EDITORIAL

Researching Resistance: Methodological Challenges, Ethical Concerns and the Future of Resistance Studies

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Resistance is a complex phenomenon: dynamic and uncertain, constantly adapting to surrounding power structures and often leading to unpredictable consequences. Metaphorically speaking, it is reminiscent of a river surging through a landscape, adjusting dynamically in relation to the physical conditions of the surroundings: to hills, slopes, ascents and obstacles that momentarily hinder its sweeping progress, but also to trenches and drains that may canalize the river in certain directions. Yet despite how it is affected by the environment, the river itself also contributes to changing this very landscape. In the same way, power and resistance operate in a mutually constitutive relation: forming and reforming, shaping and reshaping, thus remolding the conditions of its very existence. Underground currents may, in certain circumstances, reach the surface and erupt into sudden cascades that generate waves and ripples across the surface. These can multiply and diffuse, and may ultimately contribute to the radical alteration of the river's shape. Other times, these underground currents may never reach the surface, but gradually and unnoticeably excavate the surrounding terrain, forging underground tunnels and passageways. In these conditions, even the smallest and most seemingly-insignificant changes may sometimes have a large impact, constituting tipping points that lead to global consequences.

In this way, characterized by currents, eddies and storms, as well as moments of lull and calm, resistance is not a linear phenomenon that can easily be measured, calculated or predicted. There are surely ebbs and

flows in the level of activity, but as Taylor (1989) neatly captures with his notion of *abeyance*, decline in movement activity does not constitute its disappearance. On the contrary, resistance tends to endure and prevail even through hard times, though sometimes in less visible forms. Pockets of resistance may thus maintain under the surface, only to suddenly erupt again when structural conditions are more favorable.[1]

As researchers, we have certain access to these flows: a temporal and partial entrance to a dynamic relation undergoing perpetual and often unpredictable change. The methods, tools and instruments we use may thus at best provide us with a limited insight into these processes. While some instruments capture what happens on the surface, others are needed to illuminate the processes occurring underneath. But similar to other social phenomena, there is no universal method capable of dealing with resistance in its entirety. Different methods are needed to cast light on different aspects of the phenomenon under study, while they simultaneously exclude other aspects. This accentuates the importance of method pluralism, and the need to remain open to different combinations of methods when approaching complex phenomena such as resistance.

This leads us to a key strength of resistance studies as a field. Drawing upon a variety of research fields and disciplines, including gender studies and feminism, peace studies, political science, sociology, critical race studies, anthropology, psychology, and critical legal studies, has benefitted the development of widespread method pluralism in studies of resistance. Spanning methodological approaches such as discourse analysis, case studies, narrative analysis, action research, ethnographic studies and participatory observation, there is indeed a rich repertoire of tools available to resistance scholars. Yet it is undeniable that there exists a predominant bias towards qualitative studies in the field. There are important exceptions, like Chenoweth and Stephan's (2011) highly influential study of the conditions under which civil resistance succeeds or fails, but nonetheless the field is dominated by qualitative approaches.

[1] But like most allegories, this one has its limitations. Resistance does not draw from an infinite source, nor is it so structurally determined that it rises automatically in response to structural conditions, but always emerges from actors and their agency.

In fact, all submissions to this special issue were qualitative or conceptual studies and a cursory review of the previous issues of Journal of Resistance Studies shows a strong bias towards qualitative and theoretical studies, with not a single quantitative paper.

On the one hand, this is not very surprisingly. Traditionally, Resistance Studies has often focused on the more subtle, everyday forms of resistance, or the processes and practices occurring beneath the surface. The field was developed partly in response to the alleged overrepresentation within Social Movement Studies on explicit, organized forms of resistance (i.e. what's manifest on the surface), which arguably risks to neglect or exclude those resistance practices that are performed in secret, disguised as hidden transcripts or concealed as symbolic codes (Scott 1990). These less tangible practices often resist being captured by blunt instruments that focus on immediate, observable and easily measured phenomena. For instance, actions which may appear at first glance as blind obedience to authorities may conceal subtler forms of resistance practices that are invisible for those in power, and consequently also easy to miss by scholars far from the heat of the battle. This brings to mind the old Ethiopian proverb that James Scott quotes in the introduction to his book, Domination and the Arts of Resistance: "When the great lord passes the wise peasant bows deeply and silently farts". Indeed, we can hardly hear nor smell such subtle practices of defiance while reclining comfortably in our armchairs.

