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Challenges and Strategies for the Reflexive Researcher Studying Elite Organizations

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Debates surrounding reflexivity—both as ethics, methods, and research practice—have overwhelmingly focused on weak and vulnerable populations and situations in which the researcher is assumed to be in the more powerful position (Shesterinina 2019, 190). In those contexts, ethically sound practices of do no harm have been amply discussed and the relevance of power imbalances acknowledged (Campbell 2017, 95). But how does all of it apply when the power differential is less clear, and it is the researcher who appears to be—*prima facie*—weak and vulnerable? Building on Eck and Lanigan’s “practical strategies for “doing” reflexivity” (this symposium), I focus on how to practice reflexivity at the interface between the researcher and their respondents. I do so by providing an illustration from an elite context in which the power differential between the researcher and the respondent is not as clear-cut. I find that even when the researcher seems more vulnerable, they retain some power, which needs to be used wisely and ethically, relying on their moral compass.

Contexts in which power differentials are not as clear-cut are particularly fruitful spaces to illustrate the importance of practicing reflexivity for all scholars, regardless of their epistemological orientation. First, positivist-leaning scholarly work with ambitions of “objectivity” has extensively studied elite contexts without really practicing reflexivity (Allison 1971; Feaver 2010). I would like to illustrate, through my own experience as a researcher working on elite contexts, that it was only when I started to practice reflexivity that several crucial organizational dynamics became visible. Practicing reflexivity has improved my own research processes even when earlier on I

was writing in a more “objective” way. “Objectivity” in this context does not mean that positivist work on elites is more objective in any way but it refers instead to rather standardized ways of doing research that make the author disappear in scholarly publications (see Bjarnegård, this symposium for a more systematic reflection). Second, because the debate about reflexivity and research ethics has focused so much on vulnerable groups one is left wondering whether the same ethical standards apply in contexts in which the powerful is the respondent. Practicing reflexivity is therefore crucial also to ensure that we are abiding by appropriate ethical standards of protecting the vulnerable. We should, however, also not forget that practicing reflexivity comes with some cost and trade-offs: reflexivity makes the research process longer and more cumbersome and sometimes at the risk of falling into navel gazing. Practicing reflexivity is no panacea but normalizing it in research processes across epistemological traditions is more important than ever.

Recent research understands elites to be “not as monolithic as often asserted in political science interview literature” (Glass 2021, 438) and encourage us not to think of elites as a binary (i.e., elite vs. non elite). While I study a particularly extreme kind of elite (the military) I think that several insights are transferrable to other types of elites, such as bureaucrats or politicians. The military elite is extreme because of its hierarchical structure, special function, and perceived uniformity. On the one hand, some of the elite dynamics can therefore be seen more distinctly. On the other hand, even this extreme kind of elite may display high levels of heterogeneity which we can expect to see to an even greater extent in other elites.

Drawing on debates about reflexivity from critical, feminist, and positivist perspectives, as well as my own experience, I identify four facets of doing reflexivity in research on the military and extrapolate lessons on how to practice reflexivity in elite contexts. I focus on (1) how to identify where power lies within the organization; (2) the multi-layered dimensions of encounters between the researcher and the respondents; (3) how to practice non-judgmental openness; and (4) knowledge production. These lessons should be useful for practicing reflexivity in elite contexts and beyond whilst also being aware of the trade-offs that come with it.¹⁴

Reflexivity and Multiple Layers of Power and Vulnerability

The first step in practicing reflexivity in elite contexts is about understanding the context one studies. The military is “the organization charged with the use of legitimate, if sometimes contested, use of organized violence” (Ben-Ari 2014, 37). *Prima facie*, service members qualify as elite “individuals or groups who ostensibly have closer proximity to power or particular professional expertise” (Lancaster 2017, 93).¹⁵ Also at lower levels of the military echelon, service members are likely to have greater lethal and physical power over a researcher. Militaries are also highly hierarchical and secretive with strong organizational cultures and collective identities, in which service members give away part of their individual identity to conform. Military cultures are widely recognized to harbor distinct and deeply ingrained visions of masculinities—often glorifying “warrior masculinities”—and role conceptions that guide their actions (Soeters 2018; Ruffa 2018).

