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SOME METHODOLOGICAL INSIGHTS FROM DOING FIELD STUDY IN MEXICO¹

This case study focuses on my personal experiences of doing ethnography of Mexican community members dealing with drug trafficking. The case contains chiefly methodological reflections over a half-year postdoctoral ethnographic study, as well as my previous ethnographic projects carried out in the Ecuadorian community of Limoncocha and in Polish juvenile detention centers. I discuss the problem of some of the ethical issues connected with researcher involvement in daily activities with participants. Researcher actions undertaken in a field environment may require considerable effort in adjusting one's image (auto-presentation work) to an audience's assumptions and expectations. I also discuss my direct experiences with collecting and analyzing qualitative data to better understand the social conditions and drug-trafficking activities of community members. Data for the case study were collected using in-depth interviews, overt participant observations, and visual data.

Keywords: *detention centers, social conditions, hostile environment, group acceptance, biographical details.*

Исследовано етнографію членів мексиканських кримінальних кругів, займаючихся торгівлею наркотиками. Стаття содержит головним образом методологічні роздуми про етнографічні дослідження, котрі проводились в течение 6 місяців. Також надана інформація про попередні етнографічні проекти, котрі були реалізовані в Еквадорі. Приведені дані про ситуації в польських центрах утримання неосвічених правопорушників. Досліджена проблема визначених етичних питань, пов'язаних з залученням наукових працівників в щоденну діяльність злочинної групи. Дослідницькі заходи, здійснені в польових умовах, потребують значительних зусиль, направлених на корекцію іміджу дослідника з метою задоволення потреб і очікувань публіки. Представлені результати збору і аналізу достовірних даних з метою кращого розуміння соціальних умов і діяльності, пов'язаних з оборотом наркотиків в кримінальних кругах. Это

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тематическое исследование было осуществлено путем сбора данных в искренних беседах, наблюдениях и т.д.

Ключевые слова: центры содержания под стражей, социальные условия, враждебная среда, принятие группой, биографические детали.

Introduction. Imagine, that you have decided to spend your 1-month vacation in a small fishing village far away from the closest big city. All you know of the village is the location of the small house you arranged to stay in. You are supplied with a few things necessary to survive for the first 2 to 3 days (gasoline, food, clothes, map, etc.). On the morning of your first day in the village, you decide to go for a walk to get information from locals that will be useful to you in planning the weeks of your stay here. Trying to obtain information from them, you are facing the first problem: they tend to treat you not seriously but rather as a total stranger, not revealing to you any of the valuable facts you are asking for. You return to the house frustrated, trying to figure out what went wrong. After a couple of hours, you finally come to the conclusion that the questions you asked had nothing in common with reality here. *How could I have asked these folks about Wi-Fi and a shopping mall? It was ridiculous!* The next day, when your emotions have cooled, you decide to change your strategy and listen much more to the fishermen rather than ask (inappropriate) questions and talk. You initiate contact with them by delivering some basic information about yourself and your vacation plans, but what is most important: the willingness to know them better. After your having spent another couple of hours with the fishermen, more than ever focusing on getting familiar with their perspective, they surprise you positively with their openness and readiness to help you. It

is turning point for you because you realize that you want to know them as much as they will allow you to. One week later, the old fisherman whom the others respect the most invites you for supper and then a boat trip. It is at this moment that you begin your adventure with ethnography. This is the moment we should focus on: ethnography as the tool of community study.

What Is Ethnography and What Does It Offer?

If we want to conduct a complex study of a local community, a good strategy is to engage our senses: taste, sight, touch, smell, and hearing to «feel» as much as possible. Our senses give us an opportunity to fully experience the reality that we want to study. However, we should be conscious of how to use these senses properly to obtain empirical data valuable enough for scientific purposes (Gobo & Molle, 2017). If we know the basic rules of how to observe, interact, and create and ask proper questions and we are motivated enough to do this, it is probably the right moment to start. Ethnography gives us a good opportunity to immerse ourselves in local community life, benefiting from obtaining first-hand data by becoming more participant than observer. If we are ready for it, ethnography is a good method to get familiar with a group's dynamics, its norms and values, the attitudes of particular members, and so on (Hammersley & Atkinson, 1995).

