A Fieldwork Guide for Researchers working in Authoritarian and Challenging Environments

Version 2 (2025)

About this guide

This guide has been developed by the Authoritarian and Challenging Environments Research Group (ACERG), a specialist group of the Australian Political Studies Association (APSA) which was established in 2023. ACERG was set up to support and promote political research on and in environments where data collection is difficult, with a special focus on in-country fieldwork in authoritarian or conflict-affected places.

Fieldwork will always be an unparalleled method of gathering data for political scientists, particularly for qualitative and inductive studies. However, the very nature of authoritarian and conflict-affected areas makes the data collection process a complicated, sensitive, and often risky endeavour. This is most clearly evidenced by the number of cases where academics have been arrested or imprisoned in recent years.

Academic institutions have not always known how to respond to these challenges, and as a result researchers (particularly PhD students conducting fieldwork for the first time) have not known where to look for advice.

This guide is the product of a two-day ACERG workshop held in May 2024 that aimed to fill this knowledge gap. Over two-dozen academics with experience of fieldwork in challenging environments were asked to list the main lessons that they had learned through their own fieldwork experiences, and to categorise these as they relate to various audiences and activities. The guide was updated in July 2025 following feedback from the 2025 ACERG workshop.

The purpose of this guide is to assist researchers (both new and established), supervisors, and universities in understanding and preparing for the challenges associated with fieldwork. It includes sections on security, pre- and post-fieldwork logistics, advice for supervisors, and information for institutions. Note that we do not recommend that researchers carry a hard copy of this guide during their fieldwork, as some of the advice given may relate to security advice that could draw suspicion from local authorities.

The guide is not intended to provide practical advice for the research process itself (interview techniques, qualitative research design, etc.). For that, we recommend consulting the literature on fieldwork methods in complex environments. A good start is the list compiled by Advancing Conflict Research: https://advancingconflictresearch.com/new-page-1

While no guide can answer every question relevant for every context, our hope is that this document, in concert with ACERG's ongoing engagement with researchers, will help foster a culture of advice sharing that will assist both researchers and research in this critical field.

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1. Researching responsibly

Comprehensively consider the risk your participants, yourself, and your loved ones

Researchers should carefully consider the risks of research, and weigh up whether the benefits genuinely outweigh these risks. Is your research and its impact worth the potential that participants could be harmed or face consequences for their participation? (It often isn't). Consider:

- What risks are you willing to take?
- What are the likely consequences if you are injured, imprisoned for a long period of time (or worse)?
- How would these consequences weigh on your family, colleagues and friends?
- Is it worthwhile?
- Is the risk of your project inherent to the research question/sub-questions/hypothesis, and is the benefit of this research worth this risk?
- Only you can weigh up your own personal risk tolerance, which will vary greatly according to context, your own positionality and your personal preferences. You do not need to apologise for having a very low tolerance for risk.

Fieldwork should be designed with the research context and your positionality at the forefront of your mind

No two fieldwork environments are the same, and all good scholars must be cognisant of this when planning research. This means that there is no 'one size fits all' fieldwork plan/safety protocol/exit protocol, etc. Speak to as many people as possible to understand the nature of the fieldwork environment that you are planning to enter. If you feel that you need more specific advice, you may wish to consult ACERG's register of country and subject experts (in development at the time of writing. Please contact the ACERG conveners for information).

Risks and consequences also differ greatly as a result of your own positionality. Factors like your gender, citizenship, family ties to the country of research, and the intersection of these and other factors, can radically change the risks that one researcher faces compared with another. For this reason, it is not wise to assume that you can manage the risks of a particular fieldwork exercise just because other researchers have done so. Awareness of your own personal risk profile must be built into your fieldwork design.

International students, non-Australian citizens and dual nationals should take particular care when planning fieldwork because DFAT is unlikely to be able to offer any support in the field should things go wrong. Please check with your own governments to understand the level of consular support that you may be able to access in the field, and build this into your plan. Dual nationals may also be treated differently to Australian citizens, particularly if you are undertaking fieldwork in a country that you are a citizen of, so do not assume that your Australian citizenship will be recognised by your home country, or that DFAT will be able to provide consular access.

