Digital Security. In J. Grimm, K. Koehler, E. M. Lust, I. Saliba, I. Schierenbeck (eds.), *Safer Field Research in the Social Sciences: A Guide to Human and Digital Security in Hostile Environments* (pp. 90–106). Sage.
- Hannerz, U. (1998). Other Transnationals: Perspectives Gained from Studying Sideways. *Paideuma*, 44, 109–123.
- Hannerz, U. (2003). Being There . . . and There . . . and There! Reflections on Multi-site Ethnography. *Ethnography* 4(2), 201–216.
- Hannerz, U. (2004). *Foreign News. Exploring the World of Foreign Correspondents*. The University of Chicago Press.
- Hardwick, J. (2020, August 3). Google Search Operators: The Complete List (42 Advanced Operators). *Ahrefs blog*. <https://ahrefs.com/blog/google-advanced-search-operators/>
- Ingram, M. (2013). Putting the Human Crowd to Work. In C. Silverman (ed.), *Verification Handbook: An Ultimate Guideline on Digital Age Sourcing For Emergency Coverage* (pp. 70–75). European Journalism Centre.
- Jakubowska, E. (2021, November 17). Do no harm? How the case of Afghanistan sheds light on the dark practice of biometric intervention. *European Digital Rights*. <https://edri.org/our-work/do-no-harm-how-the-case-of-afghanistan-sheds-light-on-the-dark-practice-of-biometric-intervention/>
- Jeong, H. W. (2008). *Understanding Conflict and Conflict Analysis*. Sage.
- Jones, R., Hafner, C (2012). *Understanding Digital Literacies: A Practical Introduction*. Routledge.
- Kumar, H. (2020, May 22). Ethnographic Disruption in the Time of COVID-19. *Anthropology News*. <https://www.anthropology-news.org/articles/ethnographic-disruption-in-the-time-of-covid-19>
- Lauber-Rönsberg, A. (2018). Data Protection Laws, Research Ethics and Social Sciences. In F. M. Dobrick, J. Fischer, & L. M. Hagen (eds.), *Research Ethics in the Digital Age* (pp. 29–45). Springer VS.
- Madden, R. (2010). *Being Ethnographic. A Guide to the Theory and Practice of Ethnography*. Sage.
- Mahapatra, S. (2021). Digital Surveillance and the Threat to Civil Liberties in India. *German Institute for Global and Area Studies* (GIGA). No.3.
<https://www.ssoar.info/ssoar/handle/document/73130>
- Miljanovic, M., & Wissenbach, K. R. (2020). Thinking Systematically about Digital Security. In J. Grimm, K. Koehler, E. M. Lust, I. Saliba, & I. Schierenbeck (eds.), *Safer Field Research in the Social Sciences: A Guide to Human and Digital Security in Hostile Environments* (pp. 90–106). Sage.
- Murphy, E. (2020). Key Benefits of Mobile Ethnography – Online Qualitative Research. *Indeemo*. <https://indeemo.com/blog/mobile-ethnography-benefits>
- Nader, L. (1972). Up the Anthropologist – Perspectives Gained from Studying Up. In D. Hymes (ed.), *Reinventing Anthropology* (pp. 284–311). Pantheon.
- Naidoo, L. (2012). Ethnography: An Introduction to Definition and Method. In L. Naidoo (ed.) *An Ethnography of Global Landscapes and Corridors* (pp. 1–9). InTech.

- Patel, J. (2018, October 24). No, this Indian army personnel is not stealing shoes from Kashmiri youth. *Alt News*.
<https://www.altnews.in/no-this-indian-army-personnel-is-not-stealing-shoes-from-kashmiri-youth/>
- Patel, J. (2019a, August 19). School skit promoting India-Bangladesh brotherhood shared with hate-filled narrative. *Alt News*.
<https://www.altnews.in/school-skit-promoting-india-bangladesh-brotherhood-shared-with-hate-filled-narrative/>
- Patel, J. (2019b, July 25). Video of mentally-challenged man falsely accused of child-kidnapping viral on social media. *Alt News*. <https://www.altnews.in/video-of-mentally-challenged-man-falsely-accused-of-child-kidnapping-viral-on-social-media/>
- Patel, J. (2019c, August 28). Drunk man falsely accused of child-lifting by a woman in Punjab. *Alt News*.
<https://www.altnews.in/drunk-man-falsely-accused-of-child-lifting-by-a-woman-in-punjab/>
- Patel, J. (2020a, February 25). Video verification: Delhi cops beating injured men, forcing them to sing national anthem. *Alt News*.
<https://www.altnews.in/video-verification-delhi-cops-beating-injured-men-forcing-them-to-sing-national-anthem/>
- Patel, J. (2020b, June 24). When traveling and field research are not possible – Guest speaker Jignesh Patel from “Alt News India” on creative research methods. *Medas 21*.
<https://www.medas21.net/news/news-archive/>
- Patel, J. (2021). *Remotely accessing the field and building trust with distant sources* [Workshop Presentation] Disrupted Ethnography Autumn School, October 21–22 2021, RUB Research School, Bochum, North Rhine-Westphalia, Germany. <https://disrupted-ethnography.org/>
- Patel, J. & Tiwari, A. (2020, February 4). Truth about “sting” claiming Shaheen Bagh women were paid Rs 500: Alt News-NewsLaundry joint investigation. *Alt News & NewsLaundry*.
<https://www.altnews.in/truth-about-sting-claiming-shaheen-bagh-women-were-paid-rs-500-alt-news-newslaundry-joint-investigation/>
- Potkin, F., & McPherson, P. (2021, May 19). How Myanmar’s military moved in on the telecoms sector to spy on citizens. *Reuters*.
<https://www.reuters.com/world/asia-pacific/how-myanmars-military-moved-telecoms-sector-spy-citizens-2021-05-18/>
- Postill, J., Lasa, V., & Zhang, G. (2020). Monitory politics, digital surveillance and new protest movements: an analysis of Hong Kong’s Umbrella Movement. In S. Maasen, & J. H. Passoth (eds.), *Soziologie des Digitalen - Digitale Soziologie?* (pp. 453–466). Nomos.
- Shefner, J., & McKenney, Z. (2018). Confronting Political Dilemmas in Ethnographic Fieldwork: Consent, Personal Safety and Triangulation. In R. Iphofen, & M. Tolich (eds.), *SAGE Handbook of Qualitative Research Ethics* (pp. 219–230). Sage.
- Tagg, C., Lyons, A., Hu, R., & Rock, F. (2017). The ethics of digital ethnography in a team project. *Applied Linguistics Review*, 8(2–3), 271–292. <https://doi.org/10.1515/applirev-2016-1040>
- Tenore, M. (2012, July 20). How to approach sources on Twitter when covering tragedies like the Colorado shooting. *Poynter*.
<https://www.poynter.org/reporting-editing/2012/how-to-approach-sources-on-twitter-when-covering-tragedies-like-the-colorado-shooting/>
- Varfolomeeva, A. (2016). The Soul of Stone: mineral symbolism in Vepsian villages of Karelia. *Laboratorium. Russian Review of Social Research*, 8(2), 11–31.
- Wardle, C. (2020). Monitoring and Reporting Inside Closed Groups and Messaging Apps. In C. Silverman C. (ed.), *Verification Handbook for Investigative Reporting: A Guide to Online Search and Research Techniques for Using UGC and Open Source Information in Investigations* (pp. 94–97). European Journalism Centre.
- Yagoda, B. (2001). *About town : the New Yorker and the world it made*. Da Capo Press.