

Hierarchy and inequality in research: Practices, ethics and experiences

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Abstract

Research as a social practice enacts social hierarchies in the relation between researcher and the researched. Taking up the critique of the consequences of such hierarchies in the production of knowledge, participatory methods aim to decolonize this power relation. This article contributes to this topic by discussing limits of participation, highlighting the often unexpected reemergence of power and hierarchies in a leveled research field. We take a closer look at how inequalities are emerging and negotiated in the research process. Troublings of hierarchies during the research process are considered as eminently productive for the analysis of social inequalities and for maintaining a precarious ethics of care in the research process. Other articles that also contribute to the special issue opened by this contribution analyze sources and expressions of hierarchy and power troubles during qualitative research by putting a specific focus on unforeseen challenges, inversions, and obstacles that arise during research processes. The contributions demonstrate what specific insights into social inequalities can be gained through an analytical focus on such troubles. It is demonstrated that a critical reflection of inequalities in research relations can also be a contribution to research on social inequalities in general.

Keywords

Inequality, power relations, reflexivity, participatory research, research ethics

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The relation between researcher and their research subjects is a well-established issue of reflection and inquiry in the social sciences (Berger, 2013; Bourdieu and Wacquant, 1992). Especially gender studies and postcolonial critiques (Collins, 2000; Haraway, 1988; Hoppe, 2021;) have demonstrated, for example, in articulating a standpoint theory (Harding, 1986), the pressing need for greater attention to the hegemony of a white and androcentric perspective. This results in wide ranging consequences for research as a social practice in which perspectives, voices, and experiences of marginalized social groups are mostly excluded. Main concerns in this context are inequalities in status and in access to knowledge, along with a clear hierarchy that affects how research outcomes are produced and presented, usually out of the reach of research subjects (Chen, 2011; Elwood and Martin, 2000; Karnieli-Miller et al., 2009; Shah, 2006; Vähäsantanen and Saarinen, 2012). A decolonization of such power issues between researcher and the researched (Datta, 2018) within the research process aims to “break down barriers between the researchers and researched” (Maiter et al., 2013: 198) and can lay the ground for the development of participatory research methods. But the aim of solving issues surrounding hierarchies in research relations through participation of the researched as co-researcher is not easy to fulfill and has its limits. Critics argue that this aim brings with it some fundamental challenges as the researched cannot easily and rapidly adapt or learn the necessary skills and competencies of the researcher—normally developed through long learning processes at universities and research centers. Furthermore, the participation of the researched has also been shown to potentially have negative effects on developing an interpretation of the data (Flick and Herold 2021).

In this special issue, we take a closer look at how hierarchies and inequalities are emerging and how they are negotiated in the research process. Publications consider inversion and destabilization of hierarchies often as a problematic fault suddenly occurring during research, such as in the case of an interviewees’ silence during an interview (Torbenfeldt Bengtsson and Fynbo, 2018) or in relation to researcher’s emotions (Gemignani, 2011). Instead, we inspect such troublings of hierarchies during the research process as eminently productive for the analysis of social inequalities—even though they also can figure as significant obstacles for the involved actors and for the achievement of the original research goals. We intend to show productive uses of such power troubles for analyzing social inequalities like class, gender, racism or its intersections. This special issue delivers mainly on two themes:

First, the articles analyze sources and expressions of hierarchy and power troubles during qualitative research by putting a specific focus on unforeseen challenges and obstacles during the research process.

Second, the contributions show what specific insights into social inequalities can be gained through an analytical focus on such troubles. We demonstrate that a critical reflection of inequalities in research relations can also be a contribution to research on social inequalities in general.

The contributions look at events and processes in which traditional hierarchies are expected to dominate the research process, but then become challenged or undermined. This contributes to fill the gap in methodological reflection by systematically examining the specific complications of power relations that arise within contexts where hierarchies are being destabilized or inverted. The issue retraces how recent methodological developments and an increased focus on openness about problematic situations, challenges, and failures in research (Harrowell et al., 2018; Horton, 2008; Ross and Call-Cummings, 2019; Tracy, 2010), allow for a necessary reevaluation of the ways in which social hierarchies are negotiated in different kinds of research practices and settings.