Consider the ongoing risk to yourself and your participants after you return

Sometimes risk does not end when you exit the field, and you may later face dangers (particularly over the internet) from people wishing to access your data. The same goes for your participants, who may face additional dangers post-fieldwork or post-publication.

While there is no easy solution to this, scholars should:

- Take cybersecurity seriously at all times (see below), even when back home
- Carefully consider what you need to publish, as some data will have marginal benefit to your project but may increase risks to your participants, and once something is published online it is almost impossible to have it completely removed.

Create a plan for working with local partners

Many researchers work with local partners in the field, including 'fixers', translators, and research assistants. This can be a powerful way of undertaking fieldwork, but it is important to make sure that when you're designing your safety/risk/exit protocols, that you consider the uneven impact of risks on local partners, who may not be able to leave the country. Have conversations with your local partners about how to operate safely in the field, and the type of protocols they would like to implement to ensure everyone stays safe.

Remember that even if you are planning "remote" or "outsourced" fieldwork via local partners, the risks and measures discussed in this document still exist for your partners and need to be taken just as seriously. You have an ethical responsibility to these partners, so ensure that you consider whether local partners can manage their risks in the same way that outsiders can. Often they will face added dangers as a result of not being able to exit the field.

2. Basic planning/logistics

The following points are not intended as a checklist. They are points to consider in the context of the location of your research and your relationship to it, along with your personal comfort level in relation to potential risks. Not all points will apply to all people or all projects.

- Share your location with a trusted person back home (ideally with standard commercial software, as non-standard software may also raise questions). Make sure you use a VPN while you are sharing your location.
- Send messages (via Signal, or similarly secure app) to someone trusted in-country and/or someone at home with your anticipated agenda for the day (i.e. the names/details of those you plan to meet and the location of your meetings). Tell them when you are home safely, and ask them to raise the alarm if they have not heard from you by a certain time.
- Consider taking an additional GPS locator that you could keep in a pocket, should you be separated from your phone, or it loses charge.
- Use a phone with decent battery life and carry fully charged battery packs for any device that takes them.

- Confirm that you have travel insurance appropriate for the context you are travelling to (in Australia, most insurance companies do not provide coverage for countries that DFAT lists as Level-4; read the fine print).
- Consider preparing a grab bag (essential travel documents, medicines, clothing, and non-perishable food).
- Carry a basic medical kit, including electrolytes (great for dehydration, including if you get gastro), and a door stopper.
- Carry copies of your important documents (passports, insurance, etc).
- Carry extra US dollars and know where/how you can get cash out quickly if necessary. Keep an extra credit/bank card somewhere separate to your main card.
- Pre-load offline maps of the country you are traveling to in Google Maps prior to departure in case you lose mobile coverage (the GPS works on most phones without internet coverage).
- Consider any risks that are specific to your identity, (e.g. gender, LGBTQI+, disability, religion, personal connections to place, etc) that may be relevant in the context that you are researching.
- Ensure that you are traveling under the right visa type—some countries require a specific research visa, so confirm this before you leave.
- Consider your rights based on citizenship. For example, will the country of your university assist you if you are in a country where you are a citizen? If you are a citizen of the country you are researching, are there additional expectations you should be aware of? Will the Australian government evacuate you in the case of an emergency? Does your university's travel provider provide evacuation assistance, and if so where from (it may be from a neighbouring country)?

