# Connecting Participant Observation Positions: Toward a Reflexive Framework for Studying Social Movements

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# Connecting Participant Observation Positions: Toward a Reflexive Framework for Studying Social Movements

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**Abstract**

In this article, we argue for the importance of considering participant observation roles in relation to both insider/outsider and overt/covert roles. Through combining key academic debates on participant observation, which have separately considered insider/outsider and overt/covert participant observation, we develop a reflexive framework to assist researchers in (1) locating the type of participant observation research; (2) identifying implications of participant observation for both the research and the subjects under study; and (3) reflecting on how one's role as participant observer shifts over the course of fieldwork and considering the implications of this. To illustrate these dynamics,

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we draw on two examples from our own ethnographic research experiences in direct action anticapitalist movements.

**Keywords**
participant observation, social movements, insider, ethnography, covert research

Recent protest events—from Egypt's Tahrir Square to the Occupy Wall Street movement—have spurred numerous claims about activists' motivations, their agenda, and the role of online social media in mobilizing protesters. Participant observation can help generate insights into these issues from the perspective of the activists. However, participant observation is not an impartial window into the motivations and rationales of activists and their practices. It is inevitably influenced by our relations with the research subjects and our interpretations of what we observe. Through combining key academic debates on participant observation, which have separately considered insider/outsider and overt/covert participant observation in relation to studying social movements, this article develops a "quadrant" that can be used by scholars as a heuristic tool in (1) locating the type of participant observation research; (2) identifying implications of participant observation for both the research and the movement under study; and (3) reflecting on how one's role as participant observer shifted during fieldwork and considering the implications of this.

Past scholarship has recognized tensions, challenges, and ethical dilemmas of overt versus covert research (Lauder 2003; Litcherman 2002). Covert research remains controversial. Supporters argue that it facilitates access to "closed" field sites (Fielding 1982; Jorgensen 1989:42) and reduces distortion of results (Hertwig and Ortmann 2008). Conversely, critics point to the risk of harming research subjects (Berg 2009), contaminating the participant pool, damaging research reputation, and closing off further avenues for research. Despite recognizing such ethical problems, Lauder (2003) argues that covert research, and even deception, can be justified when the research benefits outweigh the potential harm to subjects, as in the case of research on racist groups. Similarly, Li (2008) suggests that "the potential social benefits outweigh its ethical risks as the data collected can help push the boundaries of our current understanding of disadvantaged groups in society . . . [and] serve as advocacy to inform better policy and practice, ultimately bringing positive changes for people being studied" (p. 111).

Literature has also debated the merits, challenges, and ethical dilemmas of conducting insider versus outsider participant observation (e.g., Ergun and Erdemir 2010; Graeber 2009; Juris 2007; Scheper-Hughes 1995). It has often done so in terms of access, subjectivity, and political bias (e.g., Gold 1958; Litcherman 1998; Merton 1972; Plows 2008). Gaining physical and emotional access to the field and its members can prove challenging for an outsider. When researching social movements, gaining access to direct action anticapitalist activists and getting movement members to share their stories and perspectives can be difficult for an outsider because direct action activists often are constructed by hegemonic discourses as "deviant" (Becker 1967:240) and therefore face state and police repression (Hintz and Milan 2010). Barriers can be lowered if researchers share political sympathies and/or previous experience with research subjects.

Looking at subjectivity, Plows (2008) argues that insider positions inevitably entail taken-for-granted observations, whereas outsider positions enable reflections on such blind spots. But political bias (i.e., our sympathies)—whether preconceived or developed during the course of research—with our research subjects can also influence our interpretation and reporting of our findings (Becker 1967). Although the literature on overt/covert and insider/outsider participant observation is thus both well versed and nuanced, it has rarely, if ever, combined these perspectives. Given the importance of both dialogues to the use of participant observation with social movements, this article introduces a quadrant (see below) to interrogate the various positions along the two dimensions and their research implications.

The quadrant presented here places the inside/outside and overt/covert positions as types of participant observation on continua. The use of continua, we argue, avoids invoking unhelpful dichotomous distinctions that can, as past scholarship has recognized, gloss over role nuances. Our aim is not to suggest ideal–typical roles in field research or to argue that one role or position is more valid than others. Rather, through explicitly combining and mapping the two established positions of participant observation (inside/outside and overt/covert), our objective is to provide a conceptual tool for academics to critically reflect on their role and position as participant observer at various stages throughout fieldwork.

