

By Any Means Necessary? Ethnographic Access, Ethics and the  
Critical Researcher

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**ABSTRACT**

This paper aims to analyse the implications of negotiating ethnographic research access following research ethical codes and remain coherent with Critical Management Studies (CMS) principles. Through this reflective account, we seek to address the field of Organisation Studies (OS), where ethnographic research access has attracted little theoretical scholarly attention, and also to contribute to the renewed focus on ethical research practice within CMS literature. In addition, we also aim to contribute to broader debates about qualitative research practices by highlighting the ethical implications of establishing formal research access and to analyse the dilemmas that arise from the conflict between prescriptive ethical codes and researcher's own conscience when carrying out field research. Rather than calling for a new, revised code of ethics, we appeal for a more open and honest debate about the pragmatic realities of critical, organisational ethnographic research.

**INTRODUCTION**

Although discussions about research access have been present in qualitative research for some time (e.g. Brown et al, 1976; Gray, 1980; Feldman et al, 2002; Harrington, 2003; Crowley, 2007), in depth scholarly analysis on the negotiation of formal access<sup>23</sup> is barely present in many Organization Studies (OS) ethnographic accounts (Bruni, 2006b). Where present, it tends to be left 'behind the scenes' (Gellner & Hirsch, 2001), relegated to short appendices or prefaces (see Kunda, 1992). This is surprising as the process of negotiating formal access is known to be difficult, with famous anthropologists such as Boas and Malinowski having failed to get

access at points during their careers (Morrill et al, 1999). Access is a concern in all types of field research (Johnson, 1975) and can be surrounded by particular difficulties in research involving work organisations, where its negotiation can be very intricate due to the unwillingness of many institutions to open their doors and their "secrets" to outside scrutiny (Smith, 1997, 2000; Bryman, 1988; Buchanan et al, 1988; Gellner & Hirsch, 2001, Alvesson & Deetz, 2000; Bruni, 2006b). Gatekeepers may be concerned that research reports could expose company practices to the wider public or be used in legal proceedings against the company (Smith, 2001: 226). At the same time they may not perceive any benefit in taking part in in-depth, long-term research, given the demands of such research on organisational time. Problems of access seem to be particularly difficult for researchers following a critical perspective – "why should corporate managers allow a valuable resource – time – to be used against their own and maybe the company's interest?" (Alvesson & Deetz, 2000: 193).

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<sup>23</sup> We use the term formal research access to refer to the possibility of entering a setting to carry out research. This is often negotiated with formal gatekeepers such as CEOs, directors and managers. Although some prefer the notion of entry to designate the same process and use the term access in relation to access to information (Harrington, 2003), the term formal access seems more appropriated to OS as most literature in this area use this term.

Furthermore, taking its lead from medicine and health sociology, social science has increasingly concerned itself with the ethical defensibility of its research methodology and methods, leading to the development in the last 40 years of prescriptive codes of ethics intended to protect the rights of human subjects in research (Beauchamp et al, 1982). These codes, enshrined in the guiding principles of institutional review boards (IRB) and independent ethical committees, have a major impact on the nature of research undertaken within universities and research institutes in the US (Wright, 2005; Rambo, 2007) and increasingly worldwide. The development and refinement of codes of ethics for social science has been welcomed by some as a sensible and helpful set of guidelines (e.g. Guillemin & Gillam, 2004; Murphy & Dingwall, 2001; Bell & Bryman, 2006; Connolly & Reid, 2007). Elsewhere, concerns have been raised regarding the impact of the enforcement of such codes by IRBs (e.g. Nelson, 2004; Gunsalus et al, 2007; Koro-Ljungberg et al, 2007; Tierney and Corwin, 2007).

Our aim in this paper is to analyse the ethical complexity of negotiating access to carry out CMS-oriented ethnographic research in work organisations, in the light of emergent codes of ethics for social scientific research. We seek to contribute to the CMS literature which until very recently (Ferdinand et al, 2008) had under-analysed the ethical aspect of its research practices (Brewis and Wray-Bliss, 2008). More broadly, we aim to raise a challenge to mainstream OS where formal ethnographic research access has attracted very little theoretical scholarly attention (Bruni, 2006b). In addition, we also aim to contribute to broader debates about qualitative research practices by highlighting the ethical implications associated with the practice of establishing formal research access. In a broad sense, we analyse and make explicit tensions between prescriptive ethical codes and researcher's own conscience in relation to access to the field.

To introduce our account, we first highlight the key principles underlining ethical codes in

social research and the increasing impact of research ethics upon social science and OS in particular. We then discuss the centrality of ethics to CMS and the particular challenges of ethnographic research in this tradition, and consider the limitations in the traditional treatment of ethnographic access in light of this. Drawing on the experiences of one of the authors as ethnographer in a newspaper printing site in the UK, we then discuss the practical/ethical dimensions of the struggle to gain and maintain research access while maintaining a clear ethical direction in line with the ethnographer's critical commitments. We conclude with some reflections on the usefulness of codes of ethics in providing guidelines in critical organisational research and in social scientific research more broadly. Rather than calling for a new, revised code of ethics, we appeal for a more open and honest debate about the pragmatic realities of critical, organisational ethnographic research.

### **Research Ethics and the Social Sciences**

In an attempt to deal with ethical concerns since the horrors of experiments conducted by Nazi doctors during World War 2, professional bodies, universities and sponsor agencies have developed codes of ethical conduct, building principally on the Nuremberg Code, the Declaration of Helsinki and in the United States on the Belmont Principles. The Nuremberg Code was established in 1947 as a direct response to the atrocities of Nazi doctors' and represented an attempt to formulate general and basic standards for human experimentation (see Childress, 2000). The Declaration of Helsinki, developed and adopted in 1964 by the World Medical Association, tried to establish a better balance between research subject's interest and the need for scientific investigation which was undermined by the Nuremberg Code (Bell & Bryman, 2006). The Belmont principles (i.e. respect for persons, beneficence and justice) provide the philosophical underpinning for US federal laws that govern research involving human subjects. It also has strong influence on IRB regulations in US universities (see Ilgen et al, 2003). The roots of ethical

concerns in research can therefore be seen to originate in medical and health sciences and were only more recently incorporated by social research<sup>24</sup>.