Doing Ethnography in a Researcher-Reluctant Community

As we have seen, after a few attempts by the visitor to the fishing vil-

lage to become involved in group activities, the members of the community start to interact with him more openly and cooperate. However, a researcher's actions oriented toward integration with a community are not always rewarded so quickly with group acceptance. There are some conditions that can promote or contribute to a lack of trust or even hostile behavior on the part of community members:

- A huge gap between researcher and community cultural background;
- Stereotypes and prejudices giving rise to community's lack of trust toward research and researcher;
- A community's poor or negative past experiences with research;
- Illegal activities within the community, leading to mistrust of a researcher's intentions;
- Research questions and topics perceived by the community as uncomfortable, inappropriate, or dangerous.

Taking these factors into consideration, Nigel Fielding (2005) makes a distinction between a hostile environment and sensitive topics. The first one he defines as a situation «where the research population is *actively resistant* to research» (Fielding, 2005, p. 249; emphasis added). «Actively resistant» attitude means the activity of a research population focused on limiting the researcher's access to data for reasons felt to be important enough to warrant this behavior. Such an attitude is not necessarily connected with a socially condemned activity on the part the group, or with any well-defined and articulated reason. An unfriendly and closed attitude toward the researcher can be manifested not only in circumstances of a «hostile environment», but also, according to Fielding, in the situation of a «rather passive

respondent group who are getting by quite comfortably *until a researcher comes along and upsets them* by asking about that class of things that are best left unsaid [...]» (Fielding, 2005, p. 249, emphasis added). So it is not the physical presence of the researcher the group defines as a problem, but the topics he or she touches upon and questions he or she asks. The group's inhospitality is aroused at some point, but not from the very beginning.

Fielding's taxonomy is valuable, but it does not cover the whole spectrum of possible options. My studies of community drug-trafficking activities were conducted in field contexts that combined both a «hostile environment» and «sensitive topics». From another perspective, Patricia Adler states that «investigative field research, with emphasis on direct personal observation, interaction, and experience, *is the only way to acquire accurate knowledge about deviant behavior*» (Adler, 1993, p. 11, emphasis added).

The Mexican Community Study: How I got Involved

In preparing my research design to apply for the EURICA scholarship, I assumed that during my planned 6-month stay in Mexico, I would be able to get access to the community and obtain valuable first-hand data. Subsequently, to my surprise, for the first 2-month stay in Mexico, nobody could help me to get access to community that I wanted to study. My project supervisor advised me to stay in the library reading the literature and then conduct interviews with the authors. Colleagues from University in Mexico attempted to convince me that doing ethnography was too risky because of the physical danger linked with direct contact with people who deal in drugs.

Having few options, I decided to share information with my Mexican friends and my Polish friends living in Mexico about my research goals and the need to obtain access to local community members involved in drug trafficking. This strategy paid off after 2 months when one of my Mexican colleagues put me in touch with an informal spiritual leader of a community in which many of the members were drug traffickers. This demonstrated the importance of persistence and luck and how large a gap there often is between a project design and the actual, unpredictable circumstances.

The Role of “Gatekeeper”

An important question is who is the «gatekeeper» in ethnography? The gatekeeper is the person who is a member of the group and permits you to enter the field, usually introducing you to others. Such a gatekeeper should be

- Highly motivated to help us to preserve access to community/group of people we want to study;
- Respected and trusted by the community;
- Able to possess a social position among community members strong enough to help us not only get in touch with them but also to create our positive image that makes involvement process as easy as possible.

In my case, the person who was gatekeeper fulfilled all of these conditions. This person—let us call him Miguel—was crucially important because without his connections, the study itself would not have been possible. Meeting Miguel was the turning point for my project. However, we as researchers should also be aware that sometime the gatekeeper who helps us to get involved in the community can also affect our research, even if unintentionally.