The contributions thus emphasize the tension between established patterns of hierarchy and spontaneous and unexpected events and experiences. How do those involved in the research process affect each other? Which kinds of social positionalities (related to class, gender, language, body, ...) are played out in research practices and who is involved or pulled into the relation? How are others, things, animals, photos, you tube clips, superiors, guidelines etc. evoked and mobilized? While the inversion or destabilization of hierarchies during research can be experienced as a complication, it can also be highly relevant for the research questions and how they should be addressed. When, how and why did it come to such a destabilization, how do the different actors that are involved respond in the here and now, and what kind of trajectory might result from such more-or-less unexpected incidents?

Taking these aspects together, hierarchy in research is not a stable, pre-established relation, but rather dynamically produced in ethical maneuverings (Whiteman 2018). This entails a need for empirically based reflection and contextual ethical awareness and this is precisely where this special issue aims to contributing to existing research.

Establishing science, establishing epistemic authority

Research in the social sciences moves between different poles, where one is connected to a traditional idea of science being detached from what it studies. In this understanding subjects become objects or even numbers, thus enabling the research to establish what has become called objectivity (Porter, 1992). The other pole is connected to the idea that researchers as subjects engage with other subjects, who participate in the study and who negotiate meaning together with the researcher (Bennett and Brunner, 2020). Before going into research landscapes that are gathered around the second pole, we want to briefly make a foray into the realm of a traditional understanding of science being about objectivity and detachment. We do this to bring along some ideas, to inspect if and how they create friction or resonance with methodological formations located closer to the subjective and participatory pole of research.

While there is a range of radical critiques of the ideas of universality and of reason, the idea of universality has engendered and been used in the context of various academic and more-than-academic enterprises that revolve around empowerment and equality for marginalized individuals and groups (Chouliaraki, 2002). Universality has been mustered as the background of human rights, and to establish fundamental norms. One of the reasons for why it was possible to push these norms is exactly the fact that they are

supposed to *not* be particular, *not* just reflect the standpoint of a specific group, or clique with its specific culture, religion or mindset. Their individual value is supposed to be connected to every human being in the same way—which also implies that nonhuman beings or entities are not included. This idea of universality seemed to provide a solid ground from which to argue, critique, or fight for human rights and similar progressive ventures. But it also included mechanisms of exclusion and claims for superiority.

An idea that comes from a similar, but not the same ontological and epistemological territory is evoked by the terms impartiality and neutrality. Here, objectivity is not supplied on the foundation of reason or universality as such, but it is something that needs to be achieved or maintained in a relation. An interesting and ambivalent figure appears in this context: the stranger. Used as a metaphor but also to understand one's own position in relation to those that are being studied, the stranger is somewhat of a classic, being invoked by Georg Simmel (Wolff, 1950: 402–408) explicitly in relation to the researcher's position, and by Norbert Elias (Elias and Scotson, 1965/2008) and Erving Goffman (Goffman, 1963). While not explicitly or systematically discussed as a synonym for the researcher, the figure of the stranger is connected to a position of objectivity.

“He is not radically committed to the unique ingredients and peculiar tendencies of the group, and therefore approaches them with the specific attitude of ‘objectivity.’ But objectivity does not simply involve passivity and detachment; it is a particular structure composed of distance and nearness, indifference and involvement.” (Simmel in Wolff, 1950: 403)

The important notion in the context of this special issue is that the researcher needs to negotiate an ambivalent position that is to some degree ‘in’ the group or setting that is studied, but at the same time on the outside. How often and how deeply a researcher is inside and involved, or outside and detached, and what kinds of traces this leaves both in the embodied researcher and in the participants of a study varies a lot. Nevertheless, these negotiations—and the insights they provide on the researcher's positionality—enable specific and limited modes of generalization (Payne and Williams, 2005; Thomas, 2010; Wendt, 2020). Seen from the outside, but also understood and felt from the inside, researchers can decide to take a stance or try to achieve and maintain a specific kind of neutrality.