While codes of ethics have had a presence in social sciences for some time, their application to OS in the US and Europe is an recent phenomenon (Bell & Bryman, 2006). Most ethical codes and debates in social research tend to focus on 3 broad principles: *informed consent*, *the right to privacy and confidentiality*, and *protection from harm* (see Van Maanen, 1983; Punch, 1986; Taylor, 1987; Cassell & Jacobs, 1987; Fontana & Frey, 1994).

The first of these, *informed consent*, was a key concern of the Nuremburg code, and requires research subjects to be accurately informed about the research so that they may make a clear and conscious choice about whether or not they wish to take part (Beauchamp et al, 1982; Hammersley & Atkinson, 1995; Davies, 1999). It is usually argued that exceptions to that principle, such as in the case of covert research, may only be justified where the sensitive nature of the research focus (i.e. criminal or covert activities) would otherwise preclude effective investigation<sup>25</sup> (Fine, 1993; Punch, 1994; Adler & Adler, 1994; Calvey, 2000). *The right to privacy and confidentiality*<sup>26</sup> requires that people's identities and research settings must have their privacy protected during and after the study (Punch, 1994; Adler & Adler, 1994), and that confidentiality must be guaranteed to subjects, groups and/or organisations under scrutiny (Bell & Bryman, 2006; Fetterman, 1989). *Protection from harm* relates to any damage that a research subject or setting may suffer as a consequence of taking part on the research (Kelman, 1982; Hammersley & Atkinson,

1995; Vanderstaay, 2005). Although physical harm is not a common consequence in ethnographies, other forms of harm can occur once the research findings are published. Even when pseudonyms are used, personal and organisational reputations can be undermined (Hammersley & Atkinson, 1995, Punch, 1994).

In the US, where IRBs hold significant influence, but also increasingly in Europe and elsewhere, compliance with these three principles is frequently obligatory for the institutional approval of a research proposal. More generally, though, these principles, specially when deployed by IRBs, tend to assume that they are unproblematic, common-sense, and essentially 'good' rules, that must be accepted and followed by the vast majority of researchers as vital to guarantee respect towards research subjects, which can and should be implemented unproblematically by an effective and conscientious researcher, their application is depicted as straightforward (see Fetterman, 1989; Silverman, 1999; Gill & Johnson, 2002; Bell & Bryman, 2006, to name but a few) regardless of the epistemological position of the researcher, and where ethical dilemmas arise in the field, such principles are intended to offer an appropriate solution (see Taylor, 1987; Vanderstaay, 2005). Codes of conduct have thus been defended as desirable to all organisational researchers, including CMS inspired scholars (Bell & Bryman, 2006); a position we intend to interrogate in this paper. In this way, such research ethical principles are grounded on a rather essential universalistic and prescriptive view of moral and, as such, they are increasingly considered "as universal 'benchmarks' of ethical behaviour" (Cannella & Lincoln, 2007: 316). A consequence of this is that they may be hegemonically imposed on the researcher reducing her/his autonomy and responsibility (cf. Koro-Ljungberg et al, 2007).

While ethics, broadly defined, is likely to have some relevance to all fields of OS, it may be argued that certain epistemological traditions in OS are more concerned with ethical issues than others (see Parker, 1999; Adler, 2002a; Adler, Forbes & Willmott, 2007). In particular critical researchers in OS have developed an epistemological position that constitutes an

<sup>24</sup> For an overview on the origins of ethical concerns in qualitative research, see Beauchamp et al (1982) and Punch (1994).

<sup>25</sup> This has fuelled debates around its validity as a research strategy. For an overview on those debates, see Punch (1994); Adler & Adler (1994); Hammersley & Atkinson (1995); Davies (1999).

<sup>26</sup> Confidentiality, privacy and assurances of anonymity are overlapping issues (see Davies, 1999)

essentially ethical endeavour, as we will discuss in the next section.

### **CMS, Ethics and Power**

While ethical questions are implicitly of relevance to all branches of social science, some sense of moral challenge to the societal *status quo* is unquestionably central to the emergence of critical thought about organisations, ranging from anarchists (e.g. Mikhail Bakunin and Pierre-Joseph Proudhon), utopian socialists (e.g. Henry de Saint-Simon, Robert Owen) and communists (e.g. Karl Marx, Friedrich Engels). In the past 40 years, critical analysis in OS has developed as a distinct research tradition, first through mainly Marxist perspectives (e.g. Braverman, 1974; Marglin, 1974; Burawoy, 1979) and more recently incorporating post-modernist thought (e.g. Cooper & Burrell, 1988). In this context, Critical Management Studies has emerged over the last 15 years<sup>27</sup> as a movement that attempts to encompass different critical traditions in OS. As a consequence, CMS research is far from a unified and coherent body of knowledge due to the diversity of epistemological traditions it draws upon, such as different forms of Marxism and post-Marxism (Thompson, 1989), Critical Theory (Alvesson & Willmott, 1996), critical realism (Fleetwood & Ackroyd, 2004), post-structuralism (Calás & Smircich, 1997), feminist perspectives (Ashcraft & Mumby, 2004), post-colonialism (Prasad, 2003); environmentalism (Forbes & Jermier, 2002), and Foucauldian studies (McKinlay & Starkey, 1998), to mention but a few. As most of those traditions follow different epistemological stances it is no surprise that, in Adler's words, 'too few of us (in CMS) would ever be able to agree on anything much' (Adler, 2002, p. 388). As a consequence, internal debates have been taking place regarding the nature of critique in CMS (e.g. Boje et al, 2001; Calás & Smircich, 2002), whether CMS aims to