3. Cybersecurity

- Set all of your devices to 'auto update' and make sure that they are running the latest security updates before you enter the field. If you have an older device, check that it still receives security updates, and if it does not, consider purchasing a new device.
- Minimise the number of non-essential apps on your phone, and make sure that all are always running the latest software versions.
- Make sure that none of the software that you are using (including versions of Windows and Office 365) is pirated, as pirated software often contains security flaws and in-built vulnerabilities
- Ensure that all of your devices (including your phone, laptop and any hard drives or USB sticks) are encrypted before you leave home. Make sure that you store a hard copy of the decryption key somewhere safely at home
- Consider installing (and using) a VPN (virtual private network) on all devices, particularly if using public/hotel WIFI connections. Note that some VPNs can be closed down periodically by governments that forbid their use, so it's wise to get up to date information about the best VPNs to use from people who have been in the country recently.
- If possible, communicate with participants through an app that uses end-to-end encryption such as WhatsApp or Signal, rather than SMS.
- Remember that mobile internet (through a sim card) is typically safer than through WIFI, although it is not always safe

- Consider using a clean phone/device that does not have your personal information, including social media accounts, on it. Consider buying a local sim card to use in the field.
- It is best to assume that all data that is sent via your phone that is not sent through an end-to-end encrypted source or VPN can be viewed by authorities
- Don't accept free sim cards (often with free data) that are sometimes offered at airports.
- Consider using a Faraday bag for electronic devices to block wireless signals, and protect them from hacking, prying, tracking, etc.
- Get specialist advice from about how to store and backup your data securely, including whether it is best to upload your data onto a university-managed Cloud account. It can sometimes be better to keep your data locally on an encrypted USB stick that you hide in your belongings.

4. In the field

- It is safest to assume that you are on the radar of local authorities when in the field and to act accordingly.
- Identify hotels that have security appropriate to the context (remember that while the larger international chain hotels tend to have the most security, this is also because they may be more likely targets).
- As a rule of thumb: if it's truly sensitive, don't write it down.
- A bigger rule of thumb: no research is more important than your safety and the safety of your participants and others with whom you are in contact.
- Remember that careers are long, and insights also come from the things you choose not to say and do.
- Know the name and location of the nearest (good) hospital/s.
- Have a simple and generic (but not untrue) explanation of your research ready in case you are asked at the airport/checkpoint that you can provide in plain language. It may also be helpful to be able to explain your work in terms of theory/the literature rather than just events on the ground, as this might be seen as less interesting to authorities. This may also be relevant for airports and checkpoints before you enter the field.
- Decide on your own personal red lines before fieldwork, and stick to them. It can be easy to get carried away in the excitement of making progress but remember why you had these red lines to begin with. You may find that a 'risk matrix' (like this one from Safety Culture) that weighs up the impact and likelihood of various risks to be a useful tool to think through these risks and red lines before you go to the field.
- Contingency planning is important: know what you would do if things changed quickly.
    - Who would you ask for help?
    - Can you access extra funds in an emergency if you need to?
    - Is there somewhere you could go while you reassess your plans?
    - Could you exit the country by land if airspace was closed?
- Invest time in building friendships and other social support systems. These make your time more enjoyable and are also helpful in a crisis.
- Meet interview participants in public places, especially for the first time, and if they haven't been introduced to you through someone you already trust. Other scholars may

be happy to meet participants in more risky places, but don't feel pressured to do anything that makes you feel uncomfortable.
- Consider what you're wearing and what it means in the context.
- Know the local norms around alcohol consumption and be wary of drinking around those who you are engaging with in your research.
- Take breaks. Working constantly might feel important, particularly if your time is short, but make sure you are taking time to recharge.

5. At the airport/checkpoints

- Make sure someone knows when you are expected to leave and your flight details.
- If you are moving through checkpoints on the ground, make sure you understand the protocols beforehand. It is also good to know what you should expect (e.g. is it common for them to take your passport and make phone calls, or does this indicate a problem?)

6. Who not to talk to

- Figuring out who you want to talk to is just as important as knowing who you don't want to talk to.
- If someone starts to tell you something that sounds particularly sensitive, telling them that you don't need/want this kind of detail can send a message, and help to confirm the academic nature of your project.
- Remember also that for academic projects, sensitive information usually isn't as useful as you might initially think. Be wary of anyone who seems to want to tell you things that are overly sensitive.
- Remember that people will talk about you and your research (particularly if you are moving in relatively small circles) and reputation matters. Be consistent with how you explain your research to those you are interviewing.

