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METHODS OF VIOLENCE: RESEARCHER SAFETY AND ADAPTABILITY IN TIMES OF CONFLICT

By Jeremy Slack, Daniel Martinez, and Prescott Vandervoet

Introduction

During a research project on the experiences of undocumented migrants that had been apprehended and returned to Mexico, we were faced with the difficult decisions regarding continuation of research following several high-profile incidents of violence near our research site. There were a variety of opinions among the researchers involved. In this article, we have included three different researchers’ voices and opinions. These perspectives lead us to address broader issues involved with our responsibility as researchers to document the most prominent issues affecting our research localities in a reasonable albeit methodological manner.

Beginning in 2007, a group of graduate student researchers participated in a quantitative study known as the Migrant Border Crossing Study (MBCS) to document the experiences of migrants who had crossed through the desert in Arizona, been apprehended by U.S. immigration authorities and returned to Mexico. Daniel Martinez has been the Principal Investigator since the fall of 2007, and Prescott Vandervoet and Jeremy Slack joined the project in October 2007 January 2008 respectively.

The MBCS research team gathered for an emergency meeting in early October 2008. We rarely met as an entire group, as our hour-long carpooling from Tucson to our research site in the northern Mexican city of Nogales allowed for ample discussion regarding any study-related issues (See Figure 1). [Unless otherwise specified, we are referring to the city of Nogales in the Mexican state of Sonora rather than to the Arizona city of the same name.] The survey was an attempt to gather generalizable data about the experiences of undocumented migrants during their border-crossing attempts, apprehension by U.S. authorities and subsequent return to Mexico. However, an incident near our research site (a shelter catering to returned and deported migrants) on October 3rd raised questions about our team members’ safety: a double assassination occurred across the street from the shelter while four students were in the process of interviewing migrants. The cracking of automatic rifles was unmistakable, even to those unaccustomed to the sound of gunfire. The drug war had been escalating for quite some time throughout the border region and Nogales was experiencing levels of violence never before seen. High profile, public shootings between rival cartels had become a daily occurrence, and decapitated heads or mutilated bodies frequently appeared on the front pages of the local papers. That fall, federal and state police as well as Mexican military were deployed to Nogales, Sonora. Police helicopters and roadblocks suddenly bombarded once calm neighborhoods.

We were faced not only with the dilemma of cutting our research short, but also of failing to record how drug violence affected migration. In this article, the three authors discuss the issues involved with anthropologists conducting research in a potentially dangerous environment, as well as the need to create flexible research designs that do not neglect the most prominent issues impacting our research. In the sections below, we focus on the voices of three team members involved with the project to illustrate different opinions from the internal debate about whether or not to continue the research. Analysis focuses on the challenges posed by working in dangerous situations and the need to do so in order to contribute to a broader understanding of the violence that is occurring from the perspective of the researcher. The widespread concern that we were exposing ourselves to an unacceptable risk came from many sources: faculty, administration and students. As a team, we engaged in a spirited debate with concerns from all sides being voiced. While there was (thankfully) never a formal mandate by the University of Arizona to halt all research on the border, many projects did cease or reduce their activities along the Mexican side of the border during this time. This raises a critical point: How is “danger” assessed, and when is it ethically acceptable to abandon a project for “safety” reasons?
The Migrant Border Crossing Survey (MBCS)

The MBCS is a quantitative survey with the aim of gaining a better understanding of the sociological mechanisms and circumstances that shape migrants’ most recent unauthorized crossing experiences through southern Arizona. Southern Arizona has become the most important area for unauthorized crossings along the U.S.-Mexico border, as increased border enforcement effort have rerouted migration flows into the region (Rubio-Goldsmith et al. 2006). During the early 1990s, less than seven percent (on average) of all U.S. Border Patrol apprehensions occurred in the Tucson Sector. Today, this has increased to over 40 percent (U.S. Customs and Border Protection 2010). Thus, a study systematically examining the unauthorized crossing experience in southern Arizona was crucial.

MBCS surveys were conducted between October 2007 and August 2009. Survey participation criteria included (1) being at least 18-years of age; (2) having attempted an undocumented crossing along the Arizona-Sonora/Baja California border, and being apprehended by U.S. law enforcement; (3) being repatriated to Mexico within the past six months; and (4) agreeing to participate. These criteria would insure an accurate, recent account of the issues currently affecting the region’s border crossers. We used a spatial random sample to select participants. In total, 11 graduate students (including the authors) from four different departments at the University of Arizona volunteered their time and effort. By the end of the project we had successfully completed 421 one-hour long surveys in about 120 trips. Overall, only 14 potential participants refused to participate in the study, yielding a 96.7 percent response rate.