produce more "humane" and ethical management practices or is opposed to the institution of management altogether (e.g. Parker, 2002; Clegg et al, 2006; Willmott, 2006; Adler, Forbes & Willmott, 2007), the potential exclusion of other critical voices by CMS (see Bhom & Spoelstra, 2004; Ackroyd, 2004; Wray-Bliss, 2004) and structuralist and post-structuralist positions on issues of power in the workplace (see Parker, 1999; Willmott & Knights, 1989; Thompson & Ackroyd, 1995). Despite this ongoing debate, it has been argued that there are also unifying characteristics common to most or all CMS positions (Fournier & Grey, 2000; Adler, Forbes & Willmott, 2007). Parker (2002) argues that when someone claims to do critical work in OS, she/he is saying something about her/his political identity (that it is broadly left-wing/liberal) and is expressing distrust for conventional positivist methodology. Similarly, Fournier and Grey (2000) advocate that critical research in OS organises itself around three core propositions: *non-performativity* (being unconcerned with the development of knowledge aimed to increase organisational efficiency and not seeing management as a "desirable given"); the *de-naturalisation* of what is usually taken for granted (e.g. hierarchy, profit, efficiency) and *reflexivity*, the commitment to interrogate one's own research claims.

Fundamentally, then, CMS does not find mainstream management to be either "intellectually coherent and/or ethically defensible" (Willmott, 1995: 36). Its 'mission, therefore, is to challenge the oppressive character of management and organisation (Alvesson & Willmott, 1992; Adler, 2002); to maintain a critical stance towards instrumental reason (Alvesson & Willmott, 1996); to oppose dominant power, ideology, managerial privilege, and hierarchy; and to analyse relations between power and knowledge, especially showing how forms of knowledge that appear to be neutral reinforce asymmetrical relations of power (Adler, Forbes & Willmott, 2007; McKinlay & Starkey, 1998). In this sense, critical approaches to OS are strongly linked to some conception of ethics; not only because it is largely motivated from an ethical position but

<sup>27</sup> For an analysis of the development of CMS see Fournier & Grey, 2002; Grey & Willmott, 2005; Parker, 2002; Adler, Forbes & Willmott, 2007

also because the possibility to name the behaviour of others as problematic (Collins & Wray-Bliss, 2005) is the main condition of possibility for critical research (Latour, 2005). As a result when critical research makes assertions about the oppressive or exploitative character of managerial or organisational practices, an implicit or explicit ethical judgment is made<sup>28</sup>.

Thus analysing issues of power tends to be a central topic in CMS-oriented research. Given the movement's epistemological diversity, power can be theorized in distinctive and sometimes conflicting ways within CMS research<sup>29</sup>. However, a dominant theme in recent CMS work draws on a Foucauldian notion of power to focus on how power relations are constituted in specific organisational settings (e.g.: Willmott & Knights, 1989; Townley, 1994; McKinlay & Starkey, 1998; Hodgson, 2002). Foucault (1975 and 2000) largely rejects the association of power with repression and constraint and instead describes power relations as polyvalent, capillary, strategic and productive, enabling certain possibilities while rendering others more difficult. In Foucault's own words, "the exercise of power is a 'conduct of conducts' and a management of possibilities" (Foucault, 2000: 341). This is the notion of power adopted in this paper, particularly when considering the researcher's location and her/his constitution within, through and in furtherance of particular relations of power.

As critical perspectives in OS typically rely on ethnography as a research strategy (see: Roy, 1952; Beynon, 1975; Burawoy, 1979; Kondo, 1990, Kunda, 1992), the next section will explore what may constitute a CMS inspired ethnography.

### Ethnography and CMS

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<sup>28</sup> This claim is itself is a contentious issue; see Clegg et al., 2006, Collins and Wray-Bliss, 2005.

<sup>29</sup> For an overview on different possibilities of theorizing power following a critical stance, see Clegg (1989) and Clegg, Courpasson & Phillips (2006).

Ethnography can be defined in different ways: as a particular kind of fieldwork activity, as an intellectual paradigm or as a narrative style (Bate, 1997). It "yields empirical data about the lives of people in a specific situation" (Spradley, 1979: 13) and involves "the ethnographer participating, overtly or covertly, in people's activities for an extended period of time, watching what happens, listening to what is said, asking questions" (Hammersley & Atkinson, 1995:1). Pioneering ethnographic research in OS followed realist wisdom (Marcus & Cushman, 1982), based on the assumption that reality exists "out there" and that the role of the ethnographer is to preserve a non-intrusive presence in the field, acting as a neutral observer (Sanday, 1979; Marcus & Cushman, 1982; Van Maanen, 1988). Later, this work was supplemented but not supplanted by ethnography drawing on symbolic interactionism (Pondy et al, 1983; Gagliardi, 1990), in which the interpreter has a more explicitly active role, as an authorial voice in translating and transforming discourses into written texts, and it is argued typically privileging her/his experience over the native's. In such work, heterogeneous elements are usually suppressed given room to an integrated portrait of institutional foreground against a coherent cultural background (Jeffcutt, 1994; Linstead, 1993).

From the 1980s onwards, post-modern inspired critiques stormed ethnography, challenging the totalising gaze of the ethnographer, her/his ability to impose interpretation and thus how the "native" was represented in ethnographic accounts. Such critiques have undermined the researcher's ability and ethical 'right' to create textual order via the suppression of dissonant voices. In place of absolute and authoritative accounts, it is argued that knowledge generated via ethnography must be an enactment of multiple voices and realities (see Marcus & Cushman, 1982; Clifford & Marcus, 1986; Marcus & Fischer, 1986; Clifford, 1988; Marcus, 1994), and should draw attention to issues of text, language and authorship in ethnography (Van Maanen, 1995; Marcus, 1997; Atkinson et al, 2001). The post-modern challenges have influenced not only anthropology (see Marcus, 1997) and the concerns of critical ethnography

(see Thomas, 1993; Marcus, 1999) but also OS (see Jeffcutt, 1994; Linstead, 1993; Watson, 2000; Banerjee & Linstead, 2004; Bruni, 2005 among others).

