

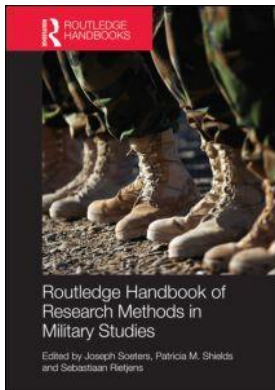
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Access details: *subscription number*

Publisher: *Routledge*

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Routledge Handbook of Research Methods in Military Studies

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Reflexivity

Publication details

<https://www.routledgehandbooks.com/doi/10.4324/9780203093801.ch4>

Eyal Ben-Ari

Published online on: 09 Jun 2014

How to cite :- Eyal Ben-Ari. 09 Jun 2014, *Reflexivity from:* Routledge Handbook of Research Methods in Military Studies Routledge

Accessed on: 03 Oct 2023

<https://www.routledgehandbooks.com/doi/10.4324/9780203093801.ch4>

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4

REFLEXIVITY

Potentially “dangerous liaisons”

Eyal Ben-Ari

Eyal Ben-Ari (1998) *Mastering Soldiers: Conflict, Emotions and the Enemy in an Israeli Military Unit*. Oxford: Berghahn Books.

Mastering Soldiers is an ethnographic study of an infantry battalion of the Israeli Defence Forces in which the author served for eight years. As an officer in the unit and a professional anthropologist, the author was ideally positioned for his role as participant observer. During the years he spent with his unit he focused primarily on such notions as “conflict,” “the enemy,” and “soldiering” because they are, he argues, the key points of reference that form the basis for interpreting the environment within which armies operate. Relying on anthropological approaches to cognitive models and the social constructions of emotions, the author offers an analysis of the dynamics that drive the men’s attitudes and behavior. In addition to his participation in staff meetings, he observed training exercises, took notes during conversations with his fellow reservists, and conducted 30 interviews.

Examining the soldiers’ use of language, the author identifies three folk models they use to interpret and act within military life. These models – based on the machine metaphor, the brain metaphor, and the rhetoric of emotional control – comprise a more complex cognitive schema of combat. The utility of these taken-for-granted models is apparent in descriptions of battles, and especially in providing points of reference for appraising and prescribing soldierly behavior. For example, since lack of emotional control may impede the completion of military tasks, according to this schema the soldierly ideal is composed and confident behavior under pressure. Ben-Ari contends that troops subscribe to this schema and that it is common not only throughout the IDF, but in all Western military institutions. However, he also shows that differences exist, between the IDF and other Western militaries primarily in the ways in which enemies are dehumanized: while they are objectified in the Israeli military context, during certain periods they were demonized by forces such as the Americans in the Pacific and Vietnam Wars.

Throughout the volume and in the appendices Ben-Ari provides reflexive explanations about his methods and positions within the battalion and in Israeli society. The appendices methodically

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describe and explain the field methods used and the procedures utilized in analyzing data. These depictions elucidate the principles of the ethnographic approach he uses. Specifically, Ben-Ari explains how ethnographic work should be carried out through seeking multiple sources of data, awareness of the social location of the researcher in terms of the information gathered and the actual interview schedules, observational techniques and use of documents used. In addition he gives details about the methodology of interpretation through describing how he created detailed indexes of his field notes and literature review and compared the categories derived (and the data included) in order to explore hypotheses.

Criticisms of the volume include first, that the amount of data he provides to undergird arguments about the wider significance of the volume such as the relationship between citizenship, military service, and masculinity is insufficient. Second, his suggestions that the IDF has developed a rational and humane policy toward enemy civilians is unsupported by evidence, reducing the usefulness of his analysis for those concerned with employing military forces in peacekeeping and peace-imposition roles. Third, and more relevant to this chapter, he does not pay enough attention to the wider political and economic framework that produced not only the models he describes but also the conditions of extended military occupation and oppression.

Introduction

Any piece of social research, whether qualitative or quantitative, should spell out its methodological tools: its route into the field, methods for gathering data, means of interpreting this data, and the textual representation chosen. Such descriptions – reflexive comments – are important because they allow readers to evaluate the limits and benefits of the study. Such descriptions are not straightforward, however, since any research activity is never simply only scientific or scholarly. It is also expressive of a presupposed social and cultural world to which the research project belongs (Salzman 2002). Hence an adequate account of research – a reflection about it – should take into account and report about the epistemological and political forces that condition it (Whitaker 2000). Discussions of the concept of reflexivity grew out of these understandings of the social character of research.