Our article is structured as follows. We begin by introducing our quadrant. On the basis of this, we discuss examples from our own ethnographic research experiences in anticapitalist movements. Specifically, examples are from research into the Dissent! Network and the 2005 Gleneagles G8 Summit, Scotland, and a study of Never Trust a COP (NTAC) at the

2009 UN Climate Conference, Denmark. In both cases, the researcher reflects on the tensions between overt/covert and inside/outside positions as they relate to subjectivity, political bias, and transitions in conducting the fieldwork. The article concludes by reflecting on how the quadrant presented can be used by scholars to bring the interrelations of the multiple dimensions of participant observer to the fore.

## *Toward a Framework of Reflexive Practice*

Although recent debates on participant observation rightly emphasize the need to explore the gray areas between extreme participant observer roles, it does not mean that we need to dismiss the categories in the early literature on participant observation outright. Instead, this article uses them as poles to interrogate two continua of positions in social movement scholarship to tease out tensions in the reflexive practice of participant observation. As a framework for this, we draw on McCurdy's (2009) suggestion for a quadrant that consists of two dimensions: inside/outside and overt/covert positions.

A polar conceptualization of overt and covert research helps establish a continuum to reflect on the use of participant observation in social movements. We draw on Merton's (1972) notion of insiders and outsiders to identify the two extremes of the insider/outsider continuum. That said, we must open up this structural characterization to include identity-related collectivities as suggested by Mercer (2007). Considering both structural and identity-related aspects of our roles as participant observers is important when researching new social movements because they combine claims to distribution and claims to recognition—structural issues and identity-related issues (Della Porta and Tarrow 2005; Litcherman 1998). Consequently, the participant observer's position will be influenced by political ideologies and sympathies as well as nationality and possibly social class. To identify the two extremes on the overt/covert continuum, we draw on Gold's (1958) roles of the "participant as observer" and "complete participant" to represent the idealized forms of full and no disclosure.

Below, we use two examples from our own research to illustrate how the two dimensions of the quadrant can work as a methodological framework for reflexive practice in specific contexts of participant observation.

## *Dissent! and the 2005 Gleneagles G8 Summit Protests*

This example draws on the case of Dissent!—Network of Resistance Against the G8 Summit (Dissent!) and their planning and enactment of protests at the

2005 Gleneagles G8 Summit in Scotland. Rooted in the British environmental direct action movement, Dissent! was a transnational anticapitalist activist network that formed specifically to launch protests at Gleneagles. Dissent! was emblematic of the loose, purpose-oriented networks of the larger global justice movement that mobilized protests around large international meetings such as G8 summits beginning in the late 1990s.

Research on the media strategies of Dissent! was undertaken by McCurdy (2009) as part of his doctoral studies at the London School of Economics and was based on participant observation with the network and interviews with network members. After a period of electronic participant observation that began in January 2004, face-to-face fieldwork with Dissent! began in October 2004 and continued until August 2005. Using a first-person account written by Patrick McCurdy, this section examines fieldwork situations from his Dissent! research to illustrate how the position of insider and overt researcher shifted during fieldwork and considers the research implications of these changes.

## *Designing the Research Project and Entering the Field*

Understanding why I describe my 2005 G8 research as insider research requires first discussing the project's impetus. My desire to study the media practices of anticapitalist activists at the 2005 Gleneagles G8 stems from my past activism. In the buildup to and during the 2002 Kananaskis G8 Summit in Alberta, Canada, I was an active member of the Calgary-based G8 Activist Network. Among other tasks, I helped establish and run an autonomous media group that facilitated interaction between activists and mainstream news media. This insider experience sparked my academic interest in the relationship between anticapitalist movements and the media and in October 2003, I began my doctoral studies in the United Kingdom.

Social movements are shaped by their national, social, political, and economic context (Della Porta and Tarrow 2005). However, in January 2004, when I first learned of Dissent!, I felt an immediate transnational affinity with the network. Although I was not well versed in the British direct action activist scene and did not share national affinities or experiences, the idea of an international summit mobilization was familiar, and Dissent! took a similar, autonomous, and horizontal approach to its politics and organizing as I had experienced in Canada.