Such tendencies have had major implications for critical perspectives in OS, given their traditional reliance upon reflexive, qualitative methodologies such as ethnography (e.g. Beynon, 1975; Burawoy, 1979; Leidner, 1983; Linstead, 1985; Kondo, 1990). Due to the epistemological diversity of CMS-inspired research, it is impossible to provide a clear cut and generic definition of what constitutes critical ethnography in OS. However, common characteristics one would associate with CMS-inspired ethnographic research may include exploring the ongoing performance of power relations, regimes of truth, domination and resistance; describing and analyzing hidden issues, agendas and assumptions; a scepticism towards "value free" facts; a concern with reflexivity; a sensitivity to the political concerns underpinning research; and a preoccupation with deprived and powerless groups; and, therefore, a focus on the possibility of social change (see Thomas, 1993; Jordan & Yeomas, 1995; Marcus, 1999; Foley, 2002; Forester, 2003).

### **Practicalities of the Trade: Ethnography and Fieldwork Access in Organisations**

Ethnography has an important and distinct presence in Organisation Studies (OS), where it has been vital to developing a deeper understanding about the world of management, organisations and work (Van Maanen, 1979; Rosen, 1991; Bate, 1997; Smith, 2000). The uses of ethnography as a research strategy in OS have led to ongoing epistemological debates about representation, language and truth claims (Rosen, 1991; Jeffcutt, 1994; Linstead, 1993; Jones, 2000) and to an extent, concerns with ethical debates around ethnography. Less frequent, however, are academic debates associated with ethnographic research practice. Indeed, many writers have divided ethnography into different phases (Van

Maanen, 1995; Denzin, 1997; Bryman, 2001), One consequence of this has been to focus attention upon the reflexive ethnographic moments (such as analysing empirical material, or writing ethnographic accounts), where ontological, epistemological and ethical dilemmas arise and need to be properly addressed. This enhanced focus is largely to the detriment of the practical ethnographic moments, which are seen as theoretically unproblematic and technical, to be dealt with managerially and pragmatically (see Fetterman, 1989; Van Maanen, 1995; Bryman, 2001). For instance, although writing fieldnotes has attracted attention in ethnographic research, it tends to be treated as a practicality about which experienced scholars can advise novice researchers (see Emerson et al, 1995), and even post-modern inspired critiques have not challenged or questioned those practicalities (Van Maanen, 1995; Marcus, 1997). In such moments, by implication, it may be argued that following a clear ethical code is sufficient to deal with ethical dilemmas in the practical moments of ethnography, as ontological and epistemological issues are not at stake.

As an example of a practical step in ethnography, some research textbooks have tried to provide some insights into dealing with the access problem (Bryman, 1988) by offering advice on strategies intended to secure access. Examples of such strategies are: *forms of impression management* (Johnson, 1975; Agar, 1980; Fetterman, 1989; Silverman, 1999; Hammersley & Atkinson, 1995; Feldman et al 2002), *obtaining bottom-up access* (Silverman, 1999), *being non-judgemental* (Silverman, 1999; Hammersley & Atkinson, 1995), *establishing a contract* (Silverman, 1999), *using researcher's personal and institutional networks* (Agar, 1980; Bryman, 1988; Hammersley & Atkinson, 1995; Gill & Johnson, 2002); *minor forms of deception* (Johnson, 1975; Hammersley & Atkinson, 1995; Alvesson & Deetz, 2000), *gaining access progressively* (Johnson, 1975), *developing and nurturing relationships with important actors* (Bryman, 1988; Fetterman, 1989; Feldman et al, 2002); *the effective management of gatekeepers* (Morrill et al, 1999); *eliciting the sponsorship of*

*a senior scholar to get access; becoming a change agent* (Gummesson, 2000) and *undertaking covert research* (Alvesson & Deetz, 2000). Moreover, to have some sort of reciprocity from the researcher to the organisation studied (e.g. offering feedback sections, training, etc) is not only presented as an access strategy, but also as a good practice (Brown, et al, 1976; Bryman, 1988; Ram, 2000; Gill & Johnson, 2002; Hammersley & Atkinson, 1995; Silverman, 1999) or even as a reciprocal ethical obligation (Bell & Bryman, 2006). Once access is granted, the problem is converted into an issue of 'managing' the fieldwork process and relations (Silverman, 1999; Hammersley & Atkinson, 1995; Gill & Johnson, 2002; Feldman et al, 2002). Even an entrepreneurial approach has been advocated to address fieldwork contingencies (Ram, 2000). The pressures resulting from the perceived danger of losing formal access are rarely addressed explicitly. In this way, the consensus in general accounts about acquiring and keeping access is that the successful deployment of the correct set of strategies and management of certain aspects of the relationship by the researcher will eventually grant and maintain access. As a consequence, it is portrayed as a neutral and operational task, with little or no ethical consequence (beyond debates about the moral validity of employing covert research strategies e.g. Bulmer, 1982).

Portraying access in this manner reflects an assumption that the researcher has significant control over the field, attributing too much agency to the researcher and too little to the researched. This reinforces the idea of research subjects under the control of the researcher (with the right managerial qualities) a notion that has significant ethical consequences for critically-inspired research (Wray-Bliss, 2003). This also often implies that organisations remain stable during and after the negotiation of access, depicting organisations as singular entities with a unified will (i.e. to allow or deny access). As discussed below, the ethnographer tends to be swiftly disabused of this misconception

faced with the realities of conducting research in any work organisation. Moreover, this kind of guidance is implicitly underlined by an instrumental rationality which also poses dilemmas for critical researchers intent upon challenging and critiquing this form of instrumental reason and action.

The intention below is to address this tendency by underlining struggles and ethical challenges faced by one of the authors in his attempts to gain and hold onto access for ethnographic research, and at the same time to maintain a clear ethical stance derived from his critical perspective, given the pragmatic complexity of a typical research encounter.