In her contribution to this special issue, Minoo Koefoed highlights these issues, emphasizing the strengths of ethnographic methods in capturing the "backstage" of resistance practices. She accentuates the necessity of contextual awareness in order to detect and interpret those subtle acts that may otherwise pass by unnoticed. While such careful, qualitative, in-depth studies are indeed crucial, Resistance Studies is also in need of broadening its perspectives, aiming for generalization and allowing the investigation of patterns across cases. Therefore, the paper by Brian Martin and Majken Sørensson is an interesting complement to the ethnographic approach, suggesting a broadening of the field by employing experiment-like methods to investigate the efficacy of non-violent strategies. Besides theoretical and scientific value, these more

rigorous approaches to assess and compare different types of resistance strategies could also be of great practical value for activists.

Another methodological possibility that follows the same logic as experiments, while avoiding some of the problems that Brian and Majken identify relating to e.g. ethical issues and costs, is systematic comparative studies. For instance, Qualitative Comparative Analysis (QCA) constitutes a particularly promising approach that builds upon experimental logic, but instead uses naturally occurring experiments. The basic procedure of QCA allows it to embrace causal complexity, i.e. the fact that whether a condition is causally relevant often depends on the presence or absence of other conditions. It also permits the investigation of situations when the outcome of interest can follow from different combinations of causal conditions (equifinality) and when similar conditions may lead to dissimilar outcomes (multifinality): conditions that are arguably very common when studying resistance (Ragin 2008). While QCA is less costly than regular experiments, and also associated with fewer ethical problems, it is however also less flexible since naturally occurring experiments do not allow us to tamper with variables. Nevertheless, both of these methodological approaches hold great promise to further develop the field of resistance studies, both theoretically and practically.

Finally, relating to the idea that our instruments and tools have a saying in both studies and practices of resistance, Otto von Busch elaborates in his paper on how a return to matter would affect the methodological aspects of Resistance Studies. As a field, Resistance Studies has for long been heavily inspired by the linguistic turn with its focus on language, thus largely neglecting the role of matter. Otto aims at (re)introducing a materialist methodology, by using a case of how consumer objects are transformed to interfere with consumer relationships to become tools for cultivating resistant capabilities. This evokes a number of relevant questions, such as: can we consider material things as co-resister, and what happens with methodology if we broaden the notion of agency to include material things?

Ethical Concerns in Resistance Studies

A central theme that runs through many of the papers in this issue is that of ethics. As several of the authors point out, questions of methodology are always closely and inevitably related to ethical concerns. As researchers, we observe, participate, engage and contribute—thus shaping the very objects that we study. Like the river, our objects of study undergo constant change not only as we are studying them, but also *because* we are studying them. This includes, of course, practices in the actual field of research, as scholars using e.g. action research and participant observations often actively and explicitly aim to be part of what they are studying. Similarly, the concrete results of our research may either help activists or, at worst, hinder practices of resistance.

However, this aspect of change also occurs on a deeper, epistemological level which has to do with a social reality that is highly complex, consisting of multiple entrenched, complex systems. This implies that when we approach a certain phenomenon we delineate it as an object of study based on certain perspectives and assumptions: we focus on certain parts of it while leaving out others. In this sense, science is never objective and external, but rather an inseparable part of the object of study (Bhaskar 1979). By implication, any empirical project is inevitably enmeshed with ethics and politics; by cutting off a certain phenomenon, we also frame it in a certain way.

While this applies to all types of social research, an interesting aspect of studying resistance is that it evokes some unique ethical challenges and dimensions not likely to be an issue in other strands of research. Often students of resistance are driven not only by a desire to accumulate abstract knowledge, but also that the knowledge generated actually come to practical use: to empower communities in resistance or in various ways sharpen the tools available to resisters. As a result, it is not necessarily the case that the same ethical guidelines apply for resistance studies as for other fields of the social sciences.