At its most basic, reflexivity is consciousness about being conscious (Myerhoff and Ruby 1982). Processes of reflexivity – thinking about our thinking – loosen us from habit and custom and turn us back to contemplate ourselves and our actions. Once researchers take into account their role in their own productions – something perhaps experienced as exhilarating or frightening or both – they may achieve a greater originality and responsibility than before, a deeper understanding at once of themselves and of their subjects. From the perspective of this chapter, reflexive knowledge about researching the military contains not only data but also information about how it came into being, that is, the processes by which it was created (Myerhoff and Ruby 1982). Though the term may appear fashionable (particularly within anthropology and qualitative sociology), the idea of reflexivity is actually very old such as in storytelling found in all cultures. While reflexive stories are also told in the academic world, they are usually found in more informal settings such as coffee sessions during conferences. It is not surprising then that in many older academic texts, one sometimes finds reflections about research in the marginal parts of volumes such as prefaces, acknowledgements or forewords (Ben-Ari 1995).

Finlay (2002) suggests that there are varieties of reflexive practices, each of which provides different opportunities and challenges. These include: *introspection* or internal contemplation as a springboard for more generalized understanding about the (social) world; *intersubjective reflection* is based on the idea of mutual negotiation between researcher and researched; *shared collaboration* entails a much more conjoint activity in which participants are enlisted as co-researchers in a cycle of mutual reflection and experience; *social critique* involves acknowledging the power imbalances between participants that are brought into the research process so that opportunities are opened for a link to wider issues (such as social inequalities); and *discursive deconstruction* engages the attention of researchers to the ambiguity of meanings in language and how these impact modes of presentation. Whichever version is used by researchers, the idea is to turn the subjectivity of the researcher from a problem into an opportunity (Finlay 2002: 212).

Higate and Cameron (2006) argue that while the concept of reflexivity has been used for decades in the social sciences its impact on studies of the military has been marginal because of the prevailing assumption that researcher bias can be neutralized by adhering to the traditional positivist model of sociological research. Indeed, the title of this chapter is taken from a recent volume attempting to systematically reflect about the problematic relations researchers have with the armed forces (Ben-Ari 2011). Along with previous scholars, Higate and Cameron argue that researchers can gain much by reflecting on the process of doing research and in “writing in” the authors where appropriate into the texts. Their focus in studies of the military is on the motivations for research, how access to the sample was negotiated, and the criteria stipulated by funders. In this respect, there are disciplinary differences in the degree to which reflexivity is openly talked and written about, with psychology and political science probably less amenable than anthropology or qualitative sociology (Higate and Cameron 2006). Since much of military sociology and social-psychology and parts of political sociology are dominated by what Moskos (1988) calls the engineering (rather than the enlightenment) model of research (aimed at making the armed forces more effective), it is not surprising that almost all of the studies carried out during the decades following World War Two are not marked by a high measure of reflexivity. Rather, it seems, as Higate and Cameron go on to contend, most published research has been “cleaned-up” for analytical closure in the sense of the messy processes of research having been swept away. By messy processes they refer to the blind alleys scholars encounter, the constant application and discarding of data that is relevant or irrelevant to the analysis, and the testing and rejection of hypotheses that do not appear in the published text.

For all of the advantages of reflexivity, the concept and associated practices have come under legitimate critiques. First, too much reflexivity may devolve into amateur forms of self-analysis that may end up as little more than self-indulgence or methodological self-absorption (Salzman 2002). This potential is expressed in a tendency among some scholars to reflect on their work and their place in it rather than to do the work (Hatch and Wisniewski 1995: 131). Second, researchers should be wary of assuming that all of their realistic self-awareness and honest disclosure are available to consciousness and assume that people present themselves with no ulterior motive (Salzman 2002: 610). Third, and by extension, by saying we are reflexive as scholars researchers may mark themselves as postmodern or post-positivist thereby as belonging to certain (progressive) camps within the disciplines and in this way make a plea for academic prestige rather than advance research (Salzman 2002; Whitaker 2000).

