CHAPTER 2

Participant Observation

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Participant observation provides a unique insider's view on global politics in the making. By enabling scholars to look behind the doors of international organizations (IOs), it can contribute to study how IOs produce documents, discourses, and artifacts; to grasp routine activities that shape decision making; to observe how power is exercised between IO members and different organizations; and to understand how IO staff navigate between daily constraints, informality, and hierarchy.

What?

Traditionally used in anthropology and sociology (Malinowski 1922; Whyte 1943), ethnography claims coherence and continuity between data collection and data interpretation by the same individual within a research endeavor insisting on "the crucial nature of manufacturing data" (Beaud and Weber 2010: 274). Among methods drawing on ethnography, participant observation is characterized by its participatory dimension, meaning that the researcher fulfills tasks specific to their assigned role. Concretely, it refers to the method through which the researcher generates data by not only being embedded but also actively participating in the activities under study while trying to embody the actors' lives to better understand them. Immersion provides the necessary material to produce thick descriptions to situate action in its context (Geertz 1973). In other words, participant observation helps explore and depict the reality such as it is experienced by the actors.

In political science and international relations, scholars have increasingly relied on participant observation to uncover hidden power relationships and reconstruct actors' strategies in accomplishing their daily activities (Burawoy et al. 1991; Schatz 2009). Scholars have used participant observation to study IOs through a variety of entry points like embedding themselves as interns within IOs' secretariats, joining a delegation during international negotiations, or integrating the "beneficiary communities" (Kimber 2020; Maertens 2016; Müller 2013).

Why?

On the one hand, participant observation provides an insider's perspective on the organization's functioning. First, researchers can reveal power asymmetries and configurations of multiple actors in constant renegotiation: they deconstruct a restrictive conception of an IO as a unitary actor by uncovering the diversity and complexity of actors' behaviors, strategies, and perceptions. For example, Bellier (2013) and Kimber (2023), who were both embedded as members of civil society delegations in charge of drafting proposals and tasks of coordination, enact this deconstruction: Bellier unravels the progressive recognition of collective actors in the production of international norms, while Kimber investigates inclusion and exclusion dynamics of civil society in intergovernmental negotiations toward the ratification of an international framework (2023). Likewise, hired as a research assistant at the United Nations (UN), Maertens captures the effects of the organization's hierarchy on its programs trapped between institutional collaboration and inevitable competition (2016). Fieldwork more broadly helps unpack the role of key individuals and relations of interdependence. Scholars may, for instance, investigate daily face-to-face interactions with what Nair describes as the "hanging out" technique, which proved useful in his study on the Association of Southeast Asian Nations (ASEAN) (2021).

Second, participant observation provides a unique understanding of everyday practices, bureaucratic constraints, and organizational cultures by requiring researchers to perform tasks and assume responsibilities through which they experience IOs on a daily basis and at a bodily level (see box d—*Carnal Sociology*). For instance, embedded as an international civil servant within the UN Refugee Agency (UNHCR), Fresia decrypts the making of a common professional identity (2013). Researchers can also recount specific practices such as actors' negotiating techniques and network building (Riles 2001) while experiencing the same temporal and spatial conditions that constrain international negotiators and IO staff (Eckl 2021; Kimber and Maertens 2021). They can depict discourse production influenced by routine, discontinuity, and informality while identifying mechanisms of knowledge production and the impacts of staff beliefs, individual and variegated engagements, and day-to-day activities on the implementation of an organization's mandate (Atlani-Duault 2008; Autesserre 2014).

On the other hand, participant observation also facilitates collection of other types of data. First, it allows researchers to compile written sources through access to gray literature (internal documents in particular) and the intranet given only to IO staff, for instance. This way, participant observers can potentially trace back the evolution of a speech or the influence of different contributions through access to draft reports and comments from copy editors (see chapter 10—*Document Analysis: A Praxiographic Approach*, and chapter 25—*Process Tracing*), to unpack the selection process that disappears once the report is published under one logo (Gayon 2016). Second, during participant observation, researchers can retrieve artifacts (see box o—*Artifact Analysis*) and produce visual data: sketching the settings of negotiations, taking pictures (see box f—*Reversed Photo-Elicitation*) or collecting images produced by the organization under study (see chapter 9—*Visual Methods*). Third, it enables to conduct ethnographic interviews (see chapter 3—*Ethnographic Interviews*) and encourages positive answers to interviews requests.