We collected many stories of kidnappings in U.S. “safe-houses” or “drop-houses” and of migrants being forced to traffic drugs at gunpoint. We received glimpses of huge currents of violence that flow under the migrant stream and, in many ways, are as powerful in shaping people’s experiences as the efforts of the Border Patrol and U.S. policy makers. A question that arises is, how can one get a deeper and accurate understanding of the forces at work, and types of pressure exerted, upon on the average individual who attempts to work in the U.S. without documents. Particularly, how can one conduct this research without exposing project participants and researchers to even greater danger?

The Dilemma Posed by Events and Conditions in Nogales

Due to the differing opinions among researchers, October 2008 events in Nogales posed several important challenges and questions for our research team. First, what is our responsibility to our research? How much danger can we legitimately accept and how does it reflect on those around us? What are the legal implications for a university? Is that purely an individual (hopefully, well-informed) decision, or are there benchmarks and standards for deciding when to continue or stop researching? And perhaps most importantly, what is our obligation to the issues that have the most impact on our research area? When violence is raging and it directly affects the issues we are looking at, regardless of previous desire to focus specifically on violence or crime, do we not have a responsibility to document it to the best of our ability?

From the three statements below, and in the comments of the other active research team members, it is clear that there is both agreement and disagreement among the researchers. And, while we would like to think that we are free to arrive at the answers to these questions independently, as academic researchers we are embedded in the institutional structure of a university for all of the good and bad that that entails. This leads us to the next point: When is it ethically acceptable to leave?

Perspective One:
Daniel E. Martinez

In addition to my duties as the project Principal Investigator (PI) I, I was in charge of transporting team members from Tucson to our research site in Nogales. I feel that I was personally responsible for our team members’ safety from the time we left campus until the time we returned in the late hours of the night. Further, I want to note that I have my personal feelings on the issue of violence in Nogales, as well as my beliefs as a principal investigator. At times, these sets of feelings have deviated substantially from one another. I must also mention that team members were never forced to go to Nogales. Everyone who went on trips to survey went on their own accord.

During my informal conversations with our friends at the research site it quickly became evident that the city’s residents had never experienced such a high level of violence as they had over the past few months. Some thought we should discontinue our research because it was not worth the risk. However, others felt that the risk was relatively low considering the cartels were not targeting residents, and were especially uninterested in targeting foreigners. Honestly, until the evening in question, I never felt like we were in any danger while in Nogales.

We continued our surveying trips with the team members who felt comfortable going to Nogales. However, that quickly changed the night that someone was killed in a cartel-related shootout across the street from the shelter. This had a chilling effect, and suddenly made the issue of violence a very real concern. It is one thing to talk about violence; it is another thing to be so close to it.

After a lengthy discussion with one of my mentors at the university, we decided that it was best to temporarily suspend our data collection process. I feel that it
was the right decision. I could not imagine having to call a student’s parents to inform them that their son or daughter had been seriously injured or killed after being shot while conducting research.

My position is that no research is worth losing one’s life. Sure, we can idealize the thought of conducting embedded research and illustrating the sociological implications of such acts of violence that may otherwise be overlooked. However, it becomes a very different situation when you are responsible for the safety of others. Even if scholars are willing to participate in high-risk research they must stop and considered that their endeavors may have consequences not only for themselves, but also for the people in their lives who care about them.

**A Second Perspective: Jeremy Slack**

Having worked as a researcher in Nogales since 2003, I was adamant that we not halt our research after the shooting. My rationale was that, as long as we are not facing any undue risks that locals are not also dealing with, it is difficult to justify halting our activities so as to avoid exposure to violence that the people we talk to, the people we work with cannot avoid. If foreigners were being targeted, I would have reconsidered it. As it stood, our risk of getting caught in the crossfire was still slim, as we only made one or two trips per week. In contrast, hundreds of thousands of people that live in the city were at greater risk. Because I was familiar with various groups of people throughout the city and frequently spent the night in the urban peripheral neighborhoods known as marginal colonias, I was well aware of the frequency of the violence.