For instance, despite our noble intentions, there is always the risk that the results of our research can be used to suppress resistance. To accentuate and draw attention to resistance practices obviously poses a potential risk for the resisters, and revealing the practices themselves also

risks rendering them less effective or even useless. While this may not have constituted any serious problems for the peasants in James Scott's (1990, 2008, 2009) historical studies on everyday resistance—simply because his subjects were not alive during the course of investigation—it does pose more serious problems for studies of contemporary forms of resistance, and may even have a decisive impact on the potential for, and outcome of, resistance. These challenges are of course not exclusive to studies on clandestine forms of resistance, but apply equally to overt forms of mobilizations and tactics employed by activists and social movements. There is always a risk that insights generated from studying these resistance acts could be used by those in power to develop even more effective counter-measures. How should resistance scholars deal with these issues: do we perhaps need our own version of the Hippocratic Oath?

This special issue includes several interesting pieces that discuss various aspects of these questions. In order to encourage a dialogue on these important issues, I have chosen to open the issue for extensive comments by including shorter papers that discuss particular ethical issues that researchers have encountered in their own research.

Drawing upon fieldwork amongst resistance activists in Western Sahara, Joanna Allan discusses how studies on resistance may involve unique ethical challenges. More specifically, she raises four ethical dilemmas in relation to Resistance Studies, namely *participant risks, state permissions and lying to authorities, personal risk and privilege*, and *anonymity*, and shows that sometimes the most ethical thing to do actually contravene some of the traditional plinths of academic ethical frameworks. This requires that the researcher is prepared to actively contribute to the resistance struggle that she studies.

In her piece, Massimiliana Urbano looks at how ethic review boards and their principlist approach to ethics guidelines may constitute possible methodological impediments for participatory action research, thus risking silencing critical and socially engaged research. She argues for more flexible guidelines that depend on the purpose and context of the particular study.

Minoo Koefoed discusses how to deal with situations that may emerge when we engage in participant observation in resistance movements with

armed branches. In this thought-provoking piece, Minoo draws from her own experience of participant observation with the Kurdish movement in Turkey's southeast, when she was confronted with the dilemma of whether to observe, and even participate in, a weapon production workshop. This evokes relevant questions concerning how we should deal with situations when our ethical guidelines collide with methodological considerations. Where do we draw the line between gaining access to unique empirical material, while at the same time risking contributing to legitimizing illegal and/or immoral practices?

Drawing from her experience of fieldwork of urban activists in Malmö, Sweden, Christina Hansen highlights in her piece an issue that many of us may recognize, namely the potential tension and difficult balance between being both an activist and a researcher. How do we balance between being a "useful activist" and "useful researcher"? How should we deal with questions such as informed consent when we are shifting between these different roles? What are the advantages and challenges of having an "insider position", in the sense of sharing ideological sympathies with our research participants?

Clearly, there are no easy answers to these questions, but the contributors in this issue raise pertinent points of which we as scholars must be aware and take into consideration when researching resistance. Perhaps a general conclusion from these discussions is that we should approach ethical concerns more as broad and open questions, rather than as strict ethical rules. Instead of taking a Hippocratic Oath, therefore, perhaps the field of Resistance Studies is more well-suited to a Socratic debate, continuously engaging with difficult questions and embracing the frequent lack of clear-cut answers.[2]

The Future of Resistance Studies: Resistance in the Digital Era

While reviewing the submissions for this special issue, I noticed that none made any predictions for the future of Resistance Studies. This is probably because the discipline favors explaining and understanding what happened and why, rather than forecasting trends. That said, one

[2] Thanks to Sarah Freeman-Woolpert for suggesting this metaphor.

of the privileges of writing an editorial is the possibility to speculate on the future for Resistance Studies, in this case particularly in relation to methodological issues.

So far, we have established that the structural context or socio-material landscape has a decisive impact on resistance, and that power and resistance thus exist and co-evolve in a complex and intricate relation. With this background, in recent decades we have seen a dramatic change in the socio-material landscape as social interactions and everyday forms of communication are increasingly moved online. This fundamental process of digitalization has brought with it changes in the means of domination and suppression, but has also given rise to new, emerging resistance practices.

Hence, while technology has undeniably created new possibilities for surveillance and controlling a population[3] by relaying regime propaganda, monitoring dissidents, infiltrating networks and tracing dissidents for spreading regime-critical posts on social media, there is no doubt that digitalization also has enabled new forms of resistance, thereby forming and reshaping resistance in and of itself. Based on this, I believe we may distinguish between two main changes in contemporary resistance practices: changes in the repertoires of contention and new spaces of contention.