How?

Preparing Participant Observation

First knowing "when" and "where" to conduct fieldwork is not only conditioned by the research's ambition but contingent on the subject and the organization. For instance, international summits are planned months, even years, ahead but occur over a few days, requiring availability and flexibility, which may not be compatible with university schedules. On the contrary, bureaucratic work and organizational culture might be less subordinate to specific calendars and rather rely on cyclical work (Eckl 2021). Each organization performs along its own rhythm and requires specific accreditation processes that the researcher needs to find out about to determine the right moment to conduct the most productive fieldwork. For example, to follow international negotiations, you may have to accredit your university the year before the summit: the lengthy bureaucratic process should not be underestimated. In addition, participant observation within IOs may also involve travels that are all the more costly when immersion does not get financially reimbursed.

Second, researchers can take on different roles and positions to access IO perimeters. Most often they rely on internships, volunteer work, or staff positions within an IO (typically within their main secretariats or country offices), a permanent representation (or an embassy), or a delegation (be it governmental or within civil society groups, etc.). At a multilateral meeting, for instance, access depends on the type of badge—governmental delegation, civil society, press, and so on. This variety of access has consequences for the empirical material researchers can produce through participant observation. For instance, integrated as a civil society member, the researcher witnesses advocacy strategies disconnected from the secretariat's functioning; hired as an intern, they are at the heart of the secretariat's debates, meetings, and productions. Although one cannot always choose the acquired position and degree of participation, each position generates valuable data. Researchers must however ensure that the data generated through the given access is adequate and sufficient to answer their research question (see table 3 for a schematic overview), otherwise having to readapt the question. Concretely, accreditation is often the most laborious step. Such a process can take up to several months. While having prior basic knowledge about the organization and its actors is mandatory, researchers can facilitate their access by activating a network of contacts based on previous experiences, preliminary interviews, academic networks, or personal acquaintance. Finally, the researcher may also need permission from their institution, through a research ethics committee for instance, to conduct fieldwork.

In sum, preparing and anticipating temporal, legal, relational, spatial, and financial dimensions positively impact the quality of the generated data (Bourrier 2017; Louis, Maertens, and Saiget 2018).

Conducting Fieldwork

Once in the field, obtaining site maps and meeting programs helps navigate the spaces and provides information about the nature of the site. While researchers must learn to emancipate from key informers, colleagues, internship supervisors, and administration members can also be a daily resource for the study thanks to their knowledge of the system as well as their networks. Carrying out participant observation in an IO requires a personal investment not only in developing relations but also in acquiring certain skills, in particular linguistic ones: while a good command of English is

Table 3. Data Generation and Participant Observation in IOs

Position in IO perimeters	IO Secretariat	Government delegation	Civil society groups	IO operational activities
Privileged relations with . . .	- IO staff - Delegates	- Member state delegates - National governments	- Civil society members - Civil society networks	- National and local partners - “Beneficiaries” - National and local staff - Expats
Privileged information on . . .	- Internal functioning - Organizational cultures - Staff practices - Relations between IOs - Meeting preparations and proceedings	- Hierarchies among member states - Relations between member states and IO staff - Negotiation strategies - Official statement elaborations	- Activities of advocacy, lobbying and networking - IOs’ inclusion and exclusion dynamics of civil society - Relations with IO staff, members, and among NGOs	- Implementation of IO mandate - Perception of IO activities by their “beneficiaries” - Relations between national and international staff, IO staff, and local partners
Challenges	- Technocratic influence - Conflicting allegiance	- Identification with delegation preventing access to other members	- Access denial to member states and UN staff spaces	- Disconnect with IO HQ and international decision-making arenas

often indispensable, the research object can require speaking another language and being familiar with the organization’s jargon.