The Process of Researcher Involvement in Community Life

No matter how much help a gatekeeper provides you with getting involved in community life, the identity you create is crucial for your acceptance by your participants. Martyn Hammersley and Paul Atkinson (1995, p. 83) call the researcher’s work on his image «impression management» to underscore how carefully it should be created. The more hostile the social environment and the more sensitive the topic, the greater should be your concern about a group’s perception of your appearance and the more you should be prepared for any possible initiation procedure you will have to face. In my own case, Miguel was not only a vital source of information but also personally recommended me to the group, thus helping to promote my identity as an independent, neutral researcher who knows how to protect the people with whom he speaks. It is important to remember that Mexican culture is based on personal relations, social bonds, and a collectivistic approach to human activity (Hofstede & Hofstede, 2005). Miguel was the person who not only explained the nature of the community’s lifestyle and identity, strong social bonds, family-oriented approach of Mexicans but also supervised my process of group involvement. Nevertheless, the group was constantly questioning and defining my presence and the limits of my activity. At the very beginning of the research, my identity was verified multiple times through different initiation protocols to assure the community about my real intentions and motivations. Verification included the following:

- Showing official papers from my university and the Polish Embassy confirming my official status in Mexico;

- Taking off my clothes to show that I was not a police informant and that I had no cables or recording devices concealed on my person;

- Joining group activities, proving my readiness to take a risk (smoking marijuana).

The verification process was crucial for community members to minimize the risk of possible problems connected with my presence. People who cross-examined me were focused not only on the words I spoke but also on nonverbal communication: facial expressions, gestures, and body position—trying to determine whether all elements of communication were coherent enough that they could believe in my story. After verification, I was able to talk about issues I was interested in. The researcher who carries out research in a hostile environment should be ready for multiple verifications no matter how many of these he or she already passed successfully. Verification of a stranger's identity is vital for community safety and integration.

Winning Community Trust

My ability to do ethnography was based on Miguel and his colleagues' recommendations of me to the community. Thanks to this, I started to visit the community, make first observations, and engage in informal talks (always with Miguel physically present). After the first couple of meetings, community members allowed me to record the first interviews. This order of research activities is not a matter of accident. When we operate in hostile environment and with sensitive topics as well, the researcher should be attentive to the proper order of his scientific activities. First, he should begin with a neutral approach and get involved before asking probing questions—not testing their

acceptance of the research and the researcher. It is certainly not a good idea to start by asking questions directly connected with the research (social organization of drug-trafficking business) goals before a period of observation and successful attempts at winning trust. Miguel suggested that I take part in the religious rituals of the community preparing itself for pilgrimage to Chalma (a famous Mexican sanctuary that is the destination for pilgrimages). Thus, my first observations were linked with cross preparation activities that the group was engaged in. Direct participation in group religious activities and then taking part in a 120-km, 5-day pilgrimage to Chalma was an ideal opportunity to become familiar with community members, earn their trust, and gain access to first-hand data (Ryen, 2005, pp. 234–236). The pilgrimage to Chalma was another turning point in my research. It allowed me to create personal relations with community members engaged in drug trafficking, drug proliferation, drug selling, and cooperating with cartels.

Respecting Group Hierarchy

Doing ethnography, especially in a hostile environment, requires attention to group hierarchy. The more that a group is closed, the more it is usually integrated and hierarchized (Cialdini 2006). This means that when doing field research, we should respect group hierarchy in trying to win trust and acceptance from its leaders. This is not only a matter of their willingness to «open or close the door» but is crucial for reasons of personal safety. Not including the leaders in our efforts to become familiar with group can be dangerous for the researcher as well as other people with whom we start to talk. It is especially important in ethno-

graphic work located in correctional institutions where a group's leaders are used to informally deciding about its members' activities. In the Mexico case, I focused on preserving contact with most respected Chalma pilgrimage participants who, knowing my scientific purposes, started to talk and interact with me revealing to the group their acceptance of my research. To become a group participant, I also had to participate in the group's activities, showing my acceptance and respect for rituals by (for example)

- Carrying San Judas Tadeo and Nino de Atoche figures;
- Singing religious songs and praying (attempts included);
- I got symbolically baptized near Ocuilan de Arteaga by my spiritual patron;
- Sleeping in the same places in the same conditions;
- Eating the same food prepared for the pilgrimages.