Yet, when Lancaster (2017, 96) studied elites, she highlighted that they “were not an homogenous group” and that the power differential between researcher and respondent did not “play out in any predictable or consistent way.” Notwithstanding the strong totalizing tendencies, military power is diffuse and has multiple layers, which the reflexive researcher should try to understand. So, a first important lesson about how to practice reflexivity is to question oneself as to whether one is not looking at the organization in a too homogeneous way. When I started off as a student of military and political elites, I did not know what reflexivity was and whether it was important. I was aiming at identifying somewhat objectively some kind of patterns that I could then carefully describe. Yet, it was only when I started to practice reflexivity, a few years into my fieldwork, that I could start see the multifaceted nature of the military as an organization. In comparison to other elites, one might expect the military to appear *prima facie* more homogenous because of its secretive nature. I suspect however, that other kinds of elites—just like the military—may perform as more homogenous than they actually are.

To start with, practicing reflexivity allowed me to capture more informal dynamics. When understanding where power is, rank matters. Service members serving as non-commissioned soldiers will certainly find themselves in a more vulnerable position than junior officers. But ordering is not only structured by formal hierarchies. A senior officer specializing in logistics will hold less power than an active-duty officer at the same rank in the infantry because of the centrality of combat in most Western militaries. So, learning to read insignia of rank but also understanding the informal hierarchies is of crucial importance. I expect this to be relevant for other, less extreme forms of elites

14 During my research, I conducted about 800 interviews and surveys with military and political elites.

15 In some contexts, and for some audiences, militaries also qualify as repellent groups Gallaher (2009, 129) provides a relatively broad definition and uses “the term repellent—causing distaste or aversion—not to refer to perks of personality and preferences thereof but to an ideology that promotes dominating other groups in society. These sorts of ideologies may be found across the political spectrum. Under this rubric, warlords, guerrillas, paramilitaries, and even some states could be classified as repellent. These groups must, of course, be sufficiently large and organized to present a coherent discourse and back it up with action. While my definition here suggests that violence is part and parcel of the domination process, it need not be. That is, the repellent category also includes groups who provide the vocal and written justification for their quest of domination over other groups in society, even though they leave the actual violence to others.”

as well: while informal hierarchies may be more difficult to detect in the military, we may find that for other, less extreme, elites they might be more widespread, easier to detect.

More importantly, identifying the particularly vulnerable groups and individuals provide both opportunities for establishing rapport and spaces that must be navigated carefully and with care. When conducting a large-scale survey on an Italian battalion in 2013 I remember being approached impromptu by several non-commissioned soldiers being willing to share their frustration with us. Those informal conversations eventually motivated and fed into our paper (Ruffa and Sundberg 2018). As a woman researcher, I am often approached by women soldiers willing to share their experiences, struggles, and difficulties. Gender and race are indeed factors that go beyond rank and unit that structure hierarchies within militaries. The first step is to acknowledge that power in the organization is diffuse and multilayered. The reflexive researcher needs to devote time and attention to understand those formal and informal dynamics.

Practicing Reflexivity and the Encounters with the Respondents

The multilayered encounters between the military and the reflexive researcher are equally important from gaining access to knowledge production (Higate and Cameron 2006; Ben-Ari 2014; Carreiras, Castro, and Frederic 2016). Because the respondent is the powerful one “barriers can be produced to resist the scrutiny of research” (Lancaster 2017, 95; Gallaher 2009). Yet, the literature has highlighted how the boundaries between what civilian and what military is are often blurred (Basham, Belkin, and Gifkins 2015). Furthermore, when studying an all-encompassing organization like the military, the researcher navigates a context with multiple layers of distinctions and potential connections. For instance, being a civilian at a military academy is often perceived differently from being a civilian at a civilian university. While this may seem like a banal and obvious observation, it is not since signaling one’s own provenance can do a lot in terms of access and establishing connection. Becoming aware of that helped make sense of some of the

reactions. Race, gender, age, nationality and having a military background among other layers—shape the ability of the researcher to gain access or establish rapport. Several studies have explored what it means to have several ranges of “otherness” (Townsend-Bell 2009) and intersectionality matters to establish rapport when studying elite contexts. Perhaps surprisingly, cultural proximity does not seem to be the main driver for establishing rapport. It would be interesting to explore whether that would be different in large multinational organizations that are less internally homogenous, such as UN bureaucracies.