Repertoire of contention

In a now-classic study, the historian Charles Tilly (1986) discussed the relation between resistance practices and the established political regime. Tilly introduced the notion of a repertoire of contention, defined as [i] the set of tactics available at a given historical moment and [ii] the common characteristic or logic shared by these tactics. The basic idea is that activists do not exist outside their historical context and cannot freely choose from an infinite number of tactical options, but rather chose a tactic from a culturally and historically specific set: the repertoire of contention. This repertoire tends to change over time, depending on

[3] One example of this is mentioned by Minoo in this issue, namely how the Turkish surveillance system uses sensors that pick up phone signals and thereby enable them to detect and target resistance activities.

e.g. broader social and political context and power structures. In other words: different regimes foster different styles of protest.

Tilly distinguished between a traditional repertoire which was predominant in the 18th century and comprised various local forms of collective action, aimed directly at the perceived social problems. This includes tactics such as food riots, disruptions at festivals, appropriation of land and destruction of property. In the middle of 19th century the power structures became more centralized as the national state grew stronger, which led to the emergence of a modern repertoire of contention that focused on creating alliances and coalitions that could address these new power structures. Thus, the specific tactics became more modular and were adapted so that they could be transferred more easily from one setting to another, and includes e.g. boycotts, mass petitions, public meetings, strikes, and blockades.

In recent decades, we have seen an upswing of new forms of online-based tactics such as DDoS-attacks, e-blockades and hacktivism, but also various digitally-enabled forms of (offline) collective action, such as swarm mobs and network-based action (e.g. Bennett and Segerberg 2013, Earl and Kimport 2011). Interestingly, these tactics seem to differ from both the traditional and modern repertoire that is based to a large extent on physical co-presence and certain assumptions regarding the enduring nature of protest. In other words, people gathered in space and time, and activism tended to remain relatively stable over time. But with these emerging digital tactics, collective participation no longer requires co-presence in time and space: we can now participate online and from home, and physical togetherness varies between different tactics (Rolfe 2005). Furthermore, digitally-enabled collective action does not necessarily take the form of a long and continuous stream of contention; it is sometimes rapid and overwhelming but short-lived and sporadic, something which is illustrated in the recent viral and global mobilizations to denounce sexual assault and harassment using the hashtag #metoo. Are there reasons to assume that there is a fundamental change occurring in the underlying logic of contemporary collective action—are we observing the emergence of a new digital repertoire? What is the nature of these digital tactics and what potential do they carry in relation to social change? These are questions that clearly deserve more attention.

Spaces of contention

Besides these dramatic changes in the methods and means of resistance employed by protesters, it is clear that the spaces for social interaction also undergo important changes. Using terms such as *free spaces* (Evans 1979), *counter-publics* (Fraser 1990), *safe haven* (Hirsch 1993) and *safe spaces* (Gamson 1996), scholars have for long emphasized the central role physical spaces play in relation to resistance and collective mobilization by creating possibilities to develop both a repertoire of tactics and strategies, but also to foster oppositional consciousness. There are many examples of these kinds of spaces throughout history, including the black churches in civil right movements, union halls, student lounges, separatist women groups, and the working class cafes in the French revolution. These physical spaces thus often serve as clandestine embryos for mass mobilization and insurgency, offering a protective shelter against repression and the prevailing hegemonic ideologies in society but also serving as a hub for the diffusion and circulation of ideas and ideologies.

While physical spaces are undeniably still relevant in mobilization, much indicates that they are now moving to the electronic realm as their functions are increasingly realized through electronic networks, independent of physical space. Recent studies of contemporary revolutions and mobilizations such as the so-called Arab spring clearly indicate that social media often plays a significant, but not undisputed, role in revolutionary processes, creating a space of freedom in a totalitarian context which would not otherwise exist (Howard et al. 2011, Mourtada and Salem 2011). This suggests that what constitutes the 'backstage' of resistance may thus be shifting, increasingly moving to the digital arena. Accordingly, Facebook groups and Internet forums may be the new cafeterias of the future revolution, with Twitter constituting the new speakers corner. If this is indeed the case, this brings certain challenges to the fore regarding how we as researchers should deal with these changes: are our traditional tools and methods of data collection and analysis sufficient, or are more fundamental changes required? In the latter case, what would a digital ethnography look like? This leads us to the next point.

