Conducting Research in the Middle East's Conflict Zones

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In many people's minds, the Middle East stands out as the world's most dangerous place. I often remark to my colleagues and friends, however, that I feel safer doing field research in most Middle Eastern countries than I would in much of Africa or Latin America. To begin with, few parts of the Middle East suffer from high rates of random crime. Rather, the region's violence is mostly political in nature, and, with the right approach, a researcher can take several steps to minimize risks. I have conducted research in the Kurdish regions of Turkey, Iran, Syria, and Iraq (before and after the 2003 war), in Lebanon, and in Israel-Palestine during the first Intifadah. In this article, I discuss various strategies and issues one faces while "in the field" in regions such as these.

Sources of Information before Setting Out

If a research project demands fieldwork, one of the first steps is to get information about conditions in the region in which you will be conducting research. The United Nations, many NGOs (non-governmental organizations), and the foreign ministries of most states maintain worldwide travel advisories. These are natural first places to look, but are far-from-adequate sources on the issue. Iraq, for example, is currently flagged as a "no travel zone." This designation ignores the fact that northern Iraq, also known as Iraqi Kurdistan, remains a fairly safe place to travel and in which to do research—much safer than many countries rated as safe for travel. Travel to Eastern Turkey is likewise "red flagged" by official sources such as the U.S. State Department and Canadian Ministry of Foreign Affairs, yet remains reasonably safe in the minds of academics, journalists, and tourists who have recently been there. Even in Turkey, a Turkish government official in Istanbul or Ankara will likely warn you against traveling east, while officials stationed in the eastern part of the country will assure you that conditions are pretty stable there. In my own case, I received a stern lecture from Turkish friends in Istanbul and the Canadian Consul in Ankara about how "the Turkish army won't even let you go east, and if they do, the Kurdish guerrillas will kidnap you." I then traveled east, where the Turkish army gave me tea and sandwiches at their bases while explaining the situation there to me, and Kurdish people in the mountains gave me goats' milk and lectures about Kurdistan.

In short, there is no substitute for speaking with people who have recently been to the specific region of a country in which you plan on conducting research. If you are a Westerner or a woman planning on going to a particular region, you need to seek out another Westerner or woman who has been there recently to ask them about both their experience and their assessment of the area. Besides getting superior information about your destination, you may also be offered invaluable contacts and resources to assist you in your research. If you speak with government officials, try to ascertain if they are telling you the official position on the region or their personal view, as well as whether they have been there.

A third source of information should be your own monitoring of the region in which you plan on conducting research—particularly since field research should never precede regular research. By the time you step into the field, you should have a very good idea of why you are there, what questions you hope to answer, and what methods you will use to gather information. Familiarity with news reports and other published sources on the area should give you some idea of the situation there. Such "pre-field" familiarity, as well as the assessments you get from people who have been there recently, should also allow you to decide when the risks are simply too high to merit such a trip.

Knowing Where to Draw the Line

Different people tolerate different levels of risk, and conducting research in a conflict zone undoubtedly entails some risk. Before heading off, you need to decide roughly what level of risk is acceptable to you, and under what circumstances you will call things off once you are in the field. As a general rule of thumb, I am not willing to conduct research in areas where either the state's security forces or insurgents have adopted a policy of targeting categories of people either like myself or for which I might be easily mistaken. From September 2003 to May 2004, for example, I led a research team from McGill University to Iraq. I based the team in relatively safe Iraqi Kurdistan (I had been there in 1994 and 2000, and checked with my local and Western contacts there about prevailing conditions before setting out on the research trip). From the Kurdish Autonomous Zone, I made several trips to Kirkuk, Mosul, and Baghdad as needed. When Iraqi insurgents began actively targeting Western civilians in the spring of 2004, however, I ordered the team (including myself) to cease traveling south of the Kurdish area. We

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adjusted our research plans accordingly. If insurgent attacks on the thousands of Western civilians in the Kurdish region had become frequent (more than once every two months), I would have pulled the team out before our scheduled departure in May 2004. It is important to have clear "red-lines" in mind, because once you are in the field there is a natural reluctance to cancel and leave before you originally intended, which can lead to a psychological minimizing of very real and increasing threats. Finally, if you have reason to believe that you personally have been identified and become a real target, it is likewise time to leave.

Planning for Worst-case Scenarios

Precautions you normally take when traveling, such as preparing emergency contact numbers and contact information for embassies and consulates abroad, should, of course, be applied even more rigorously when traveling to conflict zones. You also need to register with your nearest embassy or consulate, informing them of where you plan to travel and how long you plan to be there. This will make it easier for them to assist you if the need arises.