As becomes evident in Simmel's quote, the stranger is a figure that needs to negotiate her position. While Simmel's use of the male pronoun can be attributed to the historical period, it also displays preconceptions about the stranger being connected to specifically male positions in society, such as the traveler. This also applies to the emotionally detached researcher that is just passing through his “field” of research, ready to disengage at any moment, leaving the “natives” behind. It is precisely this fiction of passing through, looking at, keeping an observers' distance that, when examined with a sense for power differentials, displays its colonial undertones. This is because the researcher is by socio-economic and academic status benefiting from hierarchical advantages. The researcher is also benefiting from a different kind of mobility—as he or she can and will eventually leave the field and thus leave the sorrows and passions of those they study behind.

Depending on how the negotiation of indifference and involvement plays out, another risk associated with positions of impartiality or neutrality is that the potentials of involvement, participation and engagement are lost (Ayrton, 2019; Antaki et al., 2015; Little and Little, 2021). On the one hand, these potentials can be located on the side of the researcher and the quality of a study as such. This is the case when the researcher does not get sufficient access or insight into the phenomena that are being studied. On the other hand, this can also reduce the potential for positive ‘impact’, such as empowerment or possibilities for development of those who participate in and contribute to the study.

However, as the cases discussed in this special issue show, only highlighting this side of the researcher-researched relation also misses out important aspects that demand scrutiny and reflection. Painting a picture of the researcher as the stranger that is just passing through emphasizes misconceptions about the stranger as being disaffected and free-floating.

Disturbing the role of the researcher—hierarchies and destabilizations

We, the researchers, are as individuals not irrelevant during our research, not in developing ideas for a project, not in carrying it out and also not while in touch with those who are the subjects of our research. Research encounters bring people with different social backgrounds into contact. These contacts and encounters can create frictions and disturbances linked to class, gender, racism, and marginalizations (Shaw et al., 2019/2020). During the research process, our social position as researchers is put into motion together with these multiple dimensions of inequality, making this process a relevant area of enquiry that accounts for how we conduct our research and how we ask questions. This is especially tangible in research projects that involve autobiographic elements as parts of their approach. In such cases, biographic reflections about one’s own lifetime are positioned in relation to societal structures (Eribon, 2013; Hanssen, 2018; Stanley, 1993). This strand of research rests on a stance that does not put clear divisions between work and personal life. Other examples can be seen also in reflections of personal experiences in autoethnographies (Boylorn and Orbe, 2021; Jones et al., 2013; Wacquant, 2003). These approaches activate one’s own biography and experiences in relation to a field of study. Accordingly, it is no surprise that the person of the researcher can here also be understood as the eminent instrument for data collection, analysis and interpretation. However, there is no automatism that would bring along a critical reflection of one’s own biography or experiences, which contextualizes and places these processes in a society which is itself permeated by rifts connected to class, gender, racism, sexuality etc.

The researchers’ abilities to ask questions, to reflect and to customize the research process are based on the habitus and specific identity based knowledge related to the researchers’ social position. Equipped in this way, we as researchers usually encounter research participants as “others”—study objects, informants, guinea pigs—in interview settings as well as during participant observations. These self-other relations are case specific and relate to the social positions of the researcher and the other. They can, for example, be analyzed with an intersectional perspective (Hamilton 2020) or by examining

it with a focus on the different roles taken by those that are co-present to each other and see the role-play with Goffman (1959) as characterized by methods we use to manage and control the impressions we make on each other. Another approach would be to locate these encounters on a social field where people negotiate their positions as actors that have embodied a specific kind of habitus (Bourdieu, 1984). Yet, another take on these relations can be connected to the multiple ways in which we cope with stereotyped images and expectations we ascribe in others and ourselves based on gender (Butler, 1993). Or, we can try to connect situational negotiations to more prolonged or even historical processes by assigning them to specific figurations in the way Norbert Elias (1965) does. Additionally, these negotiations are related to the rules and conditions of specific social fields. This becomes even more complicated when different social fields and institutions overlap. For differences between the ways institutions such as university, church or the military affect the rules of play in a social field, and how these can come into friction with other rules of social interactions, for example, appropriate or inappropriate questions.