Obviously I was not trying to impose my decision on everyone in the research team. Two of my colleagues had already chosen to refrain from fieldwork until the situation changed. I simply did not want any mandate saying that I had to stop what I was doing. We are all adults conducting research of our own free will. Moreover, as volunteers there would have been no monetary penalty for opting out of researching, which lessens the burden on administration and faculty who could be accused of penalizing us for avoiding Nogales if we were employees.

I left the group meeting thinking that I had swayed the group and that we would be allowed to continue our research, but later that day I got a phone call saying that another professor, that frequently helped to advise on the project had convinced the PI that we should stop. Despite the pretext of attempting to make the decision as a group in our meeting it came down to an executive decision based on the opinions of external faculty. It was a difficult decision for me to accept and, honestly, I maintained a presence in Nogales for a variety of projects and to keep contact with people at the research sites. For me, this was an important gesture to convince the staff and owners of the migrant shelter that we were committed to continuing our work and that we were not going to abandon our project or our friends during a difficult period.

**The Third Perspective: Prescott Vandervoet**

At the time of our meeting, my feeling was that the violence occurring in Nogales and other parts of the state was strictly targeted at a particular sector of the population, namely those involved in narcotics trafficking. Also, it appeared clear that a battle was occurring for space between rival factions, and that it behooved them not to engage other groups, as that would call heightened attention to the situation. Indeed, while many locals understood the escalating situation (Table 1), most Arizonans who did not live in border communities were

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<th>Timeline of Official Responses to Sonoran Border Violence during MBCS Review</th>
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<td>April 2008</td>
<td>The U.S. State Department issues a Travel Alert for Mexico. The city of Nogales is not mentioned.</td>
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<td>October 14, 2008</td>
<td>U.S. State Department Travel Alert updated, Nogales, Sonora mentioned for the first time along side Ciudad Juarez, Chihuahua, and Tijuana, Baja California.</td>
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<td>February 2009</td>
<td>The University of Arizona issues a Travel Advisory for Mexico as Sonoran beaches are traditionally popular Spring Break destinations for students and drug-related violence has not abated along the border.</td>
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<tr>
<td>March 2010</td>
<td>The State Department raised the level of their advisory for Mexico to a Travel Warning. The University of Arizona requires all students traveling, for school-related activities, to countries for which the U.S. State Department has issued a Travel Warning to fill out a waiver assuming risk and releasing the University from any responsibility.</td>
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unaware of the imploding public safety structure in their neighboring state. This was evident in the time it took the University of Arizona, and the U.S. State Department to issue travel advisories and warnings. In general, I considered the cartels to be playing by rules, which would make the situation less dangerous for people not involved with the drug issues.

Nonetheless, innocent Nogales residents were eventually caught in the middle of shootouts. I was present at the shelter the night of the shooting across the street, and there was a real feeling of vulnerability on the part of everyone in the building, as the automatic rifle fire was very close. Just a few weeks later, while in Tijuana with a friend, we witnessed a single person gunned down with an automatic rifle on the sidewalk directly in front of a bar that we were visiting. It was a crazy sight to watch approximately 100 people in the room duck down in response to the gunfire ringing out; cutting through the sound of the music. While this incident strengthened my feeling that the violence wracking Mexico was specifically targeted, it also increased my feeling of insecurity, as the violence could occur in any place and at any time. For me, the issue of violence came to a head a couple of months later as I was leading a group of teachers through Sásabe, Sonora. We were threatened by an individual with a semi-automatic rifle as we sat eating lunch in front of the Mexican Customs Building. The feeling of complete vulnerability was like a slap in the face, and I realized that even if most of those involved in this conflict play by some sort of “rules of engagement,” the insecurity could be omnipresent. Ultimately my feeling towards research in Nogales, was that it didn’t pose a direct threat to researchers, but during that time of heightened violence occurring in public (autumn and winter 2008) security was not guaranteed in any region of the Sonoran border. Thus, it ultimately caused considerable and unnecessary risk to our research team.

These sentiments represent only a few of the opinions in our research team. Two people dropped out of the project, while the other six agreed to accept whatever collective decision was given. Unfortunately, after the period of inaction (October 2008—March 2009) we never regained the full momentum of the research team and the majority of the final data collected during the spring and summer of 2009, fell to Daniel Martinez and Jeremy Slack. However, the mere need for this discussion, and the consequences of our decisions, raised a new set of questions about the ultimate goal of our research and our responsibility to record the drastic changes that exerted a strong influence on our research context.

