

RESEARCH REPORTS

Revisiting 'insiders' and 'outsiders' as social researchers

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1. Introduction

When I discussed my research proposal for a doctoral degree with a few senior academics at a South African university, some of them thought that I should not conduct my own research interviews. The reason for this view lay in the following: I wanted to enter the mining sector and interview male workers on fatherhood. I am, however, a white female with relatively high formal educational levels who is fluent in only Afrikaans and English. Differences in race, language, gender, educational levels and class between the miners and myself would seem to make it difficult for me to conduct any meaningful social research. If this argument were taken to the extreme, however, it would mean that currently I could only do meaningful social research on white, educated, Afrikaans-speaking, married women, who happen to have two pre-school children and live in the Gauteng area (a province in South Africa). The latter statement is, of course, absurd and I believe it was also not the intention of the concerns raised with my research proposal that I should only restrict myself to such cases. However, the absurdity of the above statement does bring to the fore an underlying question: 'When are you an insider and when are you an outsider in social research?' Or, put in a somewhat cruder way: 'Who should (may?) do research on whom?'

The insider versus outsider debate is, of course, not new in social research. Kikumura (1998:p.140-141) sums it up as follows:

On the one hand, advocates for the outsider perspective generally argue that access to authentic knowledge is more obtainable because of the objectivity and scientific detachment with which one can approach one's investigation as a nonmember of the group. On the other hand, proponents of the insider perspective claim that group membership provides special insight into matters (otherwise obscure to others) based on one's knowledge of the language and one's intuitive sensitivity and empathy and understanding of the culture and its people.

However, the author continues the debate by citing Robert Merton with agreement: 'We no longer ask whether it is the Insider or the Outsider who has

monopolistic or privileged access to social truth; instead, we begin to consider their distinctive and interactive roles in the process of truth seeking'. I believe that my experience of senior academics doubting the wisdom of me doing my own interviews merits a new look at the insider/outsider debate in the South African context.

2. How can the terms insiders and outsiders be understood?

The status of the social researcher as 'outsider' or 'insider' is neither static nor one-dimensional. To be an insider or an outsider is a fluid status. As a social researcher you may initially be an outsider to a particular group, but as you spend more time with them, you become more of an insider. The latter is often the case when using participant observation as a social research method. What is more, you may be an outsider regarding certain aspects of a person's life, but not others. This can be illustrated by as follows. Two people are co-workers. They do the same job, belong to the same trade union, and consider each other as friends. However, they speak different languages at home and they have an age difference of thirty years. These two people may therefore feel like insiders to each other at work, but in their respective households the other would be considered an outsider. References to insiders and outsiders in this paper should therefore not be taken in any absolute sense. These concepts should be understood as operating on a continuum, and a particular researcher will shift between the different roles associated with being an insider and an outsider. At times one can even expect the roles of insider and outsider to overlap. Kikumura (1998:p.142) for example comments that when writing her own family history, 'In many ways, I was simultaneously an outsider as well as an insider'. The intricacies of these two terms therefore necessitate that one look closely at the way in which the terms insiders and outsiders may be understood.

The conversations on my research proposal mentioned above took place in a particular setting, where there is great sensitivity to the way in which research is approached. These sensitivities have to do with power relations – who should speak for whom. More importantly, such sensitivities relate to how social research was sometimes practiced in the past. The conversations also took place in South Africa, with a colonial past that was replaced by the infamous apartheid system where inequality was based on race. Within such a setting we are obliged to undertake research in an ethical and responsible manner.

When 'insiders' and 'outsiders' are discussed with relation to research, these concepts can be understood within three contexts. Firstly, insiders and outsiders can be understood in the context of *power*. Inclusion versus exclusion is at stake here (Bailey 1994 & Stanfield 1994). The researcher is the one with power; the researched is the one without power. When the relationship of power is examined historically, the one with power was often white and male. It is therefore not surprising that the issue of who should speak for whom and the power play this involves, is often encountered in feminist debates (compare

Hassim & Walker 2002:p.80f; Nelson 1997:p.124f and Russell 1995:p.95-97). A great sensitivity evolved amongst researchers as they became more aware of the inequality in power between themselves and those they studied. Burawoy (1991:p.5) adds a practical voice to this debate when he observes: 'Following recent trends in anthropology, we too are sensitive to inequalities of power between participant and observer. But being sensitive to power inequality does not remove it'. This does not imply that those being researched are without power. Informants have power in how they present themselves as well as in what they say and do not say. There is, however, inequality of power as researchers are the ones who write the papers, articles and books, even if those they studied had an opportunity to comment on the researchers' written work (See Bartunek & Louis [1996] for ways in which those being studied can team up with those studying them [insiders with outsiders] to do research.)