All of these examples show that what is true for the study of society in general also holds true for social interactions between researchers and those that are the objects or subjects of their research. Here, we as researchers but also as specific individuals that have light skin or not (sometimes depending on circumstances, as discussed by Shakthi, 2020), that have sexual preferences and habitualized ways of presenting ourselves are confronted with specific expectations about ourselves, about our habitus and the roles we have to embody, while we vice versa as researchers and as “regular” members of society bring along our own expectations about the others, which in turn affect our research project and the research situations that it engenders (Johansson et al., 2021).

This is what we have to take care of. We need to examine how our expectations and responses meet and intertwine with the expectations and responses of those who participate in our research—this is also the main topic of the contribution by Philips, Christensen-Strynø and Frølund in this special issue. We could end up devaluing behaviors or displays that are unknown to us, instead of trying to understand and analyze the logic of these on their own term. Practices of self-reflection (Bourdieu and Wacquant, 1992) and decolonial positioning (Kulnik et al., 2020; Mignolo, 2020) of accounting for our standpoints, social positions, and knowledge aims help in understanding our activities, reactions, and responses and what is enacted by those we encounter in our research. The position of the researcher is characterized as being more powerful due to its anchoring in a culture where writing and scholarly certificates are connected to societal significance and to power over giving or not giving voice to others (Chadwick, 2021; Clifford and Marcus, 1986; Kara, 2017; Tuhiwai Smith, 2012). But it is too simple to conclude that researchers are always the more powerful in that process. As elite research (Mikecz, 2012; Lillie and Ayling, 2020) but also other examples such as those discussed in this special issue demonstrate vividly, research subjects also can muster resources and embodied power that can affect the research process strongly or even discriminate or devalue the researchers—thus inverting supposedly established hierarchies in a more or less fundamental or lasting manner.

These destabilizations are connected to and enacted in complex fields, which makes mapping them a tricky if not impossible task, at least when thought about in general terms.

They are connected to institutions that assign competencies and positions, giving specific responsibilities and authorities to its members. They are connected to embodied and habitualized patterns of perceiving and acting that privilege certain kinds of dominant identity formations and discriminate others. They happen in the backs of our heads, being suppressed or pushed to the front of our attention. They are anchored in our imaginations, ideas and expectations—about ourselves, about those we meet, about what research should look and feel like, about project deadlines, supervisors, funding agencies, institutional review boards, and more. All these factors are set into motion in our research, they penetrate our skin and the skin of those that we engage with, or they peel off, stay in a distance, creating no-touch relations that again enable and disable different understandings of what we study and how we affect and are affected.

Positionality and the limits of openness/transparency

Connecting our considerations about the highly complex research landscape with its multilayered hierarchies with what we wrote in the first section on epistemic authority, we want to stick our probing fingers into one final dilemma before we close this introduction. Issues of positionality clearly are part and parcel of the research that happens ‘out there’, in the field, in encounters, observations, interviews and engagements with our research subjects (Johansson et al., 2021). But we do not get rid of these issues when we return to the keyboard and the academic publishing landscape. Also here, we do have institutional, relational, and cultural factors that affect what we (think we can) do or not do.

On an institutional level, different positions can become relevant when we consider the different hierarchies and inequalities that affect what we write and what gets published or not published, along with where it gets published. Am I part of the academic center, preferably being employed in an English-language institution with a good reputation, closely knit with other such institutions, where one gets to know publishers and editors and has access to people who can guide one through the different loopholes required? Or do I sit, precariously (non-)financed in an institution on the academic periphery in a widely understood global south-east? (Englander and López-Bonilla, 2011; Kong and Qian, 2019) How big are the pressures to succumb to what one perceives as established norms, even though one might be expected to be norm-breaking, but in only in the right but somehow completely opaque way? How open can we be about the hierarchies and inequalities that we encounter in our research when we do not even know enough about the hierarchies and inequalities on our own academic playing field?