### **The Struggle for Formal Access: A Confession**

In February 2005, one of the authors of this paper<sup>30</sup> started negotiations to get formal access to carry out fieldwork within the offices of a British newspaper. My main research aim was to conduct an extended critical ethnography looking at the impact of organisational change on individuals working in an industry in decline, the newspaper industry (Meyer, 2004). Attempts to get research access involved directly three distinct but interconnected organisations: RedPaper<sup>31</sup>, FailCo and OneCo. RedPaper is a regional newspaper that was moving production from one printing site (FailCo) to another (OneCo). Although I first gained agreement to conduct research at RedPaper, I eventually ended up conducting ethnography at OneCo eight months after I started negotiating access. I conducted this ethnography while 4 out of the 9 OneCo presses were being replaced at a cost of £45 million, a cost shared by OneCo and RedPaper (to the great relief of OneCo as they were at this time under threat of closure due to overcapacity in the industry). Throughout this period of negotiation, I took detailed fieldnotes after every relevant event (e.g. meeting, phone call conversation, informal chat, etc.). The account

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<sup>30</sup> In keeping with the traditions of the confessional ethnographic tale (Van Maanen, 1988), the researcher will henceforth be referred to in the first person.

<sup>31</sup> The company names cannot be revealed.

of access negotiation below is drawn from these fieldnotes.

My attempts to gain formal access to conduct fieldwork began with two meetings with the editor of RedPaper in March, 2005. In these meetings, I explained my interest in conducting ethnography at RedPaper newsroom. The editor replied he saw no problem with this, asking that I should write a one page proposal for the approval of the RedPaper Managing Director (MD). Although I sent the requested proposal immediately, it was not until July 2005, after four months of almost daily (and increasingly desperate) telephone calls to the editor's Personal Assistant (PA), that I finally secured a meeting with the editor and the MD where access was granted. They also insisted that before I started, I should be given an overview of the various departments of RedPaper, and it was during this tour that I was taken by RedPaper's Production Director (PD) to visit the OneCo and FailCo printing sites.

In August 2005 I finally started my observation of activities in the RedPaper newsroom. However, after one week in the newsroom, I was asked to see the editor and the MD again. Although very friendly, they explained that there was a new Chief Executive Officer (CEO) at RedPaper who was proposing some deep changes in the organization that would create discomfort and they were not willing to have an outsider documenting this process<sup>32</sup>. To my deep disquiet, the editor stated his position;

"You can only do interviews. You will need to send all questions you will ask people in advance. I will select the questions you can ask and the people you can speak to. I will want to see all your interview transcripts. My lawyers will read your final report and you will need to sign a confidentiality agreement"

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<sup>32</sup> Seven months after this meeting, one in each three journalists and more than 30 administrative personnel were made redundant at RedPaper. They also changed their editorial structure.

Extremely worried, I replied I could not accept this due to methodological and ethical constraints - these new conditions of access made my research aim impracticable and I had no viable alternative subject organisation in this industry. The MD asked if I had any other ideas and I suggested that I might research the printing side of the business where other significant changes were taking place. They agreed to this and ended the meeting saying that the MD and I would meet on the next day to discuss details.

However, the next day never came. For another month, I kept in touch with the PD explaining and demonstrating my anxiety and visiting his department regularly under the pretext of making some initial observations. In this time I again phoned the MD's PA repeatedly without any reply from the MD himself. Finally, in September 2005, the RedPaper PD contacted me to say he had the 'all-clear' from the MD to provide research access at their contracted printing sites and that he was willing to help.

I then submitted a new proposal suggesting a 9-month research project analysing changes in the RedPaper hired printing facilities, covering FailCo and OneCo. The PD said he would arrange access, but made it clear that it would be very difficult at FailCo; as relations between RedPaper and FailCo were poor and "they might think you are spying for us". Things now moved very quickly; the PD confirmed I could not research FailCo but arranged a meeting with the MD of OneCo and advised me on what to say at this meeting. I felt he was clearly driving the research towards OneCo where the new presses were being installed. He suggested that to increase my chances of access at OneCo, I should offer training in change management to OneCo managers. I was unhappy at the prospect of delivering training, but decided to do whatever was necessary to get access as by now I couldn't afford any more delays.

Finally, by late September 2005 I had a meeting with the RedPaper PD, the OneCo MD and the OneCo Senior Production Manager (SPM). It took no more than 15 minutes. After seeing my proposal, the MD assured I could stay there for as long as I wanted and that everything would



be open to me because his company had “nothing to hide”. He asked me to make two presentations about my research before I could start, one to trade union representatives and another to OneCo managers, to address concerns about my presence, to underline my independence and to show that there was no hidden managerial agenda behind my daily observations. No mention was made about offering training to OneCo managers. Also, I would be allowed to use the data gathered for academic purposes, provided that I agreed to protect the anonymity of the company and of individuals and to give a feedback session presenting my research findings. I saw no ethical issues at this stage as was confident I had considered the necessary ethical safeguards while negotiating formal access. However, as I left the access meeting extremely happy, the RedPaper PD said “it will be very good to have you here...You will be my eyes and ears in this project - you will be our man on the ground”. I was deeply unhappy about his remarks, but I decided at this point to keep quiet. My intention was to see how things would develop, in the belief that anything I said at this point could only endanger the precarious research access I had barely established, and with the intention of dealing with this situation as and when it arose.

One week later, I met the trade union representatives. During this meeting, the MD made it entirely clear that this was a process of communication rather than consultation, and that the research would take place regardless of the representatives’ reaction. Once I finished explaining how I would work, the SPM said rather aggressively: ““This is to shut you up and show that we are not afraid of having an outsider observing what we do. We have f\*\*king nothing to hide”. In the meeting with OneCo managers, the MD made it clear that helping my research was agreed between RedPaper and OneCo, that again this was a process of one-way communication and that all managers should provide whatever information I required. The SPM firmly emphasised that I had complete access. In both meetings I stressed very

clearly that all information I gathered would be confidential, used solely for academic purposes and no names would be disclosed to anybody under any circumstances.

At this point, then, formal access may be seen to be secured, information provided and organisational consent gained, although of course, as is widely recognised, this process continues throughout the research project. The next section will deal with the specific requirements of the three ethical principles cited above: *informed consent*, *privacy* and *confidentiality rights*, and *protection from harm*, in light of the ongoing process of access negotiation. A key focus is the close link between formal access and ethical concerns as well as the problems involved in following ethical guidance for social research.