Secondly, insiders and outsiders can also be understood in the context of *knowledge*. The insider is perceived as the one with 'inside knowledge' which the outsider does not have. On the subject of knowledge Flick (1998:p.59-61) distinguishes between different roles that can be occupied in research, namely *stranger*, *visitor*, *initiate* and *insider*. The role taken here will depend on the strangeness or familiarity with which the researcher approaches those being studied. The lack of knowledge of a particular vernacular often places a researcher firmly as an outsider at the onset of the research (*cf.* Adésinà 2002).

The third way in which the insider/outsider constructs can be understood is found in the field of anthropology. In classical anthropology the researcher approached those being studied as an outsider in the majority of cases. Pike coined the terms 'etic' and 'emic' in 1954, and Harris further elaborated on them (More details on the development of these terms can be found in Headland, Pike & Harris (1990). Lett (1990:p.130-131) explains these two terms as follows:

Emic constructs are accounts, descriptions, and analyses expressed in terms of the conceptual schemes and categories regarded as meaningful and appropriate by the native members of the culture whose beliefs and behaviors are being studied... Etic constructs are accounts, descriptions, and analyses expressed in terms of the conceptual schemes and categories regarded as meaningful and appropriate by the community of scientific observers.

The emic point of view is accordingly associated with that of the insider, and the etic point of view with the outsider. However, Pike is quoted by Lett (1990:p.131) as saying: 'the insider can learn to analyze like an outsider'. The etic account is here implied to be superior in terms of the purposes of research, although it is acknowledged that the etic account also has an emic origin. An important factor in this debate is to recognise that '[t]he goal of research is to obtain both emic and etic knowledge'. The latter statement is related to Burawoy's (1991:p.2-5) view that in social research we cannot be 'neutral outsider[s]', and that social science cannot be 'reduced to a dialogue between

insider and outsider aimed at mutual self-understanding'. In social research we want to seek 'causal explanation' and we want to achieve 'understanding'.

In sum, when insiders and outsiders are under discussion, power, knowledge, and the self-understanding of those being studied along with the researcher's analysis of them are relevant. At the same time it should be recognised that the positions taken in relation to these three constructs are fluid.

3. Selected South African studies

When reporting on social research, authors normally explain to their readers why a certain methodology was followed. Decisions are made in every study, and it is the practice to explain why these decisions were taken. One may even say that authors *need* to justify the different routes taken by them in their respective studies. Some authors pay a lot of attention to this aspect of their work, whilst others merely mention it in a few words. The length of the entire published work and the sensitive nature, or not, of the social research obviously contribute to the attention given to methodological issues. Some authors also reflect and explain (directly or indirectly) their views on being an outsider or insider in the specific study. My aim is to highlight some of the decisions taken and the justifications offered in selected South African studies. They are only a selection and many other studies that provide insightful examples of outsiders' journeys in research could have been included here, for example, Hansen (2003), Jones (1990), Marks (2001) and Marks (2003).

In what follows I will first look at the research of Dianne Russell, in which very specific decisions were made regarding who should interview whom. The use of knowledgeable fieldworkers is then examined by focussing on the work of Belinda Bozzoli with Mmantho Nkotsoe; Dunbar Moodie together with Vivienne Ndatshe, as well as Jacklyn Cock and her fieldworker. Spiegel & Mehlwana's work in the Western Cape as well as Anne Mager's work regarding oral (aural) history in the Eastern Cape are then considered together, because these studies demonstrate similar limitations regarding knowledgeable fieldworkers/researchers. Lastly, Paul Stewart's research in the mining industry as a participant observer is examined.