In achieving thoughtfulness about research, Higate and Cameron (2006: 222; also Carreiras and Castro 2012) argue for the need for reflective auto-ethnographies. These enhance transparency and accountability and provide opportunities for exploring such issues as personal motivations for accepting grants from military funders, or interviewing a “captive” sample of respondents, some of whom may be subordinate and deferential to the wishes of a researcher

perceived as more powerful than they. But how does one become reflexive? In order to answer this question the chapter is divided into three sections to prompt readers to reflect on the whole process of research (that is, not only the stage of gathering data). In any case, I do not provide an exhaustive list of issues that should be taken into account, but rather inform readers about how to go about being reflective. Indeed, given the focus of this chapter I have begun with my own first book about the military and I will intentionally use examples taken from my own studies. Finally, while many comments are oriented towards qualitative projects, along with recent thinking (Carter and Hurtado 2007) the chapter also addresses quantitative studies. Indeed, one thrust of the chapter is to suggest thinking innovatively about bridging methods between the two traditions of research in the social science

Reflexivity in gathering data

Biographical aspects of researchers such as values, employment, personal status or key social attributes like age, gender, and ethnicity are all relevant for choice of a topic and field, the process of gaining access to it, and actions within it. While this is true of any social research, the specific characteristics of the military as a large-scale, hierarchical, masculinized, and secretive organization frames such considerations. The essays by Higate (2003) and Hockey (2003) are good examples of how autobiographical issues are brought into analyses of the peculiarities of military life.

Social positioning and social attributes

In considering reflexivity one needs to take into account some of the following issues. For instance, the inbuilt suspicion of outsiders found in any large-scale organization is intensified by the armed forces being “the” organization associated with national security. Hence, such biographical attributes as being a veteran or closely allied with the armed forces help base one’s legitimacy and overcome initial misgiving upon entry (see Chapter 2). Furthermore, because the armed forces are still a highly masculinized organization, gender may impede or facilitate rapport with soldiers. But following Lomsky-Feder (1996), women may actually have an advantage in studying soldiers because being “ignorant” they can ask many questions about taken-for-granted matters. Similarly, in some contexts such as the British one, class is important since if the researcher is middle-class he or she may be hampered in gaining access to certain groups labeled as working-class. And, because the armed forces are an extremely hierarchical organization, the level at which researchers enter could limit the willingness of the researched to cooperate since researchers may be identified as a means for organizational control or as stooges of commanders. Hence, it is important to keep in mind that even in the simple act of handing out questionnaires researchers may be unaware of how the answers obtained are framed by context: for example, are they handed out by or in the presence of senior or junior NCOs or by officers?

Personal features and interpersonal dynamics

Personal qualities such as willingness to understand others’ point of view or the ability to listen aid one in research. This point is especially important in regard to sensitive issues such as the use of violence by troops or relations with “enemy” civilians. In all of my projects about the Israeli military I tried to be as non-judgemental as possible in interviews and conversations. Furthermore, if researchers understand that research is a social activity the similarity to psychotherapy may be instructive in terms of gathering data. Just as psychotherapists use reactions to

themselves as data about patients, so researchers may benefit from seeing themselves as data-generating instruments who make explicit the process by which their interactions with others is a means to gather data (Russell and Kelly 2002). Put by way of example, resistance to external researchers may be indicative of wider resistance to military authority or to specific individuals in command positions. But researchers need to be forewarned that their individual impressions are not knowledge about the people studied. Rather their insights must be constantly and systematically triangulated against other sources of data.

Ethics and motivation

Gaining access to, and gathering data within, the field involves reflection about the ethical dimensions of research about the military, especially in conflict zones or near them (Wood 2006). Such questions as “are we doing harm?” and “to whom?” are especially important in such contexts since they touch upon the role researchers may have in armed conflicts (or peace-keeping) and our commitment to them. In this sense, reflecting about motivation is crucial here since, for instance, prior commitment either to making the military more effective or critiquing its actions may actually blind researchers to important questions: both political and analytical. Hence in many quantitative projects a priori motivated by a desire to improve military performance may stand in the way of understanding how research is carried out within specific political and organizational contexts (Ben-Ari 2012). To put this point by way of example, many studies of the Israeli military that apply available social psychological theories pertaining to leadership, discipline or cohesion miss the wider political situation of a military occupation that influences the behavior of soldiers. Similarly it would be beneficial for researchers to think about how quantitative projects in the military as in many large organizations are considered more scientific, as more legitimate ways gain access and obtain funding. Thus, even if one wants to make a contribution to the armed forces, even critically, this may dictate (at least partially) the methods chosen for gathering data: for instance, quantitative tools may be more persuasive in regard to studying inequity in the military.