From mid-January until mid-October 2004, I occupied what Gold (1958) termed the "complete observer" by reading all discussions, including

archived messages and posts of relevant network sites and e-mail Listserv. This allowed me to refine my research focus while becoming familiar with Dissent! politics and issues. My first in-person contact with Dissent! came during the European Social Forum (ESF) held in London October 15–17, 2004. On October 16, a workshop entitled "G8 Global Protest and Poverty" was held with representatives from organizations such as People and Planet, Save the Children, Globalise Resistance (GR), and Dissent! to discuss plans for protesting the G8 Summit.

The day before, I had agreed with some Dissent! members to arrive at the ESF early to hand out Dissent! promotional flyers before the workshop. The flyers had the slogan "We are more powerful than they can possibly imagine" on one side with black and white images from past protests and text about Dissent! on the back. While doing this, I was approached by a young female member of GR, a British anticapitalist collation of political parties, nongovernmental organizations (NGOs), and activists. Katrina (not her real name) told me that she was afraid that some Dissent! members might resort to violence during the protests and reservations that Dissent! was not working with GR in planning protests.

My interaction with Katrina enforces the role of perception—my own and others—and context in ascribing insider/outsider status in the ever-shifting grounds of overt and covert research. Katrina perceived me as a Dissent! insider in Merton's (1972:21) classic sense of the word; a member of Dissent!, and thus as an appropriate outlet for her concerns about the network. Moreover, although I disclosed my researcher status to Dissent! members at the ESF, I chose not to disclose this to Katrina as she was not a member of Dissent!. Thus, looking at my role as a participant observer from Katrina's perspective, I could be seen as occupying a space in the covert/insider aspect of the quadrant (see Figure 1: Dissent! Position 1). Yet, as I had disclosed my research status to Dissent! members, I would position myself within the overt/insider aspect of the quadrant (see Figure 1: Dissent! Position 2).

While the nuances of such positions are debatable, the larger point revolves around the need to acknowledge how social context as well as our own feelings and emotions impact how we see ourselves and, in turn, how others may, or may not, see us as researchers. And such perceptions change over time. In my case, after initially feeling unsure of my status within Dissent!, over the next 10 months, through developing a greater familiarity and affinity with network members and taking a more active role, I came to see myself as more of an insider and also came to be treated as such (see Figure 1: Position 3).

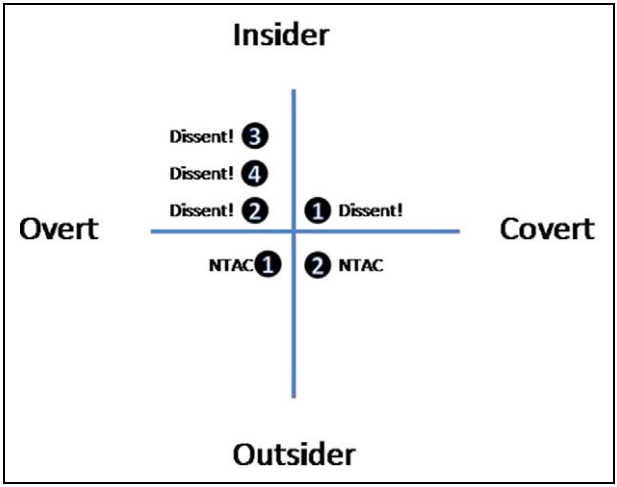


**Figure 1.** A four-quadrant approach to participant observation.

## *Network Access, Degrees of Overtness, and Shifting Field Sites*

I decided early on in my research to take an overt approach to fieldwork and thereby disclosed my researcher status to Dissent! members. Conducting overt research within a social movement requires, among other things, establishing a particular level of trust and acceptance (Plows 2002:76). One strategy to gain the trust and acceptance of Dissent! network members was to disclose my research status early on. As a matter of good practice, I informed network members as soon as possible—usually when meeting them the first time—of my interest in studying Dissent! and sought their consent for my continued participation. However, my role as a researcher would not have been immediately apparent to all Dissent! members. This is because I disclosed my academic interest to network members on an individual level and did not pursue informed consent in group settings such as network meetings.