### Access and Ethics in Practice

The difficulties associated with informed consent in ethnographic research are well known (e.g. Punch, 1994; Fontana & Frey, 1994; Adler & Adler, 1994; Hammersley & Atkinson, 1995; Davies, 1999), and the notion of consent proved very problematic in this research. I was introduced to OneCo by RedPaper whose investment was securing OneCo’s future and which was also owner of two presses being commissioned at the printing site. Later, while in the field, OneCo senior managers confirmed to me that I was only allowed to stay there so as to keep OneCo’s good relationship with RedPaper. Once formal access was granted by the OneCo MD, this left little leeway for other parts of OneCo to refuse consent, as shown above in the meetings with trade union representatives and OneCo managers - a command had been issued by the MD and had to be followed. I felt rather uncomfortable taking advantage of established hierarchical structures of control, the selfsame structures that my CMS-oriented research aimed to critique; overall, this seemed an inauspicious way to start the study.

With this in mind, I was very concerned to secure informed consent from individuals as the research progressed. In practice, this proved very difficult to achieve in any meaningful way;

securing informed consent from 35 people on a construction site, or from 10 busy managers at the outset of each meeting, posed a range of difficulties. After few weeks in the field, a customary response to requests for consent was “F\*ck off mate, you always ask this sh\*t. Of course I agree, pal”. When I attempted on one occasion to ask the same question to everyone present in a meeting, I was politely told to shut up. Thus specific conditions, both in terms of how organisational access was initially granted and in terms of practical realities of the field, made informed consent a much less meaningful concept. It also highlights the tension between what personal judgements of appropriate behaviour and the ethical principles I am supposed to sponsor.

In terms of privacy and confidentiality rights the situation was no more straightforward. By assuring formal access with total openness, in theory the MD undermined any possibility of preserving individual privacy from the researcher’s scrutiny, at least on work-related issues. When I asked questions about particular situations or individuals, people had total discretion on what to say, but in practice they very rarely chose not to answer. The extent to which this was in any sense a free choice is clearly debatable. Similarly, confidentiality was complex given the role of the RedPaper PD as gatekeeper. Given his comments about my role as “his eyes and ears, his man on the ground”, he clearly assumed that by granting me access, I would provide him with insider information about OneCo issues. On the one hand, I strongly felt that by doing so I may be breaching OneCo confidentiality by releasing any OneCo information to a third party (indeed, one of their key customers and investors, RedPaper). However, the PD position was not a clear one; although not employed by OneCo, he had an office within OneCo and sat on the OneCo executive board responsible for the installation of the new machinery.

This situation was clearly very delicate, as the PD and I developed a level of trust in our personal relationship. On several occasions,

he disclosed very sensitive information about RedPaper and continued as my supportive sponsor for securing wider access within the organisation. As a consequence, I felt that I owed him something. While I was conducting my fieldwork we had two meetings at RedPaper’s headquarters where he asked for what I considered private information about OneCo. On each occasion, I underlined my commitments to confidentiality and the need to follow strict research ethical guidelines. His response was; “Come on, mate. Life is about trade-offs. Your research has to be good for all of us”. At the time of the first meeting, I had seen nothing that could be considered any kind of threat to RedPaper’s interests. However, as my research progressed, numerous issues emerged; for example, it became clear that some OneCo managers were deliberately allocating some expenses to the installation project budget that were not part of the installation itself, with the consent of the OneCo MD. Following my conscience, I felt I could not disclose this to the newspaper PD – and at the same time, I felt very guilty *not* passing on this information to him, given his support.

Instead, during our meetings we talked about less sensitive OneCo issues, which could not occur without disclosing information I did not regard as confidential. So, although I made careful attempts to preserve OneCo’s confidentiality, there is nonetheless the possibility that he elicited from me information he would not be able to get otherwise. I considered asking the OneCo MD what kind of issues I could discuss with the RedPaper PD. However, this I felt would reinforce the impression that I was set up as a spy for RedPaper and would endanger my access, not least as the MD may not be aware of my meetings with the PD. Moreover, I felt that the OneCo MD was not entirely happy with my presence in his factory and this would provide justification for him to end my access. At the same time, as both companies were partners in a major capital investment, it seemed to me more likely that such a discussion with the OneCo MD would undermine trust between OneCo and RedPaper and would again be hard to justify both ethically and practically.

In relation to the ethical commitment to protection from harm, the situation again was challenging. While in the field, I routinely witnessed instances of sabotage, bullying and racism. Some forms of sabotage are particularly dangerous when a press is running at 80mph, not only disrupting production (perhaps not of central concern to a critical scholar) but also putting other individuals at risk. Racist comments were continuously addressed towards Asian workers and managers, and bullying was widely practiced. For example, I witnessed various acts of bullying from a manager who was at the time under investigation for bullying. I was asked in privacy by a senior manager and an HR officer if I had anything to mention regarding his case and I refused to make any comments on the grounds of the ethical guidelines underpinning my research – my standard response in similar situations. My rationale here was that reporting perpetrators of any problematic act would breach my confidentiality agreement (explicitly guaranteed to trade union representatives and managers in my first meetings) and could cause serious harm to the individuals concerned. I deliberated over this for some time, and despite the soundness of the action according to ethical research guidelines, I felt I was not doing the right thing. This was a paradoxical situation because to protect some people from harm I keep silent about people's attitudes and actions that were clearly harming others.

At the same time, it must be said that my concerns were not only ethical; there was also the instrumental need to keep the research going. I felt that suspicions that I may provide information to senior managers or to workers would undermine trust in me and destroy any possibility of gathering meaningful ethnographic data. For instance, revealing to workers instances when management manipulated internal selection processes, or lied to employees to encourage particular individuals to apply for voluntary redundancy would certainly put my access at risk. Despite feeling guilty for not exposing such practices, I choose to do whatever was

necessary to keep the research going. Thus, ironically, recourse to ethical guidelines allowed me to keep the research relations intact despite personal misgivings. This use of an ethical code to avoid making difficult moral decisions was particularly problematic in light of my critical research commitments, and my intention of highlighting ethical concerns with instrumental action in organisations.