Reflexivity in analysis

A rather extensive scholarly literature has been published about data analysis in both the quantitative and qualitative traditions. In terms of reflexivity the idea is to explicitly think about how theories “create” certain facts or actors. In other words, the challenge is to think about the deeper assumptions of the analytical frameworks wielded. An excellent introduction to issues of reflexivity in research is Becker’s (1998) monograph whose subtitle is “How to Think about Research While You’re Doing It.” His argument is that there are various means we can use in order to be both more creative and more critical of our analyses. These include the purposive creation of imagery to guide research, for example thinking about the military as composed of social movements led by charismatic leaders or as a constant assembly of ad-hoc units like high-tech companies. Also the development of concepts for organizing findings (for instance, going outside our disciplines to literature, art or cultural studies for the concepts they use to organize their material) may be conducive to improve one’s creativity and reflective thinking. The same applies to converting one’s line of reasoning (such as thinking not about what the findings tell us about the question we have asked but what questions the findings can answer). What is common to all of his suggestions is that they necessitate a constant reflection about research.

Specifically, researchers may want to take into account the following kinds of issues (Brewer 2000: 132–133). First, the wider relevance of the setting and the topic for the kinds of analytical

lenses one chooses to use. Once this has been clarified one can move on to asking about how empirical generalizations are made: is the setting or population representative of a wider class of phenomena? Or, is the setting a case study framed within an exploratory study or aimed at theoretical innovation? Second, researchers may pay attention to those parts of the topic that have been left unresearched, discussing why these choices have been made and what implications follow from these decisions for the research findings. This can lead to discussing negative cases falling outside the general patterns and categories employed to structure the findings. Third, it is important to make clear the grounds on which the categorization system that has been used to interpret the data is developed. This should enable one to identify clearly whether this is an indigenous one used by respondents themselves, or an analyst-constructed one, and, if the latter, making explicit the grounds which support this view. Finally, and this will relate to the next section, it makes sense to discuss rival explanations and alternative ways of organizing the data (see Chapter 26 on theory development).

My experience may be instructive in this regard. When I began to analyze my data I used a combination of categorical and narrative analyses. I both categorized the data in my field notes and focused on a few key interviews that seemed to me especially revelatory because they appeared to be “rich” in terms of their understandings. The categorization was an emergent one (something similar to creating an index for a book). I created categories for individuals and groups (units or informal small groupings), places and activities, and analytical classes based on my initial interest in cognitive schemas used by troops. The latter especially developed during analysis and I found myself going back to the index of categories to refine it. Moreover, during writing I continuously returned to my field notes to check whether my understanding was supported or not by other data: data elicited in contexts other than formal interviews (observations, casual remarks, or meetings, for instance) or the one found in secondary sources about the IDF and other military establishments for the same reasons. The manner in which I proceeded was a sort of circle of activities – in a sort of hermeneutic circle – that involved a movement between data, theory, provisional interpretation, data, theory, and reinterpretation. While this was a rather solitary endeavor, whenever possible I engaged colleagues in discussion of my categorization.

It is here that issues of validity (the extent to which a test measures what it is supposed to measure) and reliability (the extent to which measurements are repeatable) come up. For instance, in regard to validity, I understood, my kind of research has clear advantages because it permitted me to assemble complementary and overlapping measures or indicators of the same phenomenon. Indeed, many qualitatively minded scholars try to maximize validity, and to a certain extent reliability, through the use of an eclectic mix of research operations. Reliability usually means the ability to replicate the original study using the same research instrument to obtain the same results. Much qualitative work is said to be difficult because there is a lack of standardization. Each social scientist, as it were, is said to write his or her own story, and there is little to guarantee that several social scientists will report the same story. In this sense, approaches like mine are probably not replicable. However, this does not preclude the possibility that researchers report their findings and their methods in a way that can be appraised by other scholars. Thus the issue is less that of replicability but rather that of transparency in providing enough information about the methods of collecting data/evidence so that readers can appraise how the data was collected and assess possible biases.