3.1 We cannot do research because we are outsiders...?

A study by Russell (1995:p.95-97) on the long-term effects of incestuous abuse on women contains a very conscious decision to confine her study to white women. Russell (a researcher from the USA) came to South Africa in 1991. She intended to include women from all races in her study, but changed her mind along the way. She describes in some detail how discussions in feminist and women's movements made her sensitive to the view that white people cannot speak on behalf of black people: 'White researchers, they [black women at a conference in Durban] said, should start conducting research on the problems

among whites and leave black people alone'. She cites similar arguments from a conference in Nigeria, and also mentions that these views are not uncommon in the United States, England and Germany. She concludes her argument by referring to views from a working class community which did not want to be researched based on the class divisions between themselves and researchers. She does not follow through on this argument, but simply says: 'I believe that the concern about the race, gender, and social class of researchers in relation to race, gender, and social class of the communities in which they conduct their investigations, is likely to increase in the near future'.

Russell's views can easily be related to the concept of understanding the role of a researcher as an outsider in relation to power. The researcher is perceived as the one with power who speaks on behalf of those without power. I have empathy with those communities who do not want outsiders to speak on their behalf, as experience may have taught them that there is an excellent chance that an outsider researcher may misrepresent them (possibly even with a hidden agenda for doing so), especially if South African history is taken into account. It is interesting to me, though, that Russell does not once mention that she felt uneasy about interviewing white women from South Africa. Did she not consider herself, a North American academic, also in a position of power with respect to the white interviewees? Is the power of race indeed that strong that it can transcend all other differences? I do not see any *singular* 'sisterhood' amongst all white women, just as there is no *singular* 'sisterhood' amongst all black women (*cf.* Hassim & Walker 1992:p.79-80). Moreover, there may be some 'sisterhoods' amongst women that cut across different races. Be that as it may, Russell's argument boils down to the view that she felt herself too much of an outsider to do research on black South African women, but did not feel the same concern with regard to white South African women. In Russell's study, the vantage point of an insider is seen to be of such importance in order to do meaningful research, that research as an outsider (in terms of race) is abandoned.

3.2 We can do better research if other people do our interviews...?

In this section, three well-known South African studies are discussed as examples of how the help of insiders is used to conduct interviews. In these studies the advantages of insiders are also deemed of great importance. All three authors state that their research would not have revealed the same depth and insight if insiders had not been used to conduct all, or part of, the interviews.

Bozzoli (1991) overcomes the problems Russell raises with relation to outsiders by relying on an interviewer. The specific interviewer, Mmantho Nkotsoe, has an interesting mix of characteristics for being perceived an outsider and insider:

Now, of course, she was a University-trained historian and sociologist. But to the women she was interviewing ... she was almost a kinswoman, a young girl, a child to some, who wanted to know the stories of the past. Thus, what to positivists might seem to be Mmantho's weakness (her subjective involvement in the lives of the informants, and their perception of her as having a particular meaning in their lives) proved to be her greatest strength' (Bozzoli 1991:p.6).

Because of Nkotsoe's high formal educational level (especially when compared to those being studied), one would expect the power inequality to come to the fore. Yet in this particular setting, her young age compared to that of the respondents (in their late seventies and older), gives her far less power (emic account, see above). The intricacies of power are clearly displayed here. Bozzoli (1991:p.9) remarks: 'She combines, therefore, the roles of learned authority, whose questions must be answered, and an ignorant junior, who must be told about reality'.

Nkotsoe's role as an insider/outsider in relation to the inside knowledge she possesses is equally interesting:

Mmantho herself brings particular characteristics to bear upon the situation. The fact that she is 'a girl from Mabeskraal, the nearby village' is perhaps the most important of these - the focus on Phokeng was selected at an early stage in the study because of Mmantho's ability to call upon common understandings between herself and her interviewees from this particular place ... This means that what is taken for granted between Mmantho and her interviewee is often of as much significance as what is regarded as of unusual and extraordinary value by both of them (Bozzoli 1991:p.8).