While the section before has described my struggle to get formal access to carry out intensive fieldwork, this section has focused on the paradoxical situations encountered in attempting to apply ethical principles in the light of not-untypical organisational power relations associated with access. In the following section we will develop this discussion and reflect upon the space for ethical action and coherence for the critical researcher engaged in ethnography.

## **Discussions**

Gaining formal access to carry out this ethnography was complex due to the political fluidity of the situation encountered; supposed gatekeepers had their influence curtailed when a new CEO was appointed, and other gatekeepers were compelled to allow access as pressure was brought to bear by RedPaper upon OneCo. Contrary to the view of the researcher dealing with a mere practical difficulty (to be overcome by the use of the correct strategies and managerial skills), I felt deeply powerless and forced to exploit all of the limited possibilities available during the process of negotiating research access, including persistence - phoning up to the point of annoyance at times was my only possible influence on events. In addition, it was clear that organisational gatekeepers actively shaped the nature of access according to their own interests and agendas, with major implications for my fieldwork. In this way, as research access moved from a newsroom to a printing site, the kind of knowledge which could be generated also changed; a set of interviews with pre-selected questions and people in a newsroom creates different knowledge and implies different methodological and

epistemological assumptions compared to the ethnography conducted in the printing plant, even where the same research issues are pursued. Organisational power relations regarding formal access were continually shaping my research possibilities at the same time that the process of negotiating formal access posed very important questions about the research aims and objectives, the approach that was being followed, how data would be collected, and threw up considerable ethical dilemmas.

The set of conditions and power relations within the field associated with access also impacted how I deployed what seem to be very neutral and straightforward ethical principles in practice. During fieldwork, situations were much more complex and fluid than any code or principle could predict. The confessional account above illustrates how prescribed ethical codes when faced with contentious issues in practice can raise serious tensions for the researcher. When facing such situations, I was constantly striving for some balance between my own conscience and the need of keeping the research going; codes of research ethics became a resource to be deployed tactically in this process. In some situations, following general principles of research ethics often did not run counter to my interests and or personal morality (e.g. when refusing to act as a spy). However, following generic ethical principles in other occasions collided with my personal moral convictions (e.g. when I did not blow the whistle when faced with acts of racism and bullying). Indeed, in many situations ethical guidelines provided an excuse to withhold information in order to keep good field relations and maintain my research access, and provided a rationale for disregarding both personal moral misgivings and critical research commitments. This suggests that by highlighting the benefit of ethical codes for critical management research, Bell & Bryman (2006) disregard those consequences of its application that can run counter to vital CMS commitments.

In light of CMS main principles discussed before, how can a critical inspired researcher

remain silent after witnessing acts of bullying, harassment and racism, or where managers were clearly and deliberately misleading workers? It can be argued that the researcher is not silent because s/he will write academic papers (like this), give lectures, seminars, etc and by highlighting such activities, they will reduce the likelihood of such acts recurring (Taylor, 1987). However, by doing this the researcher will typically be communicating to people who may be aware of such situations and who can do nothing in the setting under investigation. Silence to conform to ethical guidelines (and to maintain research access) serves in many cases to allow ethically-problematic events to persist; an outcome hard to tally with core critically-oriented research commitments. Moreover, given the observed lack of impact of CMS outside of academic circles (Parker, 2002; Clegg et al, 2006), it is very unlikely that such research will do anything to prevent similar abuses from happening again.

Furthermore, all negotiations to get formal access to carry out this ethnography took place first with powerful actors who used autocratic practices to make this research happen. If it is assumed that inequalities, power mechanisms, exploitation, etc are not *a priori* given in the order of things, but are constantly enacted by diverse sets of practices (Thrift, 2005; Latour, 2005) this research may be said to reinforce unequal power relations and exclusionary practices from the moment of access negotiation. In this case, the main gatekeeper/sponsor was the representative of RedPaper's investment at OneCo. This investment made more than 65 employees redundant and was being used as an excuse to tighten management control over working practices. In this sense, the research also took advantage of a technological change programme that had the potential of creating exclusion, inequality and exacerbating unequal power relations. Even trying to resist roles attributed to him by powerful gatekeepers, the researcher fulfilled some management expectations and agendas by being instrumental to managers' ambitions (e.g. by being a potential 'mule' for the RedPaper PD, or by showing with his presence that the

company had 'nothing to hide') which pose extra concerns to a critical ethnographer. Much of the literature advocates that the researcher could (or indeed should) provide feedback or help to solve particular organisational problems in return for research access. To gain access, I was asked to feedback to senior managers my full research findings (which seemed almost attractive in comparison to the alternative of providing change management training). However, providing feedback to managers is often problematic to a critically-oriented scholar. On one hand, this practice is driven by a clear instrumental rationality assumption and is underlined by the idea of providing information primarily to improve company productivity. Moreover, such feedback sessions may create harm to people working for the company where problems relate to particular individuals, or where the feedback reveals gaps in management control regimes. Thus this process runs the risk of disclosing information that would not otherwise be available to senior managers and enabling them to tighten control and increase application of punishment mechanisms. On the other side, by hiding sensitive information from managers the researcher may not be making a true representation of research findings to managers, which is typically a condition of formal research access. It is also important to mention that feedback tends only to be provided to senior managers, securing their already privileged position and typically excluding other employees involved in the research.

Finally, it is possible to interrogate to what extent the application of common-sense social research ethical principles are in fact problematic, especially when associated with formal access to carry out critical ethnographic research. Clearly, I could have followed different paths by, for instances, making OneCo MD aware about my meetings with RedPaper PD, not offering feedback section solely to OneCo senior management (say, asking to have the trade union representatives included in such

sessions) or attempting a more inclusive or democratic means of access. The application of ethical guidelines and ways of getting formal access are always however framed by specific events and circumstances when different concerns are at stake - different individuals would quite likely take different actions under the same conditions. This means that ethical codes will always be open to individual interpretation, and their application will always be contingent. It is therefore very difficult to establish what are idiosyncratic practices, or to decide from an external position how the researcher should ideally have behaved, even in extreme cases (see Taylor, 1987; Punch, 1994; Vanderstaay, 2005). For this reason, the account given above is as frank as possible, so that such issues may be discussed openly.