Because of the existing racialized hierarchies in UN peacekeeping, being a Western woman facilitated my access to Ghanaian, Indian, Bangladeshi, and Korean peacekeepers in Southern Lebanon (Ruffa 2014). As someone who studied both French and Italian peacekeepers, my ability to access those organizations was different: as an Italian national, I was perceived by the French as mostly innocuous and had easy access, while for the Italians I was a problem, and they did not authorize my visits to Afghanistan for several months. We tend to assume that being an insider means advantages, but my experience with the Italian military shows that this is not self-evident. Doing this in a context in which it is the researcher to be more vulnerable requires the researcher to be aware not only of the ethical implications of her research but also of her access to the sites and most importantly her own safety. Self-awareness of the multilayered nature of the researcher’s identity facilitates establishing connections with the pockets of vulnerabilities in the organizational structure. I did not see these distinctions before I started to practice reflexivity.

The reflexive researcher needs to access information and make contacts, becoming aware of its ascribed outsider status and how to navigate it. This outsider status is particularly strong and detrimental when studying the military as “the inbuilt suspicion of outsiders found in any large-scale organization is intensified by the armed forces being the organization associated with national security” (Ben-Ari 2014, 31). Naïveté—the perception of being innocuous and ignorant—is almost unavoidable under these circumstances

and comes with the fact of being an outsider, in this case a Western civilian woman researcher. An important distinction to make is between “performed naïveté” as a deliberate strategy or the acknowledgement of the fact that being read as naïve is a reality that has certain consequences. As an outsider, I will be perceived as naïve simply because I have chosen a different career path. So, there is an unavoidable dimension to it, which is in the eyes of the powerful organization and how naïve one is perceived to be depends on the layers of separation between the researcher and the respondents. The extent in which naïveté is an acceptable methodological strategy is more contested. Some see the benefits of performing gender stereotypes (Alberti and Jenne, 2019, 53) but the use of naïveté is an acceptable strategy only to some extent and one must find one’s limits in one’s integrity and truthfulness. False naïveté can also disrupt rapport or make respondents suspicious. So if it is possible, one should practice naïveté in a genuine way, just as a way of being curious and willing to learn. Naïveté may be a powerful way to get great responses but needs to be handled with care and one should resist the temptation to use it as a deliberate strategy.

Practicing Non-Judgmental Curiosity

Vulnerable people in elite contexts deserve the same kind of do no harm ethic warranted to anyone else, but it remains somewhat unclear how to practice reflexivity with powerful research participants. First and foremost, do no harm applies to them too. But how do we practice reflexivity in those contexts? A useful lesson comes from Jane Addams who “actively engaged with members of the military (...) had no military background, and was a fervent opponent of militarism and war” (Ruffa and Tulp 2022). For Jane Addams, we need to be able to still engage with our respondents as humans to humans. For less extreme elite, this may be easier at times but not necessarily, in highly polarized professional spaces, such as political elites.

The researcher needs to deeply reflect on one’s own identity and how to portray oneself while studying those elites. Researchers investigating

repellent groups have hidden some of their beliefs for fear of being denied access (Gallaher 2009). In my own work—once I started to practice reflexivity—I have chosen the opposite approach: I have revealed openly my political and normative views, but I have also tried to cultivate and express a nonjudgmental openness and curiosity towards my respondents. When asked I have always been open about my pacifist-leaning views and I have used symbols to communicate that very clearly. When I was hosted by the Italian contingent in Afghanistan during my PhD, I walked around in the base with a red coat—that underscored me being different from the rest of the people there, all dressed in uniform. All of my respondents know—or assume, if they do not ask directly —that I am someone who distinguishes herself as much as possible from the military identity. At the same time, I have always been genuinely curious to understand human beings, servicemembers and organizations that are profoundly different from the context I live in. This posture—a sort of “non-judgmental curiosity”—has allowed me to navigate, learn and understand powerful organizations and get to know powerful people without ever forgetting that I was and remain different. Importantly, there is an inherently ascribed outsider status that determine the distancing which affects the research and the kinds of answers we get.

Non-judgmental curiosity and openness are key but are not sufficient. One needs to also reflect on how to deal with the information that one receives and how to build the trust that is needed to continue to study these contexts. One can accept compromises but always do it with integrity. I have always accepted making all information concerning my respondents anonymous and removing information that could be militarily sensitive but have always refused to allow the military to have any opinion on what is included or not in writing and presentations. What is sensitive is contested and relative and can be used by the powerful to exercise power and cover up information. That is particularly difficult when the researcher finds herself in situations of vulnerability and dependency: when deployed to a warzone and the researcher is dependent on the

military to provide safety, the researcher may be obliged to accept compromises. On the one hand, the reflexive researcher must accept compromises. On the other hand, nonjudgemental openness may allow her to stumble upon information that the organization tried hard to hide and to also constantly ask questions to challenge authority. The interpretivist stance of letting the field talk to us is particularly valid in this context (Kurowska and de Guevara 2020).