**Researcher Responsibility**

While some of the issues shaping the context surrounding our research may be too dangerous, volatile, or sensitive to ever fully investigate in a way that would satisfy academic rigor, how do we balance the need for a basic understanding with the need to satisfy methodological standards? A number of anthropologists including Patricia Omidian and Patricia Delaney in Volume 31 of Practicing Anthropology have written about the physical risks of doing research and applied anthropological projects amidst the violence of warfare. In this sense the purpose of this article recycles issues of danger and fieldwork, applying them to our particular field site that happens to be one hour away from our University. The specific situation of border researchers requires attention because there is an increasing administrative pressure to discontinue research on the border due to the frequent media reports of violence.

This issue also takes us to another concern: treating the impacts of drug related violence on our research in a nuanced, methodologically sound way. While there were some questions on our survey that specifically addressed issues of abuse (by the border patrol, police, thieves and guides), issues of kidnapping and drug trafficking came up frequently, but was originally not documented, leading us to believe that there is still much to be understood about the nature of undocumented migration and violence. As a research team we noticed an undeniable, yet confusing link between human smuggling, drugs and border banditry (bajadores). The migrants themselves, frequently the most vulnerable people along the border were being sucked into the violent and costly drug war at the time, due in part to the tightening of crossing spaces by border enforcement that cause more suffering and danger throughout the entire crossing experience (Nevins 2008).

Can it be done in a methodologically sound way? Through over 400 one-hour surveys with people who had recently attempted a crossing, we realize that there is still a lot to learn about how these clandestine forces operate. The survey instrument was not designed to capture these issues and therefore much of our analysis will not address it. However, a survey is not the best way to get at issues so hidden and potentially dangerous. This is because the majority of the migrants understand very little about the structure of the system (e.g. human trafficking, drugs, bandits) they have gotten involved with. They come to the border with the intent to cross into the U.S. but immediately get involved with individuals that have decidedly different agendas. Moreover, overlap between drug runners, human smugglers, human traffickers and bandits who prey on migrants is on the rise in response to militarization of the border and crackdowns on the flow of drugs within and from Mexico. How do you identify a target population and focus directly on this topic in a quantitative or qualitative way? The short answer, one cannot.

The ethnographic tool kit offers several answers to the methodological approach, but there are also pitfalls. By casting a broad net and meticulously re-
Conclusions

The authors seriously hope that the University of Arizona and other institutions do not institute travel bans. The administrative need to address and minimize risk and the ramifications for personnel in potentially dangerous environments is real. Waivers can be a useful tool to ensure that individuals affiliated with a university recognize the dangers of the setting they will enter. At the same time, researchers who have spent years learning about these places are often in a far better position than administrators to assess the unique situations of potentially dangerous environments, and to make the ultimate decision about whether or not to conduct research. All of the authors frequently give advice to other students and faculty planning their own travel and research along the border. This is a useful service, but it is far from ideal. As a team of investigators it is easy to get lost in our own research, with our circle of contacts and not see all the changes going on around us.

When massive changes occur where we do research, as has happened along the border in the past five years, we need the will to engage these events on a deeper level that can expand the picture painted by journalists who are often only concerned with providing a body count. We need to confront the challenges of working in these environments head on and recognize new and important issues that are influencing our field sites. Yes it is scary. Yes it is dangerous. Yes it is more work, but it is necessary if we want our research to take a prominent place in debates about human rights, abuse and the nature of conflicts.

Post Script—Jeremy Slack

In September of 2010 I made a trip for scoping research to bring a similar project to Ciudad Juarez, the city most affected by the drug violence in Mexico. While there, I was able to see the full impacts of a University policy that prohibits travel to its sister city in Mexico. The University of Texas El Paso prohibited any university related trips to Juarez in May of 2010. It was clear that this policy has real impacts for relationships along the border and also has huge symbolic ramifications. The researchers at the Universidad Autónoma de Ciudad Juárez expressed their frustration at the inability to attract U.S. scholars to events on campus and that the travel ban at a University, once the model for community involvement and transborder relations was yet another blow to those that continue to live and work in Juarez. The ban is yet another reminder that “where you live is too dangerous for me to even go.”

Anthropologists and other social scientists who engage in long-term research are uniquely positioned to combine accounts based on extreme events with a deeper understanding of everyday life. The large variety of voices and opinions that go into ethnographic accounts, as well as the luxury of developing an opinion over longer periods of research are key in dispelling or tempering more sensationalistic accounts. Even more importantly, this knowledge is key for administrative staff concerned about issues of safety and liability in research.

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