Practical Lessons Learned

Taking into account my experiences from ethnographic research carried out in Mexico, as well as 8 years conducting organizational ethnography of Polish juvenile detention centers (Chomczyński, 2017) and Ecuadorian local community studies from Limoncocha (Konecki, Kacperczyk, Chomczyński, & Albarracin, 2013), I recommend the following principles of field research:

- Try not to underestimate intercultural differences (if you are investigating people from a foreign country) or subcultural differences (when you question people from your country but who belong to a different subculture than yours). Try first to become familiar with such cultural differences before you go into the field.

- In beginning research, you first need to know something about the group/community you plan to study (habits, history, culture, basic norms, and values).

- If you plan to do ethnography in a hostile environment, find the right person (gatekeeper) who will help you to create an appropriate image and win group acceptance. Personal recommendations are crucially important for this kind of study.

- Observation should be active. Seize any opportunity to take part in community/group daily activities. (In my organizational ethnography of Polish juvenile detention centers, this included following inmates' daily routine: for example, classes, workshops, cleanings, spending free time in the dormitory.)

- With any group, try to focus on actions oriented toward winning the trust and acceptance of its members, especially its leaders.

- Avoid putting a participant in situation that will encourage him or her to lie. People tend to lie «in defense», when they feel pushed and do not trust the person who questions them. First, you should win the participant's trust and, having done so, recognize that there is still no guarantee that your questions will yield valuable data. Start by discussing daily routines and then stay open for any biographical details that often naturally emerge. In this way, the interview becomes more like a casual conversation, increasing your chances to obtain valuable data.

- Be ready to be continually questioned or even tested by community members. A few times community members asked me to explain my research goals, tell them about my private life, and even to strip to prove I was not

an undercover police informant wearing a recording device.

Conclusion. Designing an ethnographic study, especially one to be performed in a hostile environment and additionally in a foreign country, we should remember that no matter how hard we try to prepare ourselves, there is always the potential for unpredicted events to happen. It is always good practice to spend time observing before

asking any questions. Observations give us the opportunity of gradual involvement in the community/group we want to study. We should allow the group to set the pace of the process of our involvement because the level of acceptance is based on trust, which the researcher has to earn. Winning trust is a process that occurs naturally, and efforts by the researcher to control it are misplaced.

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ДЕЯКІ МЕТОДОЛОГІЧНІ АСПЕКТИ ПРАКТИЧНИХ ДОСЛІДЖЕНЬ У МЕКСИЦІ

Вивчено етнографію членів мексиканських кримінальних груп, що займаються торгівлею наркотиками. Стаття містить головним чином методологічні роздуми щодо етнографічних досліджень, які здійснювалися протягом 6 місяців. Також надано інформацію про мої попередні етнографічні проекти, що були реалізовані в Еквадорі. Подано дані про ситуацію в польських

центрах тримання неповнолітніх правопорушників. Досліджено проблему певних етичних питань, пов'язаних із залученням науковців у щоденну діяльність злочинної групи. Дослідницькі заходи, здійснені в польових умовах, вимагають значних зусиль, спрямованих на коригування іміджу науковця з метою задоволення потреб та очікувань публіки. Надано результати збору й аналізу достовірних даних з метою кращого усвідомлення соціальних умов та дій з обігу наркотиків серед членів кримінальних кіл. Це тематичне дослідження було здійснене шляхом збору даних через щирі бесіди, спостереження тощо.

Ключові слова: центри тримання під вартою, соціальні умови, вороже середовище, прийняття групою, біографічні деталі.

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