Two issues I faced may be instructive in terms of the kinds of reflection I embarked on. One focused on whether my membership in the unit was not a sign of methodological weakness? Like the role of any researcher, so my position presented strengths and weaknesses, because, of course, knowledge is always relative to the knower. To be sure, the advantages of participation

in the unit centered on being closest to the way military meanings are “naturally” actualized and my ability to use my native understandings of soldiering as a resource. Yet the major disadvantage, it may be argued, is the lack of proper “distance” from the unit and very basic (emotionally loaded) issues such as masculine identity, citizenship, militarism, or nationhood. Ultimately then the strength of my work was predicated on my ability to achieve a reflexive stance: an ongoing effort not to rely only on introspection but to record, describe, analyze and formulate my findings in a way that would allow them to be critiqued by others.

What methods did I use to achieve this distancing? Briefly, one approach involved an inspection of the language used in the Israeli military to uncover the meanings attached to military service, what Finlay (2002) calls discursive deconstruction. For example, the translation of army terms into English prompted me to face their Hebrew connotations. In this respect, the IDF (like all armies) has its own rather specialized language ranging from formal jargon and acronyms through to vernacular idioms and slang. While I am usually fully bilingual between Hebrew and English, I found myself making extensive efforts to translate and thus to find the exact meanings of terms. The next method of distancing had to do with deliberate attempts to defamiliarize my material. I did this by relating my material to theoretical formulations elicited in other contexts. For example, I linked my data to explanations of small group formation in the American army in Korea and Vietnam and to the Wehrmacht in the Second World War, to feminist examinations of gender identity among policemen, or to the social scientific study of embodiment and of emotions. All of these operations forced me to reflect about my data from a more detached vantage point.

Reflexivity in writing

As part of the emphasis on reflexivity along the whole research process, the chapter now moves on to the writing stage. Atkinson (1990) illustrates how the believability of a research report is not a given that just comes with the data. It is formed through the researcher’s use – *within* an academic text – of a variety of literary devices and narrative strategies that depict rhetorical figures, use descriptive vocabulary to evoke the scenes within which these characters live their lives and which rely on the selection of appropriate illustrative material. Indeed, as Richardson (1990: 131) states “No matter how we stage the text, we – the authors – are doing the staging.” More prescriptively, writing should actually accompany the whole research process. No matter if we call the text accompanying the project a research diary (Hughes 2013) or research journal (Watt 2007), the idea is that by recording things researchers create an objective form that can be then inspected and used for (self)discovery. In other words, one may benefit from looking at writing as a method of reflection and inquiry that constantly accompanies any empirical study.

Writing during research

One way to reflect on writing is to think more systematically about the kinds of texts created during research. Hughes (2013) distinguishes four types of notes while doing research: *observational notes* that are essentially descriptive of an encounter or setting and contain as little interpretation as possible but as reliable as one can construct them; *methodological notes* for reflecting on the methodological aspects of research and the researcher’s actions in undertaking an interview, observation and so forth (for example, thinking about how an interview went or what was one’s role within it); *theoretical notes* about initial explanations of what the data is telling you; and *analytic memos* where one tries to bring several inferences together such as reviewing the theoretical notes and beginning to see recurrent themes in the data or initial attempts to link analysis to the literature in a field. Personally, as in all my research projects, I keep a chronological journal and

a host of reflective notes within one text to which I later add transcriptions of taped interviews. What I found important is that the very act of writing already forced me to be much more explicit not only in regard to descriptions but also my implicit biases and thoughts. The added advantage here is that writing involves – especially for younger scholars – constant exercises in creating texts that often ease the final writing of the final product.

The final text

In considering the design of the final text (a book, article or report, for instance) disciplinary differences are prominent. With the turn to reflexivity, especially in disciplines producing ethnographies, has come a greater openness to experimentation in textual strategies, narrative devices and modes of presentation of research data (Richardson 1990). Ellis and Bochner (1996: 30) comment that using creative genres of writing in the social sciences can help mobilize social action or evoke participatory experiences through imagination and storytelling. In regard to the military it is true that at least some of our subjects may read what we say so that we must balance the critical distance we create with creating spaces within our texts for the subjects to speak back (Gusterson 1997). In my ethnography of the Israeli infantry battalion, providing the voices of the soldiers was also important in order to let readers evaluate the inferences I was drawing from them. At the same time, reflection about textual experimentations should not be limited to qualitative projects. It can also refer to questions of how to display data – such as through using investigational charts, diagrams, photos, or idea maps – other than narrative that innovatively allow readers easy access to the descriptive or analytical parts of the argument (Watt 2007: 95).

