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ETHICAL DILEMMAS IN QUALITATIVE RESEARCH WITH MARGINALIZED COMMUNITIES

ABSTRACT

Qualitative research conducted in communities at risk of social exclusion raises complex ethical, epistemological, and methodological challenges that extend beyond formal procedural compliance. This article critically reflects on such challenges, drawing on the authors' long-term research experience with people with intellectual disabilities and women engaged in sex work, as well as on existing methodological literature. Rather than presenting a standard empirical report, the text develops an essay-based reflection on the relational, contextual, and emotionally embedded nature of qualitative inquiry in stigmatized settings. The article argues that ethical research practice should be understood as an ongoing, situated process of negotiation rather than a fixed set of rules. Key tensions emerge around informed consent, participant vulnerability, researcher positionality, emotional engagement in fieldwork, and the boundaries of confidentiality and disclosure. These issues are amplified in contexts where participants are subject to stigma, institutional dependency, or social invisibility. The discussion is structured around four interrelated dimensions: linguistic sensitivity in constructing research categories, barriers to accessing marginalized communities, the emotional labor embedded in fieldwork, and tensions between confidentiality and scientific transparency. The analysis highlights how methodological decisions are deeply intertwined with ethical consequences and how researchers inevitably participate in co-constructing the social realities they study. Finally, the article proposes a set of methodological and ethical orientations for conducting qualitative research in such contexts, emphasizing reflexivity, relational ethics, flexible research design, and participatory engagement. While grounded in studies on intellectual disability and sex work, the conclusions are applicable to a broader range of marginalized populations and contribute to ongoing debates on ethical qualitative inquiry.

Keywords

Qualitative research; Research ethics; Social marginalization; Reflexivity; Vulnerable groups.

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1. Introduction

Qualitative research in contexts of social marginalization increasingly requires not only methodological competence, but also sustained ethical sensitivity. Standard procedural frameworks—such as informed consent, anonymization, and institutional approval—remain necessary, yet are insufficient to address the complexity of fieldwork in communities experiencing exclusion and stigma. Ethical practice therefore emerges as an ongoing, situated process of negotiation embedded in relationships, power asymmetries, and field conditions (Nowicka, 2005; Huysamen & Sanders, 2021; McCracken, 2020).

As shown in previous studies on intellectual disability and sex work (Niedbalski, 2013; Ślęzak, 2019; Ślęzak, 2023), research in such contexts often involves deep immersion in participants' lifeworlds, where boundaries between research activity and social engagement become blurred. This raises recurring issues of trust-building, emotional involvement, and the ways in which the field shapes the researcher's perceptions of participants. It also highlights questions of accountability and the limits of representation in highly sensitive settings.

The article therefore addresses key ethical and methodological challenges in research on socially marginalized communities, including trust, emotional context, researcher reflexivity, and boundary management. Drawing on our own fieldwork experiences, we reflect on situations in which the researcher becomes entangled in participants' social worlds, illustrating the persistent tension between methodological rigor, ethical responsibility, and the complexities of lived field relations.

2. Theoretical Framework

Contemporary debates on research ethics emphasize autonomy, beneficence, confidentiality, and non-maleficence (Babbie, 2006; Angrosino, 2010). However, in qualitative research with marginalized populations, these principles are difficult to operationalize in a linear manner. Ethical dilemmas are not exceptional but constitutive of the research process (McCracken, 2020).

A relational ethics perspective shifts attention from abstract rules toward situated interactions between researchers and participants. Ethical responsibility extends beyond formal consent to include ongoing attentiveness to vulnerability, emotional safety, and the consequences of representation (Irvine, 2012).

Reflexivity becomes a central epistemological tool. Researchers are not neutral observers but active co-producers of knowledge whose positionality and emotions shape interpretation (Flick, 2010; Konecki, 2000). As Berger and Luckmann (1983) argue, scientific discourse itself co-constructs social reality, influencing how marginalization is understood and reproduced.

Methodologically, this study integrates interpretive literature review, autoethnographic meta-reflection, and comparative case analysis (Somekh & Lewin, 2005), allowing ethical issues to be examined as situated practices rather than abstract principles.

3. Critical Discussion: Key Ethical and Methodological Tensions

3.1 Linguistic Sensitivity and Conceptual Framing

Language constitutes the first layer of ethical decision-making. In studies on intellectual disability, the lack of definitional consensus—stemming from divergent theoretical frameworks—creates conceptual ambiguity and may complicate research design (Niedbalski, 2016). While such discrepancies can sometimes prompt further analysis, they more often act as constraints. Definitions, measurement tools, and scales that normatively assess intellectual functioning reflect dominant scientific paradigms and shape social perceptions of individuals with intellectual disabilities (Barnes & Mercer, 2008). As Zakrzewska-Manterys (2010) notes, ostensibly “objective” scientific indicators can foster a form of scientific aura that promotes labeling and exclusion.