The interviews therefore have a unique character because Nkotsoe could draw on common understandings between herself and the interviewees. However, misunderstandings also occurred when she was assumed to understand things she did not, or where she made incorrect assumptions. The fluidity of her insider/outsider status in relation to knowledge is thus clearly illustrated here. Some of the interviewees were also more open and accepting of her as an insider than others.

One of the striking methodological aspects of this work is, however, the point that Bozzoli did not have any direct contact with those being interviewed. At first glance, it might be said that Nkotsoe was responsible for the understanding of the life world of those being studied, while Bozzoli concerned herself with the 'causal explanation' to the 'scientific community'. Further reflection, however, would take into consideration that Bozzoli would not have been able to make any causal explanations without a certain level of understanding. Nevertheless, Bozzoli looked at the transcripts as an *outsider*. In this particular methodology one therefore has the advantages of an insider (to a certain degree), namely Nkotsoe, who understands and shares certain life experiences (being black, Tswana etc.) with the interviewees, and the advantages of an outsider, Bozzoli, who not only notices that which the insider finds interesting and extraordinary, but also observes what she takes for granted. This study therefore benefited from both the insider's and the outsider's perspectives.

A comparable scenario presents itself in the work of Dunbar Moodie and Vivienne Ndatshe (1994:p.xiv):

Vivienne Ndatshe, who is from Pondoland and whose father had been a mine worker, came from Durban, where she is a domestic servant, to conduct life histories in Grahams-town for Meredith [Dunbar's wife]. Before returning to Durban, she went home to Pondoland for a month, and, since I still had the Hewlett-Mellon faculty development funds and Ms. Ndatshe was interested, I suggested she collect life histories from ex-miners in the countryside. I gave her several pages of interview protocols, mostly about strikes and other events in the 1930s and 1940s. She sent me forty extraordinary life histories that transformed my understanding of life on the mines and started us on a collaborative research effort that continues to this day.

Here we have a woman who comes from the same region as the interviewees, she shares a racial category and a common language with them, and her father was also a mineworker. An interesting factor here is that Ndatshe was a domestic worker; we can therefore assume that she does not have tertiary qualifications. The interviewer here has an inside view, because she has so many shared experiences with the interviewees. Although she must have commanded the normal power relations by asking the questions, there is far less power inequality between herself and the interviewees than one normally finds with social research interviews. Moodie is the outsider here, the one that gives account to the scientific community. Here too, as is the case with the Bozzoli and Nkotsoe study, one finds the advantage of combining insider and outsider roles. Moodie himself, though, conducted numerous interviews with miners over an extended period of time. For this reason his position as insider and outsider in this research was fluid.

Cock (1989:p.170) decided to rely on the vantage point of insiders in her research on domestic workers and their relationships with their employers in the late 1970s:

Experience in the pilot study revealed that a considerable degree of rapport was necessary for a satisfactory interview on the subjects covered, especially those which involved attitudes and emotions. This rapport was established in most cases largely because both interviewers are themselves part of the culture they were exploring. The fifty domestic workers who were studied in depth were interviewed by my fieldworker, who is a black, Xhosa-speaking woman, from this area, with little formal education, and herself a part-time domestic worker. She was chosen because of these attributes. It was felt that a more educated person might have inhibited the respondents. Her personal qualities of warmth and compassion went a long way to establish trust in her respondents. Indeed, the insight she has elicited on extremely delicate and thorny topics is the most effective tribute to her skill in the interview situation...Similarly the writer is part of the cultural world of the employers interviewed. I am white, middle-class, of 1820 Settler descent and have lived most of my life in the eastern Cape. These attributes contributed to overcoming initial suspicion. It is doubtful whether an 'outsider' would have achieved the same results.

Cock (1980) made use of the insider perspective in an interesting manner. She was simultaneously an insider in terms of a subpopulation of the respondents and an outsider to the remaining subpopulation of the group. Given the histori-

cal context of this particular study, namely the late 1970s in apartheid South Africa, this methodology proved particularly successful.