I have always looked for good models in writing. Such models from writings about the military include, for instance, Griffin's (2010) use of the actual documents used by US counterinsurgency forces in Iraq and Afghanistan as part of the Human Terrain System; Schirmer's (1998) integration of organizational charts and photographs into her ethnography of the Guatemalan military; or Rubinstein's (2008) depictions of insignia worn by peacekeepers. In my ethnography, I experimented textually by interweaving the analytical chapters with interludes that included definitions from military dictionaries, a letter the battalion commander wrote after a deployment or excerpts from personal observations in the field.

Readerships

The manner by which we construct our texts is directly related to our imagined readerships. For most psychologists textual choices are relatively easy since they have very few degrees of freedom in the articles they pen. When I wrote about my military experience I found myself writing for a plurality of audiences but with only one text. I imagined addressing three readerships: fellow social scientists interested in the military (most prominently sociologists, social-psychologists and anthropologists), scholars interested in “things military,” and a vague category of “concerned” Israelis. This mix of audiences was difficult to handle since each group, I thought, had different expectation about analysis and approach. For fellow social scientists I offered an ethnography using concepts from cognitive anthropology. Moreover, because much of military sociology and social-psychology are dominated by quantitatively oriented researchers, I added methodological appendices to my ethnography (and was roundly criticized by one anthropological reader for being too apologetic). For scholars and generalists interested in “things military,” I extended an in-depth study of one of the prime examples of military units – a combat battalion – but, in contrast to most texts about the military which are written from the point of view of senior commanders, I brought in the voices of ordinary soldiers and

junior officers. Finally, for concerned Israelis I was advancing an analysis of a central institution in our society and which has figured prominently in the lives of many of its Jewish citizens. Indeed, this was a period when scholars in the humanities and social sciences were preoccupied with deconstructing Israeli militarism.

Having said that, however, addressing a multiple readership is probably easier in a book rather than via an article published in a specific journal. When writing for a journal, then, it is useful to look at the journal's web site to understand who the intended audience is. This may considerably aid scholars in formulating the problem and methods accordingly.

Conclusion: Collaborative reflexivity

This chapter explained that reflexivity in research – thinking about and discussing how we create knowledge – implies a range of issues covering all stages of a project: choosing a topic, gaining access to the military, gathering and creating data, analyzing it, and finally writing a publishable or reportable text. While reflexivity has not been a key feature of research into the military it can provide means to think critically and innovatively about studies, be they qualitative or quantitative. Reflexivity seems to be of especial importance in regard to the military because it is a central institution in most societies, continues to receive significant amounts of material and non-material resources and above all is “the” organization charged with the use of legitimate, if sometimes contested, use of organized violence.

Perhaps it is fitting to end this chapter with a plea for more collective team research, which has a built-in potential for a significant measure of reflexivity. Such collaborative research is one in which the findings or arguments of one scholar are continually challenged by other team members or by informants. The advantage of such designs lies in examining personal responses and interpersonal dynamics, opening-up for discussion unconscious motivations and implicit biases among researchers; empower others to contribute or even join forces; evaluate the whole research process, method and outcomes; and enable public scrutiny of the integrity of the research project (Finlay 2002: 225). Such groups can take a variety of formal or informal forms such as cooperative research groups, pairs of researchers from diverse disciplines, graduate students led by a senior researcher or various one-off seminars or meetings to appraise a project. I have had quite successful experiences with such projects as joining an Austrian cultural studies scholar in research into the Japanese armed forces, heading teams led by another senior researcher and myself with graduate students in studying the Israeli military or informal study circles of about 15 individuals that regularly met every three weeks to discuss ongoing academic projects about the military. Above all these cooperative endeavors carry the following message: embrace the social aspect of research and explicitly use interactions among team members on your way towards becoming reflective practitioners (Argyris and Schon 1996: 157) of the social scientific study of the military.

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