When deployed with the Italian army, most of the respondents framed their mission as peacekeeping. But in informal contexts—at the canteen, when drinking coffee, whilst being accompanied to different corners of the bases—I kept getting hints at the fact that Italian troops were actually fighting and were at war, which I then wrote about. The very notion of “hanging out” and being able to detect those queues became possible and acceptable only when I started to practice reflexivity (Büger 2021). Understanding the context requires openness but also integrity in terms of how to write and narrate what one is seeing, which affects knowledge production, and without damaging the respondent’s career (see Bjarnegård, this symposium). Cultivating trust, building reputation and credibility are fundamental to ensure access and maintain it. The reflexive researcher needs to constantly and continuously reevaluate and reassess those elements. One needs to humbly reflect on one’s mistakes and let those lessons guide future behavior. One of my most blatant mistakes—and I made many—was when, at the end of my fieldwork, I accepted that the Italian and French military would examine the material I had collected. I accepted because I feared the consequences—I was in Afghanistan, in their bases, at the time—but I then regretted it and ended up submitting just a long abstract in English, which was more than sufficient for those ultimately not-so-interested officers. Being able to address that mistake using my moral compass was crucial. One could imagine this could travel to other elites to. Furthermore, it was only because I included reflexivity in my thinking and started to practice it that I could clearly choose the appropriate course of action.

Reflexivity and Knowledge Production in Elite Settings

Reflexivity when studying the military is fluid and has obvious ramifications for knowledge production. Helpful guidance comes from critical military studies, which “has long been concerned with issues pertaining to epistemology of knowledge and the fluctuating border between what is strictly inside and outside a military sphere” (Danielsson 2022, 5). The military is a secretive and closed organization so to be reflexive is also to be aware of how we—as researchers—contribute to the knowledge production about it. The military may utilize our voice to convey certain messages to the outside. This is particularly relevant for militaries without a strong public relations apparatus. I have often had senior officers telling me: “please make sure to make that point very clear when you write about it,” which I have always refused to do. Notwithstanding the limited readership we reach, it is very important for the reflexive researcher to reflect and make sure that we are not being used as some sort of spoke-person for the military organization. Another risk is that the researcher may be misunderstood in different phases of the knowledge production. One should always ask oneself whether one can stand behind the main take away message. For instance, when studying French and Italian peacekeepers I have tried to shy away from hyper-simplified descriptions about my own research, which may be challenging when talking to policy audiences (see Campbell, this symposium). I did that because I wanted to provide a fair depiction of what they do and how they think but also because I want to continue to study them over the course of my career.

A second important point regarding knowledge production is how we might understand the feminist principle of empowerment and how “bringing back” the research applies to elite contexts (Wibben 2016). The empowerment principle cannot simply be imported in this case, but we could still partly apply it to parts of the organization, particularly its vulnerable pockets. In unexpected ways, we have the opportunity to give voice to the invisible parts of the organization: for instance, women soldiers in a male-dominated context, members

of ethnic minorities, or traumatized people. Along similar lines, we could bring back our findings and contribute to transforming the military in directions we consider appropriate. Understanding the organization in its complexity allows us to adopt different reflexive strategies.

Conclusions

Reflexivity as both a methodological and ethical tool is crucial to work with the vulnerability of the research participants, but it is just as important when we study their relative position of power. Practicing reflexivity in elite contexts suggests that even when studying powerful organizations, power is diffuse. This shapes the quality of our encounters with the organization in which multiple and different layers of our identities become salient. In this context, practicing nonjudgmental curiosity is crucial, as is the openness to compromise without lowering ethical standards and integrity. Lastly, we should not forget how knowledge production may be influenced in unwarranted ways by the powerful organization we study. There again we need to set boundaries, which are to be constantly renegotiated. These considerations should accompany us throughout the research process. We should continuously balance our ability to be open and curious without becoming blind to patriarchal and militaristic structures. Even in elite contexts, we should acknowledge and embrace the human-to-human interaction while being aware of the boundaries we set. Ultimately, we do retain some power, which we need to use to practice reflexivity in ethically sound ways and using our moral compass. At the same time, practicing reflexivity comes with trade-offs: it may make our research slower, and it may be difficult to condense the results of our reflections in ways that are compatible with the formats we are often expected to publish in (see Bjarnegård, this symposium). Still, taken together, practicing reflexivity is an extremely useful methods and research practice that can make our research stronger, richer, and more ethically sound.

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