In terms of what to observe, there is always something to pay attention to. While the researcher orients their observations based on the initial research question, we advise to be as exhaustive as possible by rigorously transcribing all information broadly related to the research object. The researcher may either discreetly take live notes or dedicate time slots to write down the observations of the day (e.g., right after working hours). Each observation should be transcribed with elements of context clearly distinguishing observation from potential interpretation. The notebook (be it traditional notepads or smartphones)—afterwards—becomes an essential tool to identify overlooked facts and expected anecdotes with no analytical significance: observations perceived as insignificant while taking notes may appear more interesting due to multiple occurrences when rereading them;

likewise, an event considered a major turning point at the time may appear slightly different at a later stage. Also being open to disruptions, changes, and “surprises” allows the researcher to seize new phenomena as they unfold, potentially shifting the initial research question.

Finally, after a first familiarization phase with the field and a second longer observation period, the researcher needs to conclude the study. While considering (im)possible returns to the field, the researcher can reclaim their role by presenting preliminary results (see also box e—*Exiting Fieldwork*).

Analyzing Data

When analyzing data, the researcher should objectify the observations and be aware of the possible subjective biases and emotional factors (Beaud and Weber 2010). When it comes to restituting the final research, the notebook can be used in two ways: first, excerpts can provide “thick descriptions” recounting the context and the actors’ whereabouts and voice; second, fieldnotes are compiled to account for repeated daily routines and mundane activities through which international politics are negotiated and IOs are enacted.

What Challenges?

IOs do not easily and willingly open doors, especially if the researcher has traditionally had a critical stance toward their missions (Weaver 2008: 14). First and concretely speaking, access is often a critical obstacle. IOs are safeguarded organizations, which operate away from public scrutiny in a controlled and controlling environment. Yet the relative openness/closing of an IO already sheds light on its functioning (Pomarède 2020). Conducting fieldwork within an IO may also include physical and emotional security risks as well as financial and practical issues (especially for observations in remote places, see box z—*Expeditions as a Research Method*). These challenges can be anticipated, but they often require adaptation, improvisation, or even revisiting the research project and key questions when the field is totally closed off.

Second, participant observation raises ethical issues regarding anonymization and the use of data generated in informal spaces during the study. For instance, how to include empirical material to which the researcher has gained access through sources they are not authorized to quote? This is especially important when fieldwork takes an informal shape through “hanging out" outside or at the sidelines of bureaucrats' or diplomats' professional habitats (Nair 2021). First, researchers should disclose their observation without needing to be specific about their research question. Second, they may use anonymization techniques where thick descriptions include multiple actors, events, or practices gathered within one fictional restitution, or where quotes are rephrased and not attributed (especially if recording was used to help notetaking during events where speakers were not fully aware of the researcher's practice, e.g., a plenary session during a negotiation). Another solution consists in matching the information gathered from other sources (see part 5—*Combining*). Overall, academic research does not aim at unveiling scoops (see box v—*Challenging Secrecy*), it selects sensitive information necessary for the demonstration while respecting ethical and legal rules when disclosing personal data where respondents can be identified (e.g., deleting names might not be sufficient to prevent identifying an individual).

Finally, researchers should account for their positioning and prepare their exit as the field may be transformed due to multipositionality and respondents' expectations (see box c—*Multipositionality*, and box e—*Exiting Fieldwork*). Long-term observations create personal relations with the respondents who often forget about the researcher's initial motive, especially in the context of "expats' bubbles" where professional and personal lives overlap and where the lines between formality and informality become blurred (Louis, Maertens, and Saiget 2018). Researchers can also be involved in the production of their own primary sources, in information sharing, and in producing an interpretation of events that can affect the respondents' perceptions. Yet by being reflexive of their own presence and seeking support from their advisor and their institution's ethical committee, researchers can subdue feelings of unease and learn from their impacts on IOs: it informs on the production process of discourses and artifacts while providing information on the organization's openness.

To Go Further

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