New methods and means of studying resistance

Besides forming and changing resistance as a practice and an object of study, digitalization also contributes by shaping the means, methods and possibilities available for scholars to study these practices. Digitalization thus brings about both new possibilities as well as methodological challenges when it comes to researching resistance.

Increasing use of digital services has given social scientists unprecedented access to previously unimaginable data: traces of the lives, dreams, and feelings of hundreds of millions of people. What is interesting is that Internet and social media platforms provide a form of naturally-occurring longitudinal social data of a quality not previously imaginable, thus providing the opportunity for powerful new studies. We may now dissect wide-scale social change in detail and closely follow entire communities over time, tracing key actors, networks, groups and their interactions. In this sense, digital data provides a unique entrance to the discourses of everyday life: in words, songs, jokes and in the otherwise often impenetrable world of kitchen-table discussions. These new data sources open doors to arenas and fields of resistance previously understudied, including non-emancipatory mobilizations such as extreme-right resistance (Caiani, Della Porta, and Wagemann 2012). The lack of research on this topic can be explained both by the fact that scholars often focus on movements with which they themselves sympathize, but also in how the difficulties (and dangers) of gaining access to this field has led to a consistent lack of data. Interestingly, digitalization provides us with a possible entrance to this world and, in a sense, practical means to untangle the grassroots of the extreme right.

At the same time, these exciting possibilities for resistance studies also carry with them certain challenges that need to be addressed. Interested scholars have for long been limited by multiple methodological challenges, perhaps foremost relating to the sheer amount of unstructured and unruly textual data that often characterize social media. Thus even relatively small data sets can be difficult to approach as it is hard to delineate, select and confine materials consisting of millions of texts, posts or tweets. To make matters worse, these texts are often short, lack discursive context and spread in complex and highly non-linear ways, making them difficult

to extract and study using established methodological and analytical approaches.

Again, the way forward does not come from any singular, omnipotent methodological solution. There is no parochial method capable of embracing this type of data in its entirety. Rather, this further accentuates the necessity of an informed method-pluralism and openness to innovative combinations of methods in order to harvest the full potential of this data. Thus, we need to combine powerful techniques for automated text analysis developed in computer science such as Topic Modeling, Sentiment Analysis and Cluster Analysis, capable of organizing and categorizing large quantities of unstructured data and thus rendering a valuable overview or map of the content, with qualitative approaches that are more sensitive for uncovering those subtle linguistic nuances, coded strategies and symbolic meanings that often lie deeply embedded in texts. There is no doubt that Resistance Studies as a field has much to gain in being at the forefront of this methodological development, but also has much to contribute considering the rich experience of using qualitative methods to unmask and highlight hidden and less tangible social practices.

Conclusion

To wrap up, resistance is indeed a complex and dynamic phenomena that is constantly adapting to surrounding contexts and social structures. If we are interested in following these often unpredictable flows, as well as describing and explaining contemporary forms of resistance, we must consequently follow the arenas wherein these processes are played out. This also requires that Resistance Studies as a field must act as a pioneer when it comes to methodology.

To this end, this special issue aims to highlight the practice of researching resistance, which includes a range of both methodological and ethical questions that we must consider when doing research in our field. The various papers in this issue put focus on the tools we use; their advantages as well as their limits, and how they potentially also affect the very object that we are studying. This topic is important for maintaining a broad methodological competence in the field and avoiding the risk of adjusting and delimiting our research questions out of convenience

in accordance to the methods we like and feel comfortable with—thus risk ending up like the drunkard searching for his car keys under the streetlight, not because that is where he lost them, but because this is where the light is.

Due to the inherent complexity of our object of study, different tools and methods are needed to highlight different aspects of what we are studying: to capture both what happens on the surface, but also to understand the more covert processes occurring underneath. I believe such a method-pluralist endeavor is essential if we are interested in studying the interaction between these levels and the link between clandestine and small-scale forms of resistance and the processes of overt, organized mass-mobilizations. This schism cannot be solved through analytical means only; we need to study these processes empirically as they unfold.

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