Similar tensions emerge in research on sex work, where the choice of terminology (e.g., “prostitution” versus “sex work”) invokes radically different universes of meaning and implies distinct normative and political assumptions (Dziuban & Ratecka, 2017; Ślęzak, 2019). The choice of words not only affects the interpretation of the phenomenon but also participants’ willingness to engage in research, while simultaneously revealing the researcher’s assumptions and biases. As Berger and Luckmann (1983) emphasize, language does not merely describe reality but actively constructs it. Consequently, conceptual choices become both methodological and ethical acts, influencing how participants are perceived and how they perceive the research encounter.

3.2 Access and Participant Recruitment

Access to marginalized communities, such as individuals with intellectual disabilities and female sex workers, is shaped by distrust, internal diversity, and prior experiences of stigmatization (Flick, 2010; Lofland et al., 2007). These groups rarely form homogeneous entities; rather, they are characterized by internal divisions, differing experiences, and diverse perspectives. In the case of sex workers, such differences may relate not only to working conditions or types of services provided, but also to attitudes toward sex work, preferences regarding legal frameworks, and future aspirations. While this complexity enhances the analytical value of the topic, it also generates significant methodological and ethical challenges (Babbie, 2006).

Researchers are often perceived as external actors associated with institutions that provide limited tangible benefits to these communities. This distrust is largely rooted in prior experiences with research and media, which may have been viewed as extractive, superficial, or ethically questionable. As a result, community members may attribute hidden motives to “outsiders” and approach them with caution, particularly in the context of isolation and the need to protect their privacy.

As Archibald and Munce (2015) argue, recruitment in qualitative research requires sustained relational engagement rather than merely procedural outreach. In this sense, trust-building is not a preliminary step but an ongoing methodological process.

Initial interactions are frequently marked by distance and uncertainty, requiring researchers to demonstrate sensitivity, transparency, and long-term commitment. This is especially important given that some participants perceive previous research as having brought little improvement to their everyday lives.

Access is also shaped by broader institutional conditions. Ethical review procedures, while essential for safeguarding participants, may constrain methodological flexibility and at times distance researchers from field realities (Whitney, 2016; Israel, 2021; Irvine, 2012). Consequently, conducting research in these contexts requires navigating the internal heterogeneity of the communities, their distrust toward external actors, and the institutional frameworks that structure the research process.

3.3 Emotional Embeddedness of Fieldwork

Fieldwork in stigmatized and marginalized contexts is characterized by significant emotional labor on both sides of the research relationship. Researchers are often confronted with narratives of exclusion, violence, dependency, and resilience, which may evoke empathy, discomfort, uncertainty, and moral tension (Kacperczyk, 1999). These emotional dynamics are not limited to a single phase of the study but can emerge throughout the research process—from initial contact and data collection to interpretation and publication.

The form and intensity of emotional engagement may vary depending on the research setting. In interactions with individuals with intellectual disabilities, emotional responses may include compassion, but also feelings of insecurity or disorientation, particularly in unfamiliar environments marked by unpredictability and limited initial understanding of social cues. In other cases, such as interviews with female sex workers, emotional labor often intensifies when participants recount difficult life experiences, including those related not only to sex work but also to personal relationships or experiences of violence. These situations may generate a sense of powerlessness on the part of the researcher, who is often limited to offering empathy or indicating possible avenues of support. Additional tension may arise when participants explicitly address stigma and question the researcher's capacity to understand their experiences beyond stereotypical frames, making the management of trust and communication particularly demanding.

Rather than being treated solely as methodological interference, such emotions can serve as important interpretive resources when subject to critical reflection (Konecki, 2000). Cooley's (1909) concept of empathic introspection underscores how emotional engagement may deepen analytical insight and support a more nuanced understanding of social phenomena. Close interaction with participants enables the researcher to access meanings and mechanisms that might otherwise remain obscured.

At the same time, the literature highlights the need for reflexivity in managing emotional involvement. While emotional proximity may enhance ethical sensitivity and relational depth (Walmsley & Johnson, 2003), uncontrolled engagement can lead to over-identification, diminished analytical distance, or selective interpretation (Kubinowski, 2010).