The preceding discussion has attempted to show that the different characteristics and circumstances relating to insiders can work to the advantage of the research. On the other hand, one should not concentrate so much on the advantages of the insider role that the advantages of the outsider role are not recognised. Bozzoli, Moodie and Cock took the role of outsider by providing us with causal explanations within their respective research areas. The advantages of insiders are underlined in all three of these studies. The advantages of outsiders should, however, not be overlooked.

3.3 What?! Insiders have problems as well?

Insiders can provide major insight into communities that would not have been achieved by outsiders on their own. The work of senior researcher Spiegel together with (then) junior researcher Mehlwana (1997:p.17) illustrates, however, that insiders cannot always obtain all the information they need, precisely because of their insider status:

A further difficulty that Mehlwana faced in the process of conducting this research derives precisely from our subjects' sense of close identification with him as a Xhosa-speaking South African, of his being what is described in the literature as a 'native researcher'.

Spiegel & Mehlwana then comment: 'the boundaries of the "field" were not clearly evident because I share some of my informants' life experiences: indeed the "field" could be seen to enter and encompass my own home' (Mehlwana, unpublished field report).

In particular, this proved a problem in Mehlwana's discussions with women about issues conventionally not discussed between Xhosa men and women, and which a male 'outsider' such as Spiegel might have had great success engaging with, precisely because he could have hidden behind a cloak of ignorance as to appropriate norms.

A similar situation is encountered in the historical study of gender relations in the Ciskei by Anne Mager (1999:p.13):

Sometimes I was guided by the sense of rural politics and social history of my friend Siphon Mungezeleli. This did not mean that Siphon, a young activist and graduate of history, was willing to ask older people about relations between women and men. These questions, he said, would have to be posed by me, a white woman. Siphon's distancing served to remind me of my position: my sex and colour were simultaneously enabling and disabling as a researcher. Nor was this unusual. Some colleagues were even more blunt. 'Whites simply don't get it; and they never will', they charged. Young activists once exhorted prospective interviewees to protect themselves against white researchers. 'Ningam niki! Ningam niki!' ('Don't give it to her!') they repeated as I walked away with a group of elderly people, clutching a tape recorder. The shortcomings of my efforts will no doubt be obvious to many, and responses to this book will surely reflect these views, among others. I hope that this will spur on scholars with deep knowledge of the region to undertake research and

help to advance our understanding of people and place. I also hope that they will share with me the view that no one owns the past.

In both of the above cases cultural norms and taboos made it difficult, perhaps impossible, for the insiders to ask certain questions. Insider status can therefore at times be a hindrance when trying to understand issues from the subject's point of view. In the studies of both Mager, and Spiegel & Mehlwana it was noted that an outsider could have access to information because he/she does not need to adhere to the norms of the community (for example, younger people will out of respect not ask elders about the relation between men and women).

I have tried to show in this section that, although understandable, it is regrettable that some people are excluded from research topics based on the researcher's perception of being too much of an outsider. The advantage of collaborating with other researchers who are closer insiders than ourselves was highlighted. The limits of insiders were, however, also evident in the two cited cases. Throughout there was an attempt to show that the focus of the outsider as researcher was still present in these collaborations.

It is, however, interesting to note that the focus of research between Russell's work and all the other studies was different. In the case of Bozzoli, Moodie, Spiegel and Mager the 'other' was being studied (Cock's research also contained the 'other' in the subpopulation of the domestic workers). The women of Phokeng, black miners, kinship and migrancy in Khayelitsha and the history of Ciskei all constituted communities to which the above researchers did not belong; they were outsiders by default. Russell's research is different though, she focuses on incest, which is found in all communities. Russell could restrict her study to white women only, but the other researchers did not have that option. They were challenged as outsiders because their research could only be done as outsiders.

4. Should we not accept our outsider status and use it to our advantage?

One of the major advantages of being an outsider is quite clearly that you look at things with 'new' eyes and therefore notice things that insiders take for granted or do not notice. This is, of course, not a new insight (see, for example, Hassim & Walker 1992:p.82), but perhaps one that has not been fully explored in the South African context up till now.