On a relational level, how precarious is our position? Are we working to get our first articles published as part of a PhD thesis, are we trying to establish ourselves in whatever kind of field or discipline or transdisciplinary problem-oriented research landscape that might give us a postdoc position, or have we reached what we imagined as a tenured and permanent academic haven? Do we see possibilities to address failures, or do we feel the need to put a veil of silence over them? (Davies et al., 2020/2021; Sjøvoll, Grothen and Frers, 2020)

On a research-cultural level, how open can I be in the face of institutional review boards, writing our projects into regulations that focus on GDPR, privacy, and informed

consent but not really engaging with situational ethics? Who are my peers and those who will decide about hiring me here and now or sometime in the future? Will they have a taste for radical academic honesty and openness, or will they see such an open and vulnerable position as a threat to the epistemic authority of science? An authority that is under attack in a post-factual world where misinformation rules and hard knowledge is deemed the right counter?

This mix of different positionalities makes it likely that we will meet walls, that we will be hurt. Sometimes head-on, sometimes more subtle and slowly. Finding out how and where we can deal with hierarchies and inequalities in research thus includes not only dealing with the complexity “out there,” but also with the challenges we participate in building “in here.” Hopefully, this special issue, along with similar discussions in this and related journals, will create more and more openings and possibilities to not only work around these issues, but engage with them and change them for the better.

Contributions

This issue starts with an article by Bethan Harries that revolves around the role of sexualization and the experience of sexual harassment in ordinary research interactions.

Her paper puts a specific focus on building rapport and a sense of familiarity that is essential for coproduction in research. In doing so, the paper analyses the under-communicated tension between approaches based on openness and rapport and the embodied risks and problems that these can entail.

Against the backdrop of the socio-ecological crisis Paul Hurley and Emma Roe highlight the intersecting inequalities both among and between humans and nonhumans during research. The authors reflect on the research project “Man Food: Exploring men’s opportunities for ‘becoming an ecological citizen’ through protein-related food practices” not only to understand but also to address hierarchies experienced around food, ecology and gender. The article reflects upon issues of hierarchy and inequality encountered in participatory workshops and in the production of an artistic audio walk. This and other issues are explored in the article through reflections on a methodological approach that combines more-than-human geography with participatory and creative methods.

Mattias De Backer critically analyzed the processes that occurred in the context of a project on the stigmatizing topic of radicalization, and the different hierarchies and inequalities that are created in the relationships between researchers, gatekeepers, and participants. The text specifically examines the problems arising in the tension created between the professional ethics of social workers and the ethics and practices of doing research.

In their article, Magnus Mfofo-M’Carthy and Jeff Grischow analyze how projects on disability/mental health in Ghana employ strategies for addressing the challenges of hierarchy and inequality in the research process. This becomes particularly relevant because of the stigma involved in their research amongst individuals diagnosed with mental illness.

Maarja Kaaristo moves the readers’ attention to how power dynamics and hierarchies are negotiated in research situations by the use of humor. Her article demonstrates the

important role of joking and how it is used by both research participants and researchers in order to level researcher–participant hierarchies—but also to reproduce and reaffirm them.

Louise Phillips, Maria Bee Christensen-Strynø, Lisbeth Frølund engage with an ethics of care (Brannelly and Boulton, 2017) approach in their critical reflection about relational ethics in collaborative research. They explore two overarching tensions rooted in the way hierarchies and inequalities also pervade participatory research processes, one touching research’s actual scope for action and transformation, the other unequal investments into and control over representation in the design and facilitation of the research.

The special issue’s focus on research as a process is mirrored by Carla Pascoe Leahy’s examination of three phases of doing interview research: before, during and after the interview. In all of these phases, sensitive issues need to be negotiated with an awareness of the researcher’s privileged position and an openness to cues given by the participants. Pascoe Leahy also argues for implementing inversion as a methodological principle, when she discusses the use of a self-interview to enable a different kind of reflection about the hierarchies in play during the interview situation.

In the final article that belongs to this special issue, Fride Haram Klykken employs a similar temporal logic in her article on the implementation of continuous consent, with a before, during and after phase. She shows how the supposedly stable logic of informed consent needs continuous follow-up, reflection and adjustment and how it also includes aspects of implicit consent and dissent that have to be attended to. The inversion of hierarchies is also figuring into the article, when Klykken reflects over instances where participants use and refer to recording devices in a way that gives them unexpected and ambivalent agency.

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