By not overtly stating my position as a researcher to all network members, some people who may have objected to my presence were not given the opportunity to do so. While a valid criticism, I feel two factors justify this strategy. First, the fluid nature of Dissent! meant obtaining informed consent from all members would have been an almost impossible task. This would have required an announcement at each event and a potentially heated discussion among network members that could have been ostracizing for me.

Second, as a radical social movement, Dissent! may be considered a more "closed" than "open" field site (Jorgensen 1989:42). Although by no means secretive, there was a healthy skepticism of any form of surveillance, including that of researchers. Consequently, a level of negotiation was required to gain entry and acceptance. As part of this process, I often referred to my activist background in my early conversations with network members. This helped establish me as an insider and certainly eased network access. Network access may also have been facilitated by the high number of PhD students in the network, though I was the only one studying Dissent!. Nonetheless, a common joke was that PhD students—as opposed to police and journalists—were the new social movement infiltrators.

My presence in Dissent! started relatively early in the network's trajectory, when national meetings would only attract about 30–40 people. This gave me an opportunity to build trust with key network members and be accepted into the group. This also meant that I was present as group membership grew, arguably making me more of an insider as new members joined. A danger with this close level of involvement (yet part of the point of participant observation) is that people might have forgotten that I was a researcher and they were being studied. The only time where there was a real conflict between my roles as a researcher and as a participant observer came during the actual protests in Scotland when I was asked a few times by Dissent! media group members to help them by doing a interviews with Canadian media. I politely declined as I felt it was not my position to speak to the media about the event I was studying. Group members accepted this point, and I do not feel it impacted my standing in Dissent!.

Participant observation within social movement research and at protests in particular presents a very real danger of getting caught up in the moment and losing track of one's research purpose as protests can be intense, exhilarating, and even dangerous environments. As a researcher and network member who had seen Dissent! expand and as someone who actively participated in planning for "the big day" of protest, the protests themselves were the culmination of months of work for both network members and me. Yet, it was important—though at times difficult—to stay mindful of my fieldwork's purpose. Doing so helped me contextualize my affinity with Dissent!, dampened my desire to seek out experiences that could have detracted from the purpose of my research, and, I believe, helped reduce the danger of being too close to my object of study. Finally, although I exited fieldwork feeling as a Dissent! insider, following Roseneil (1995:9), I achieved a further level of "critical distance" once I completed fieldwork (see Figure 1: Position 4). Having left the field, I had time to

critically reflect, examine, and question my experiences, including shifts between my status as insider and outsider and overt and covert researcher.

## The NTAC Network and the 2009 UN Climate Conference Protests

The following examples come from participant observation and interviews conducted in 2009 and 2010 with Danish radical activists affiliated with the transnational NTAC network. The NTAC network was a transnational social movement network that formed in Copenhagen, Denmark, in 2009 to mobilize for protest against the 15th UN Climate Conference of the Parties (COP15). The network was formed by activists who felt that the protests being planned against the UN climate summit were not confrontational enough. NTAC called for confrontational direct action and, as a result, during the COP15 Conference became marginalized by reformist organizations such as Friends of the Earth and mainstream NGOs present in Copenhagen. The network dissolved itself shortly after the COP15 Conference.

The 4-month project, which included both participant observation at demonstrations and interviews, was a joint undertaking between Tina Askanius and Julie Uldam. It focused on the role of online videos in mobilizing for and fostering commitment to confrontational protests (Uldam and Askanius 2013). Using a first-person account written by Julie Uldam, two fieldwork situations from this research are used to illustrate an overt/outsider position as an initial research position (see Figure 1: NTAC Position 1) and a covert/outsider position at a public mass demonstration (see Figure 1: NTAC Position 2). In both cases, the degree of outsiderness was not fixed but shifted during the research. These shifts, along with the overt/covert dynamics, are discussed for each instance.

## Entering the Field: Overt Outsider Research

I began my participant observation as an outsider, a position influenced by both personal experiences and structural aspects (see Figure 1: NTAC Position 1). To begin with, while I had experience with civil disobedience and nonviolent direct action, I was unfamiliar with the confrontational modes of action—such as burning cars or throwing bricks—promoted by the NTAC. Moreover, I did not have prior points of contact with any network members. Thus, my lack of experience with the NTAC's modes of action and my absence of personal bonds with NTAC members positioned me far toward the outsider end of the insider/outsider continuum (Plows 2008; Roseneil 1995).