7. What to do if things go wrong

- Consider writing a formal plan for what you might do 'if things go wrong,' which could be issues related to your research, or things beyond your control such as political instability or natural disasters. Make sure that you design this in line with your own personal 'red lines' and you enact if you feel that these lines are being breached.
- Compile a list before you leave (for loved one/supervisor/etc) of who to call in case there is a problem. Give phone numbers – names are less useful in an emergency.
- The list will look different depending on context but should include:
    - A trusted contact/s on the ground who could confirm your whereabouts quickly (eg. call your hotel, check your last known location).
    - A trusted contact on the ground with security connections, who would know how to raise the alarm if necessary.
    - Someone working in the local Australian/allied embassy who could do the same.

- Someone working at DFAT (or similar) in Australia who could also start making inquiries.
- Your supervisor/manager at the University.

8. Post fieldwork

- There can be complex aftereffects from fieldwork. Go into it knowing this and have a reintegration plan. This may include keeping in contact with others who have had similar experiences or seeking a therapist.
- Be aware that transcribing interviews and/or remaining in contact with your participants can raise issues of vicarious trauma. Think about the kinds of boundaries that might be appropriate for you after you return home.
- Don't make high risk decisions shortly after returning home, even though you may be drawn to doing so. Remember that there may be an adjustment period and consider discussing this with your close family/friends.
- It is possible that you will be questioned by Australian Border Force upon your return. Consider in advance how you might respond to this.
- Consider a general medical checkup once you have returned.
- Consider whether it may be appropriate to publish your research under a pseudonym—this may be unappealing to most people but could be prudent in some instances.
- Consider seeking the professional services of a psychologist or counsellor to debrief and psychologically/emotionally process your time in the field (your university may supply this under student/staff free counselling). There are also good therapists who specialise in helping people who have worked in conflict-affected environments.

9. Supervisors

- Make sure the student is aware of, and commits to practice, the points above.
- Supervisors should maintain regular contact while a student is away for fieldwork; establish a pattern where the student sends an 'I'm fine' message each day/few days, as agreed and depending on the level of likely risk.
- Be careful of implicitly valorising dangerous work. Have frank conversations with students about the level and type of risk they may be exposed to, and their comfort with that. This should include your own red lines for risk, for example, 'I expect you to return to Australia if x/y/z occurs.'
- Have frank conversations about your expectations for output during the period of field research. This will depend on the amount of time the student will be away for, but it is worth advising students to:
    - Transcribe interviews (especially if they aren't recorded) right away.
    - Keep notes in a way that will be searchable (e.g. through keywords) later.
    - Write as they go (without the expectation that what they write while away will necessarily appear as is in the final thesis). This can be useful for maintaining structure and purpose in interviews.
- Know your own limitations, and if the place of research is not in your area of expertise, find mentors/peers who have more experience than you (if you are unsure of who to

speak to, contact ACERG to be put in touch with a subject matter expert). There can be other finer lines here if the student is traveling to an area that they are deeply familiar with and they have insider status and skills. This could put the student at greater or less risk. Remember also that research contexts change rapidly, and lessons you may have learned in previous fieldwork experiences may no longer hold true today.

10. What institutions should understand

- Reliance on DFAT warnings is not always appropriate, and do not account for positionality. If the level of risk is unclear, country experts should be engaged to prevent over/understatement of risk. Other risk guides that could be considered include that produced by International SOS
- Zero risk is impossible, but it can be managed.
- Over-securitising requirements can provide its own risk (for example some security protocols can make researchers a more obvious target). This needs to be considered on a case-by-case basis.
- Safety protocols can often take the form of box-checking exercises, where those giving the security advice (such as the university's risk management provider) may have considerably less expertise than the student/researcher.
- Students would benefit from fieldwork training, including funding for RedR's *Hostile Environment Awareness Training* or Control Risks training. This is something that could be organised cooperatively with other institutions or with AusPSA.
- Some students may benefit from funding for psychological care upon their return.
- Meagre fieldwork funding has implications for the safety choices that students will make, including the safety of the hotel, or forms of transportation chosen.