Run through your mind all the possible worst case scenarios that could arise while you conduct your research. Not only will this help you decide if the risks are acceptable, it will also improve your reaction time should the worst occur. Running these scenarios through your mind should also encourage you to avoid carrying on your person any documents or other items that would prove problematic if they were discovered or confiscated. In order to protect both yourself and the people you interview, you may want to look into ways of encrypting or hiding information on your computer (if you have a laptop with you), or mailing home or depositing documents with someone before entering a conflict zone. Keep in mind that in most conflict zones items sent through the mail may be subject to inspection or "verification" after they leave your possession. You should keep in your possession a very well-hidden reserve of cash (U.S. dollars or euros) in case of emergencies. Regarding bribes, I generally found that I lacked the necessary and very subtle sense of when they were necessary or wise—the few times I reluctantly engaged in such behavior, it was always through a local guide or assistant.

You should definitely avoid having in your possession compromising documents or items when crossing borders: for instance, when crossing into countries such as Syria or Iran, anything written in Hebrew or referring to Israel-Palestine is definitely problematic. When crossing into or out of Turkey, particularly at the Turkish-Iraqi border, anything in Kurdish or with the words "Kurdistan" or "Kurd" in it will either earn you many hours of questioning or land you in prison. I once spent an extra four hours at the Turkish-Iraqi border explaining to Turkish intelligence why I had in my possession a sheet of paper with an address in "Irbil, Iraqi Kurdistan" (it was a pamphlet for a Kurdish French-language institute). What to say in such circumstances is the subject of the following section.

Being Diplomatic

Always remember that conflict zones are not places of free intellectual debate and objective discourse—people die for their beliefs and their associations in these regions, and emotions run high. Contrary to places that suffer from random violence and crime, however, knowing what to say and not say in such places can generally allow you to avoid problems. At the same time, you should strive to be either truthful, non-committal, or silent on delicate issues. In the example I mentioned above, Turkish intelligence officers asked me, "Where is Kurdistan?" Kurdistan is the mountainous region where the borders of Turkey, Iraq, Iran, and Syria meet, although this would have been the very worst answer. Instead, I replied, "I didn't write this pamphlet—it's from a French language institute in northern Iraq." They replied, "Why does it say 'Kurdistan' on it?" I smiled and said "Look, you know they use that term there, and I know it's a sensitive issue for Turkey. It's not my desire or intention to cause you problems." Continuing the dialogue along these lines for several hours, always remaining polite, patient, and truthful, I was soon on my way across the border and still on good terms with the Turkish border officials I would see on many future crossings (soon I knew them by name).

In any case, during interviews in general, and particularly when speaking with parties to a conflict, you should be asking questions rather than stating your own opinions. A researcher should not be in the business of converting people to their points of view, but rather should be learning more about others' views, why they hold them, and the dynamics of the research question in general. In the Middle East, the issues of religion, gender, and Israel-Palestine are especially touchy, and you should not assume that you know the viewpoint of the person with whom you are speaking. By remaining inquisitive and humble regarding your own views, you should be able to steer clear of difficulties and learn a good deal in the process.

Research Ethics in Conflict Zones

Circumstances may arise, however, where you must either be less than truthful or look for somewhere else to conduct your research. States such as Syria and Iran, for instance, require you to state your religion and whether or not you have ever traveled to "occupied Palestine" on your visa application. If you are Jewish or have ever been to Israel-Palestine, you are left with the choice of lying or not receiving a visa. In many cases, applying for a research visa to conduct research on a politically sensitive topic means no visa will be forthcoming, while a tourist visa is easily obtained. You need to think carefully about these issues, and consult with research ethics committees at your university if possible.

In the summer of 1998, I tried to obtain permission from Syrian authorities to cross into the Kurdish Autonomous Zone of northern Iraq. I truthfully told them I was a political science doctoral student. In Syria, however, political science students are seen as political activists rather than students. After waiting for weeks in a dusty, northeastern Syrian border town, I realized that in Syrian Arabic, "*bukra inshallah*" ("tomorrow, God-willing") actually means "Forget about it." Iraqi Kurdish officials later told me that had I said I was an aid worker, archeologist, or something similar, I would have had my permission to cross into Iraq. I do not regret having been forthright, however, and I adjusted my research plans as necessary. The time spent in the dusty border town was not wasted either, as I was able to conduct informal interviews with many Kurdish residents of the area during the weeks I spent there (I was conducting research on Kurdish nationalism).

This leads us to a more important issue regarding research ethics in conflict zones, however. Some of the people you interview may risk arrest, torture, or execution for speaking with you. Although another article in this symposium deals with research ethics, some concerns relating directly to research in conflict zones merit discussion here. If your research institution or granting agency has policies and committees dealing with research ethics, you must consult them before you set off on your project. In my own case, such committees and policies had not yet been formulated when I set off on my doctoral research in Kurdistan. My own policy on the matter consisted of never asking a question that might compromise someone's safety. If they volunteered information to me that I thought might prove dangerous to them, I asked them what steps I should take to protect

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their identity and the information they had given me. I reminded them that they were under absolutely no obligation to tell me anything that might endanger them, and if what they did tell me was delicate in nature, I omitted anything in my notes that might identify them (see "worst-case scenarios" above). In the Syrian example I cited above, this approach led me to fill in my interview notes after I left the country. I had spent weeks with some of my interviewees before they volunteered any information of a delicate nature, and in the publications I produced afterwards, I continued to scrupulously avoid anything that might violate the trust they showed in me.