I was, however, not a total outsider. Being Danish, I shared national and local anchoring with some NTAC affiliates and was also familiar with national and local politics and civic cultures. Shared nationality and local experiences are considered aspects of an insider position (e.g., Hockey 1993). Yet, at the time, I felt that the fact that I did not personally know any of the members of NTAC positioned me at the outsider end of the spectrum. Upon reflection, I attribute this feeling of being an outsider to the particularly skeptical approach that NTAC members and affiliates took toward anyone they did not know personally. This approach was likely the result of the network's precarious situation vis-à-vis the police at the time of research (discussed below).

The feeling of being an outsider, despite telltale groundings such as nationality or cultural familiarity, can have a powerful effect on a researcher. Together, the combination of my inexperience with the NTAC's action repertoire and the absence of personal relations weighted heavier than my structural dimensions of cultural insights.

The view of me as an outsider did not change significantly during the course of research. The main reason for this was the limited time span within which the research was conducted: The direct action events all took place within 2 weeks in December 2009. The remainder of fieldwork spanned from December 2009 to March 2010 and mostly revolved around interviews. This short time in the field did not facilitate the development of personal ties that might have pulled me toward an insider position, replacing the absence of previous personal contact. However, my political sympathies, shared nationality, and previous experiences from other activist contexts enabled me to conduct my research outside the contexts of demonstrations from an overt position.

Reflecting on the overt/covert continuum, I entered the field in a mainly overt manner. As my research focus was video activism, I began by approaching individuals filming at Klimaforum (the alternative climate conference in held Copenhagen) as well as the Klimaforum press team. I tried to be open about my research interests to everyone I approached. This entailed telling my informants that I was sympathetic toward their cause and that the purpose of my research was to understand how political engagement played out in multimodal file-sharing sites around protest events. The rest of my interviewees were recruited through a snowballing approach (see below). At the beginning of all interviews, I still took care to make my research interests explicit.

## *Public Mass Demonstrations: Covert Outsider Researchers*

While my position was overt during the initial phase of fieldwork and during interviews in the sense of Gold's (1958) participant as observer, it was

less straightforward during participant observation at COP15 protest events. Here, the near impossibility of disclosing my identity as a researcher to all protesters meant that my position was covert to most (see Figure 1: NTAC Position 2). Also, although I did not dress for the occasion, I wore clothes that I would regularly wear at direct action events in winter: boots, jeans, and winter coat. As most participants were dressed in similar, casual attire, I did not stand out from the crowd and was not visible as an overt researcher.

This participant observation situation did not involve covert research as deception as problematized by Spicker (2011). Given the large crowd at the event, my role as a researcher remained undisclosed to almost all at the mass demonstration. Thus, although I did not conceal the fact that I was researching the event and had been open with network members in the past, the sheer scale of the event meant that there was an inevitable degree of covertness. My outsider positions along the overt/covert continuum entailed both advantages and disadvantages, particularly in terms of access and subjectivity.

## *Outsider Positions and Access*

The absence of personal bonds made gaining access to activists involved with the NTAC network and Copenhagen's "autonomous" movement difficult. Activists who use confrontational modes of action are in a precarious situation as they sometimes operate in legal gray zones and generally face severe repression from police and state authorities (Hintz and Milan 2010). Consequently, they are cautious about talking to outsiders. At the COP15, the situation was no different for the NTAC network. In their attempt to mobilize for protests against the COP15 Conference, NTAC used YouTube to promote a mobilization video. The video "War on Capitalism" was accompanied by the call for action: "Capitalism is stumbling—Let's make sure it falls. Get prepared with your friends and come to Copenhagen 7th–18th of December. Direct action against the COP15."

The juxtaposition of this narrative of war and images of confrontational protests in the video caught the attention of the Danish police, who (in addition to generally adopting severe methods in preparation for the climate conference such as preemptive arrests) used the media to emphasize a particular interest in the NTAC network (Klein 2009). Therefore, Copenhagen's activist community, and especially the NTAC, was particularly skeptical toward outsiders and constituted a "closed" field site when I began my research (Jorgensen 1989:42). They were constructed as deviant (Becker 1967).