Often nowadays one encounters great expectations that young academics from diverse backgrounds will add insight to the social sciences in South Africa. These expectations are, however, sometimes biased towards the potential of researchers as *insiders*. To take crude examples: Tswanas can study Tswanas and be sensitive to the intricacies of the language nuances, or graduates who were children of domestic workers can now study domestic workers with a greater background of shared experience. These examples of researchers

studying their 'own' or their 'roots' are of course very exiting, but researchers should also be encouraged to study those communities which are not their 'own'. For example: a young male Zulu researcher should also be encouraged to study changing career patterns of white English females. The vantage point of the outsider and the potential of new insights and understanding this may bring, should not be overlooked.

Mager makes one of the most important observations in her research when she sees that outsiders, solely because they are outsiders, have various disadvantages when conducting research, but they also have various advantages. One of the major disadvantages of being an outsider is almost self-evident: an outsider does not always have enough shared experiences with those being researched and therefore does not always understand or notice all the subtleties and variances at stake. Mager, who is an outsider to her researched community, made an effort to observe basic practices such as paying respect to the chief before interviewing the community and learning the language of the people she interviewed. She made use of key people within the community to provide her with deeper understanding. She therefore embarked on the journey from being an outsider to being an insider.

This brings me to the point that not enough use is made of the advantage point of being an outsider. The way an outsider is treated by the researched community, the way in which the outsider is approached as an outsider by them, the information given or not given to the outsider, the feelings portrayed or not portrayed towards outsiders all tell a story of their own. A once-off visit to a community can serve to make this experience of being an outsider only partly relevant. In the journey of the researcher from being an outsider to becoming more of an insider, a lot is revealed about those being studied. Initial information or attitudes compared to later information or attitudes should be keenly studied and reflected on in order for the research to benefit from the vantage point of the outsider.

This is a journey that can never be undertaken by an insider, but it is a journey that requires constant awareness and reflection by the outsider in order to maximise the value of the insights obtained. An example of such a journey can be found in the work of Stewart (2000), where he was a participant observer as a worker in a mine. This entailed living in a single sex hostel and working underground with a team of workers for a few weeks. Stewart was the only white male in the research team and amongst the workers:

The researchers sought to observe, to interview, to understand. On entry into the field' of compound and mine researchers rather were observed, interviewed and were sought to be understood. In my case there was a further inversion. In academic halls I was, for a while, Simon Ramapepe's mentor: on the mine I was, initially, his mentee (Stewart 2000:p.8).

Stewart (2000:p.9-10) further explains how people kept on asking them what the researchers were doing at the mine, and how he had had to change his answer to this question in order to be understood by fellow workers. He demon-

strates how he took up the language of the mineworkers in order to obtain some degree of acceptance. Only then did workers start to communicate in meaningful ways with them as researchers. This journey of the outsider as displayed in Stewart's study provides a tremendous amount of insight into the mine-worker's life.

Those researchers with the luxury of obtaining enough money and time to conduct participant observation are often very aware of their outsider status, and of how this gradually changes. I want to argue that these dynamics should be employed with more vigour when conducting in-depth interviews (and when making use of other research methods) as well. The way in which one is treated initially compared to later; the effect of different translators/interpreters or no translators/interpreters and so on, all tell a tale that is from the vantage point of the outsider. It is of course common practice to give rich detail on the setting and circumstances when reporting on qualitative research. I want to argue, though, that this setting should also be described in the language of outsiders and insiders.

8. Conclusion

Social research can be approached in many ways. Regardless of the methodology employed, advantages and disadvantages arising from the specific methodology will be present. In qualitative research (such as in-depth interviews and participant observation) the characteristics of the person or persons in the field are of particular importance. These characteristics will determine to a certain degree how easily information can be obtained. There is at times a tendency to give preference to the insider's ability to obtain meaningful information. I support this view wholeheartedly, but this should not obscure the fact that the outsider can obtain different, yet valuable information precisely because of his/her outsider status.

The outsider's journey to obtaining information should be reflected upon, and should also be used as a source of information in itself. Making sense of the outsider's journey can be done more satisfactorily if the outsider spends a substantial amount of time with the people being researched (in other words, one interview with a respondent will probably not be enough). To answer therefore who is 'in' in doing research on whom: if you are out, you are in and if you are in, you are in.

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