Snowball Interviewing, Taking Your Time, and Remaining Flexible

Much of the research undertaken in the Middle East, and particularly research addressing politically sensitive matters, remains qualitative rather than quantitative in nature. The data simply is not there, or not credible, for politically sensitive issues, including things as basic as the number of Kurds living in Turkey, Syria, Iraq, or Iran. The limited budgets of many researchers, especially doctoral students, also discourage the large 'n' sampling necessary for quantitative surveys and research.

In my own qualitative research in the region, I quickly discovered that I could overcome the problems imposed by a limited budget without too much difficulty by traveling cheaply and making necessary sacrifices in terms of accommodation and meals. Particularly in unpredictable conflict zones, the resource I needed the most was time. You should multiply the amount of time you think a research project will take you in a conflict zone by at least three or four. It takes *a lot* of time to get a sense for the dynamics at play in such places, to make contacts, get interviews, gain people's trust, think about your changing research (and it *will* change), switch to alternate plans or postpone things due to security concerns, and, in general, to get anything done at all. Be prepared for authorities to deny you access to certain areas or the privilege of crossing their border into another country. Have alternate routes and methods thought out, and be ready for those to fail as well. Lack of flexibility and a tight schedule might otherwise lead you to take unacceptable risks rather than waiting for things to improve or adjusting your plans. Although I prefer not to go into the details here, a tight schedule and an inflexible determination to get into Iraqi Kurdistan in the summer of 1999 (after the previous summer's failed attempt from Syria) landed me in an Iranian detention center for a day. It was all a misunderstanding, of course, although a couple of Revolutionary Guards are probably still talking about how dim-witted a young Canadian tourist can be.

Having a good deal of time at your disposal also allows for what I found to be one of the most important interview techniques available to a qualitative researcher—"snowball interviewing." During each and every interview or discussion, you should ask your interlocutor who else might be knowledgeable on the issue, and how you might arrange to meet them. After conducting more interviews, go back to some of your good, earlier sources and ask them about the new information you learned, or any contradictory accounts that emerged. Although this may seem like fairly self-evident advice, a remarkable number of researchers fail to adequately pursue snowball interviewing. In my own case in Iraq in 2003–2004, this technique got me interviews with high-level Iraqi officials I did not know existed, and into high-level meetings and conferences of the Coalition Provisional Authority (CPA) that I did not originally know were being held. As a way of giving thanks for the access I was granted, I sent copies of my research articles to the Iraqi, U.S. Army, and CPA officials in question, even though these were at times critical (but fair) of some of their policies. They then invited me to more meetings and offered more of their insights and information on matters of interest to me, which is, of course, how one builds a relationship. Researchers who give as well as take find that doors remain open to them.

If you have time on your side, you may also find that basing yourself somewhere allows for a more austere budget and provides several advantages. In the Iraqi example I cited above, my team (three of my former students at McGill University) based itself in the Iraqi Kurdish city of Suleimaniya. Mindful of the principle that researchers should give as well as take, two of my students taught English at the University of Suleimaniya, and I gave occasional lectures on political issues. The university in turn provided us with accommodation, access to their research facilities, and more knowledgeable, helpful, important, and educated contacts (and friends) than we could have ever hoped for—their students and faculty. One of my team members taught English to a class of journalists at the University of Suleimaniya, who in turn provided us with more contacts and insights into Iraqi political life than we could have imagined. The endless mountain picnics we were invited to proved another unanticipated fringe benefit of this arrangement. In sum, we traveled from Canada to Turkey to Iraq and spent eight months in the field on a budget of roughly $3,000 a person. If we had taken out war-zone insurance coverage or hired security contractors, however, the budget would have no doubt been much, much higher.

Two (or more) Is Company

After conducting research both alone and in the company of others, "the more the merrier" strikes me as a very appropriate saying. Especially in the difficult circumstances that research in conflict zones often entails, there is both safety and solace in numbers. Another opinion when it comes to difficult decisions regarding research ethics, safe undertakings, and research design can also prove extremely helpful.

Conclusion

This article focused mainly on strategies for successfully conducting research in conflict zones of the Middle East, illustrated with some personal anecdotes from my own experiences in the field. I omitted the question of research topics and design mainly because good research design remains such wherever it is conducted, and there is already a large literature on the issue. In conflict zones, extra attention must, of course, be paid to 1) research ethics; 2) the various factors that will affect how people respond to your questions (including fearing for their own safety); 3) how the various parties to conflict in the area will react to your presence; 4) the feasibility and flexibility of the research you plan on conducting (given a highly unpredictable and delicate environment); and 5) the level of risk you are willing to accept in order to undertake your research. Each researcher must evaluate these questions carefully before setting out into the field. I generally try to keep two somewhat contradictory phrases in mind when considering a research project: "Nothing risked nothing gained" versus "dead researchers tell no tales."

Notes

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