My political sympathies with the NTAC network's critique of a capitalist approach to climate policies played a significant role in reducing the activist community's skepticism toward me and helped me establish rapport with my informants (Mercer 2007). I had previously been involved in anticapitalist protests, albeit symbolic performances of protest rather than protests based on a logic of damage as the one promoted by NTAC. In engaging informants, I drew on my past activist experience as a way of explaining that I was sympathetic to their cause. It could be argued that I used this rapport to background my position as an outsider (Bernard 2011). My interviews were based on a snowballing approach that helped decrease informants' skepticism toward me from one interview to the next. It thus induced trust. Given my position toward the outsider end of the insider/outsider continuum, this trust was significant for gaining access, highlighting the interrelationship between insider/outsider and overt/covert positions.

As mass demonstrations against COP15 were public, my outsider position did not provide obstacles to accessing and participating in them. However, being a participant observer in direct action protests where the researcher may be witness to criminal damage requires deciding what information will be written down, creating a tension between research and activist trust, as participant observation poses a security risk for informants. Aware that field notes might be seized by authorities, I decided not to take notes during the protests but to observe and subsequently write down my observations later. I also discussed issues of security at demonstrations at ensuing interviews.

## *Outsider Positions and Subjectivity and Bias*

Although the outsider researcher will usually have fewer blind spots in terms of interpretation (Plows 2008), the insider researcher has the advantage of familiarity of understanding the contexts of practices (Hodkinson 2005; Juris 2007).

My inexperience with the confrontational modes of action promoted by the NTAC network enabled me to identify both strategic and affective purposes of their choice of modes of action. This helped me pin down a focus of enquiry for my ensuing interviews more quickly. Had a logic of damage also driven the modes of action that I had experience with, I might have needed more time for self-reflexivity to be able to tune into this dual purpose of NTAC's action repertoire. This was an advantage, as fieldwork for this case was constrained by a relatively short time frame. However, this aspect of my outsider status also impeded my understanding of the interplay

between a logic of damage and political engagement, which more time in the field—and a gravitation toward an insider position—might have facilitated.

The structural aspects of my researcher position—my shared nationality and local experiences of politics with the network and other activists—enabled me to have conversations with activists about recent authorizations granted the Danish police, such as preemptive arrests, grounded in a shared understanding of the political climate and history of police practices at demonstrations in Denmark. This facilitated my understanding of the role of confrontational protests as reactions against these local particulars and gave me the possibility to compare my transnational experiences against the Danish context.

My political sympathies with NTAC's agenda had two main implications: (1) they facilitated access and (2) they required a reflexive approach to my biased values despite my outsider position.

## Conclusion

In this article, we have proposed a quadrant of insider/outsider and covert/overt positions in participant observation. In proposing this quadrant, our objective has been to open up the continua of overt/covert and insider/outsider to create a space for researchers to reflect on the (structural and identity-related) issues that influence our positions in participant observation and their implications for access, subjectivity, and political bias. We are not proposing the quadrant as a tool that is static; we recognize that one's position may shift numerous times during fieldwork. Instead, our goal is to offer a heuristic tool for participant observers to reflect on the practicalities, ethical responsibilities, and epistemological implications of these shifts during the research process.

Such an exercise is useful before entering the field to understand the positions and responsibilities and during fieldwork to navigate the tensions in research objectives and the ethical implications of the research. Used after fieldwork, it can allow researchers to reflect on how their research strategy shifted over the course of the project as their positions changed and how this impacts their findings. The implications of positions to one's research are contextual. They therefore need to be considered specifically in each case, before, during, and after fieldwork.

In both social movement examples discussed, multiple dimensions influenced our positions as participant observers on the insider/outsider and overt/covert continuums, making these positions ambiguous, but with an

overall gravitation toward one end of each continuum. The weight assigned to each dimension is not predefined or fixed. Rather, in many ways, it is subjective and contingent on the importance the researcher ascribes to each dimension. In this way, debates on participant observer positions are not just about defining categories of observer roles but also about acknowledging the subjectivity of participant observation as a methodology indebted to social constructivism. Therefore, we hope our quadrant can also serve as a starting point for discussions around how we come to be insiders or outsiders as positions that are related to how we think about ourselves in relation to our research.

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