Complicating this discussion, the ethics of the researcher in practice is strongly influenced by her/his own conscience, which can be in tension with ethical codes. As Taylor argues, "people who cannot deal with moral ambiguity probably should not do fieldwork because of the internal conflicts it imposes" (Taylor, 1987: 294). One could develop this critique further; some CMS-inspired research poses a challenge to essentialist and normative ethical views which underpin universal ethical codes (see Collins & Wray-Bliss, 2005; Willmott, 1998). One may further argue that, had current ethical codes associated with getting formal research access been enforced in the past, classical critical research (e.g. Roy, 1952; Dalton, 1979; Beynon, 1975) would never have been carried out. Here again, ethical guidance can have the perverse consequence of hiding ethically contentious issues, to not mention the real possibility that following or applying universalistic research ethical principles can actively have on undermining research freedom (Holland, 2007; Tierney & Corwin, 2007; Nelson, 2004), specially of critical nature (Lincoln & Tierney, 2004).

## **Conclusions**

We have argued above that all ethnographic stages or 'moments' have epistemological and ethical relevance, and have underlined this by

indicating the intertwined ethical and practical implications of getting and keeping formal access to do a CMS-oriented ethnography. Research access, far from being a technical issue or an 'hurdle' to be overcome at the outset (Brewis and Wray-Bliss, 2008), is constantly negotiated and re-negotiated and often constitutes a constant struggle, determining the kind of knowledge that can be generated by ethnographic research as it is interwoven within power relations and, therefore, continuously sets up the research conditions of possibilities.

The case under analysis indicates the difficulty/impossibility of simply applying widely-accepted ethical principles, given the reality of power relations in the field and the pragmatic requirements of maintaining access and completing the research project. Where departures from prescribed ethical practice are described above, these we hope are largely explained by the realities of academic work and studentship within work organisations, and arguably many other locations. The inevitable implication of the (ethnographic) researcher within these power relations calls into question the implementation of generic and universal ethical guidelines, given the necessarily situated nature of action and/or inaction in the field. The paper also suggests that getting access in ethnographic research raises more fundamental questions about a researcher's identity and his/her relation to the circumstances, environment and the 'subjects' of enquiry.

Moreover, a theme that has underpinned this paper throughout is the constant tension between codes of research ethics and the researcher's conscience. This is a very delicate relation as any code of conduct will always need to be judged by who applies it in practice and is facing the situation *in situ*. The blind advocacy of ethical codes can have the consequence of undermining researchers' possibilities of exerting discretion and, as a consequence, undermine research freedom. For critical researchers, and arguably for all researchers, the manner in which access is negotiated and maintained

reflects and forms the ethical aspect of the researcher in action, as s/he becomes implicated in the instrumental manipulation of research subjects and her/his conscience plays a very important role. To the extent that getting access and gathering data are regarded as merely practical research stages, there is the clear danger of naturalising problematic research practices, and shifting the researcher's ethical responsibility to abstract ethical guidelines. Such guidelines tend to impose a particular view of what is ethical in a normative way (cf. Willmott, 1998) and relieve researchers from the burden of following their own conscience and making their own ethical choices.

Our intention in this paper is not to call for the total rejection of ethical guidelines *per se*, or to suggest that the ethnographer, or the critical researcher constitutes in any sense a general exception to such guidelines. Indeed, it could be argued that similar challenges and ethical quandaries face all sorts of social researchers in the field, whether 'critically-oriented' or not. However, we would argue that there is a fundamental discrepancy between the ethical guidelines and codes of conduct espoused by OS researchers and the pragmatic realities of implementing these guidelines in fieldwork which the field tends to suppress<sup>33</sup>. There is, therefore, a pressing need to engage in a more open discussion of the ethical debates faced by the critically-inspired ethnographer, and social research more widely. This type of discussion may help on addressing the limitations of hegemonic discourses of research ethics and, as such, can help on thinking about alternative modes of engagement with research (cf. Koro-Ljunberg et al, 2007). In particular, this would demand that (critical) researchers constitute themselves through practices of resistance against the hegemonic stances of ethical codes and reflexively analyse their own actions. It would also require that researchers deliberately reflect on the type of moral and ethical research they desire to conduct (cf. Koro-Ljunberg et al, 2007: 1092).

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<sup>33</sup> With a few notable exceptions (in particular Van Maanen, 1983; Taylor, 1987 and Vandersteyn, 2005.)

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An important move in this direction would be to sponsor a “situated view of research ethics” (cf. Ferdinand et al, 2008) where the value and validity of the researcher’s own morality is recognised. A situated view of research ethics challenges normative and dogmatic views of ethics, and recognises, following Bauman (1993), that ‘situated dilemmas’ are “by their very nature neither reducible nor amenable to universal codified rules” (Ferdinand et al, 2008: 535). This approach therefore supports the development of research practices which are locally informed and where ethics is taken in its micro political dimension. Rejecting ‘descriptive’ and ‘normative’ ethics (Willmott, 1998), this approach has the advantage of not undermining the researcher’s capacity to actively exercise his/her own conscience to deal with ethical issues, but instead taking conscience as a fundamental aspect in the research encounter. It is therefore an essentially reflexive approach, which remains suspicious of the normalising tendency within explicit and formalised ethical guidelines (Brewis and Wray-Bliss, 2008).

The development of a situated and engaged research ethic is essential if we are to protect an ethically-defensible form of (critical) organisational research which does not rely on universalistic ethical principles. This would not mean that ethical injunctions will cease to exist, but an avoidance of codified and explicit rules will help in the creation of research practices that are more coherent with diverse research frameworks (critical or otherwise). This approach would also open space for the pursuit of vital critical research, which sometimes requires transgressing the boundaries of imported and inflexible ethical codes. More importantly, such an approach may help to combat the alienation of the researcher, enabling her/his own conscience to be put in the foreground rather than being left behind the scenes, suppressed or dislocated from the practices s/he engages in when undertaking research in the field.

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