Conversely, avoiding emotional engagement altogether may result in psychological distancing and a loss of valuable insight (Chomczyński, 2006). Unprocessed or unacknowledged emotions may also inadvertently shape data interpretation and conclusions.

In this sense, emotional engagement should be understood as an integral but carefully managed component of qualitative research in stigmatized contexts—one that requires ongoing reflexive attention in order to balance empathy with analytical rigor.

3.4 Confidentiality and the Limits of Disclosure

Confidentiality in research with marginalized and stigmatized communities is particularly complex, especially in small or closely connected groups where indirect identification may remain possible even after anonymization (Dalton & McVilly, 2004). Participants in such contexts typically expect strict protection due to potential social, familial, or institutional consequences. This is especially evident among individuals with non-visible intellectual disabilities, who often conceal their diagnosis to avoid stigma and discrimination (Hasson-Ohayon et al., 2014; Niedbalski, 2018), as well as among women engaged in sex work, many of whom employ extensive strategies to hide their activities from others.

As a result, the researcher's responsibility for confidentiality extends far beyond the technical process of anonymizing data. It requires careful, ongoing decisions about how information is collected, interpreted, and ultimately presented. In practice, this may involve ensuring that interview materials are sufficiently anonymized, consulting participants about the use of their statements, or allowing them to review and modify excerpts that could risk revealing their identity. Decisions about data archiving or sharing further intensify these concerns and often require explicit, informed consent.

These challenges highlight a broader ethical tension between protecting participants and maintaining scientific transparency. In some cases, safeguarding anonymity may necessitate limiting contextual detail, restricting the scope of reported findings, or withholding certain data altogether. Such decisions can affect the depth and perceived reliability of the analysis, yet remain essential for minimizing potential harm (Dobson, 2008).

Importantly, informed consent alone does not absolve the researcher of responsibility for participants' well-being. Ethical research in these contexts involves continuous, reflexive judgment regarding what information can be used, how it should be represented, and whether its inclusion may pose risks. Consequently, working with stigmatized populations requires navigating a series of complex, ethically sensitive decisions, where the protection of participants must remain a central priority, even at the expense of analytical completeness.

4. Methodological Contributions and Implication

The analysis demonstrates that ethical challenges are not external constraints but intrinsic components of qualitative research design. Methodology and ethics are therefore inseparable.

Three implications emerge. First, qualitative research in marginalized contexts requires flexible and adaptive designs, as standardized procedures may fail to capture the complexity of lived experience (Silverman, 2007).

Second, reflexivity should be treated as a core methodological principle rather than an auxiliary practice. Systematic reflection on positionality, emotions, and decision-making enhances transparency and interpretive validity (Nowicka, 2005).

Third, participatory and dialogical approaches can partially reduce power asymmetries. Even limited forms of participant involvement—such as feedback on interpretations—align with participatory principles described by Wyka (1993) and can strengthen ethical legitimacy and analytical depth.

Autoethnographic reflection further enables critical examination of how researcher involvement shapes data production, although it introduces subjectivity that must be triangulated with other sources.

5. Final Considerations

Qualitative research in contexts of social exclusion requires ethics to be understood as a relational and ongoing practice rather than a fixed set of procedures. Ethical responsibility extends across the entire research process—from design, through data collection, to analysis and dissemination (Rancew-Sikora & Cymbrowski, 2016). This is especially important in fieldwork involving access to personal and sometimes intimate aspects of participants' lives, which requires respect for autonomy, privacy, and control over disclosure (Flick, 2010).

In practice, this generates persistent tensions between access and protection, transparency and confidentiality, emotional engagement and analytical distance, as well as rigor and care. Such dilemmas are not resolved through fixed rules but require continuous negotiation in the field.

Research is also inherently co-productive, as interactions with participants shape meanings and social realities (Nowicka, 2005). Ethical responsibility therefore extends beyond data collection to interpretation and publication. Even anonymised data may carry risks of indirect identification in small or recognisable groups (Dalton & McVilly, 2004), requiring careful handling in reporting.

Emotional engagement, common in close-contact research, can support interpretation when critically reflected upon (Konecki, 2000), but also requires reflexive control to avoid bias or over-identification (Walmsley & Johnson, 2003). At the same time, researchers have limited control over how findings are used after publication, which may lead to reinterpretation or misuse beyond original intentions (Dobson, 2008).

Ultimately, qualitative inquiry in marginalised contexts should be seen as relational engagement requiring methodological flexibility, ethical sensitivity, and epistemological humility. These tensions remain unresolved but demand continuous reflection.

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