

Contested Categories—Issues at the Intersection of Development and Forced Migration Studies

Online Workshop, 04-05 October 2021

INTRODUCTION

Aggregating information is a mundane procedure in research processes. Clustering, labelling and categorising are basic tools researchers use to structure data and order information to systematically make sense of ‘the world out there’. This process is crucial for reaching higher abstraction levels and creating broader meanings of the data generated. However, research categories always emerge in a specific context and time; therefore, it is not surprising that they are often contested by diverging perspectives, revisited and replaced. Hence, categories seldom endure longer periods of time. This workshop addressed the critique of categories and the debates about them in development research and considered their relevance and utility for forced migration studies (FMS). For this purpose, three critically discussed categories in recent years were used as examples: ‘Global South and Global North’, ‘new actors—self-empowerment and emancipation of marginalised groups’, and ‘digitalisation’. For better contextualisation, the workshop was accompanied by a keynote lecture on categorisations in development and FMS.

DISCUSSIONS AND RESULTS

Panel 1 was about categories of ‘**Global South and North: Between practicability and restrictions**’ with contributions from Tingirtu Gebretsadik Tekl (Assistant Professor, Jigjiga University), Dr Sebastian Haug (Researcher, German Institute of Development and Sustainability, IDOS) and Dr Franzisca Zanker (Senior Researcher, Arnold-Bergstraesser-Institute). Dr Rose Jaji (Senior Researcher, IDOS) was the moderator.

In her input, Franzisca Zanker pointed to the dilemma of the restrictive nature of labels such as ‘Global South’ and ‘Global North’ on the one hand and the need to work with existing categories to address unequal power relations on the other. Therefore, she suggested that researchers use established categories as a starting point for more critical research agendas that strengthen local knowledge production in FMS in the Global South. These reform efforts need to go hand in hand with facilitated access for researchers from the Global South to hitherto Northern-dominated research, publication and funding schemes.

Afterwards, Tingirtu Gebretsadik Tekl explained how South–North binaries reduce the contextual diversity and lived realities in the Global South. He argued that ‘Global South’ as a singular label is used to describe a wide range of research contexts; therefore, it mostly fails to grasp the complexities of a given situation. Furthermore, he pointed out that researchers from the Global North often miss the point when trying to determine relevant problems for governments and interest groups in the Global South, whereas researchers from the Global South with relevant contextual knowledges are widely underrepresented.

The third panellist, Sebastian Haug, elaborated on the problems scholars face when it comes to terminological precision: Various sub-disciplines use a great variety of terms and categories to describe very different phenomena. For example, the label 'Global South' has mostly been used to designate poor or socio-economically marginalised parts of the world but also to qualify a space of resistance against neoliberal capitalism and global hegemonic power. He, therefore, pleaded for a scientific practice that is more explicit about definitions, concepts and categories when using them as analytical lenses. Also, categories must be applied consistently in any research field, and researchers should always consider the analytical, emotional and/or political implications of the terminology they employ.

In the subsequent debate, it became clear that a critical usage of labels like 'Global South' and 'Global North' can have emancipatory potential, allowing us to detach it further from geographical notions. This way, Global South could be anywhere since it would create a space of resistance against hegemonic knowledge, a space that is underrepresented in research. The label can then become a tool to raise scholars' awareness of unequal power relations and underrepresented local and global actors. Also, Global South, as an analytical frame, can challenge notions that are taken for granted, such as 'nationality' or 'citizenship', which strongly influence research on movement and forced migration. In conclusion of the discussion, it was agreed that researchers should encourage a reflective approach where the terminology is considered not only as a tool for expression but also as empirical research material that tells us something about the respective author's or researcher's understanding of the world.

For better contextualisation, the workshop was accompanied by a keynote address entitled 'Social science vs myth, policy, and law: Moving beyond and within methodological nationalism, forced migration, and the global south' by Dr Nathalie Williams (Associate Professor, University of Washington) and an ensuing plenary discussion moderated by Dr Jörn Grävingholt (Senior Researcher, IDOS).

Nathalie Williams gave a pointed keynote address on the historical development of methodological nationalism and its impact on terminologies in social sciences. The concept of borders is often perceived as a naturally given demarcation line within which states need to exist and protect their territory and to enable governments to organise their societies. Williams referred to this idea as 'the myth of methodological nationalism' because borders are social constructs rooted in a long history of racism and myths of Europe's cultural and moral superiority. The idea of people belonging to a certain space and others being intruders or outsiders solidified through the creation of the nation-state. Nowadays, international organisations and supranational governance structures reinforce the notion of borders and nations by defining—and therefore creating—the world we live in. Additionally, the creation of 'the Other' is not only reiterated by the Global North but non-hegemonic countries from the Global South also perpetuate established terminologies.

Two similar myths are the ideas of 'development' and of 'Global South'. Williams proposed a critical reading of history that showed how cultural differences in demographic, social and economic patterns created the idea that some cultures are further behind in a supposedly ideal development curve. This evolutionary and Eurocentric understanding of history resulted in a terminology that splits the world into 'first, second and third world', suggesting a hegemony of the European and North American countries. Williams argued that 'Global South' is nothing but a new term that still suggests different levels of development. However, Global South has become a label that allows for a research perspective that sheds light on an increased agency of the South. Williams also questioned the subversive potential of the label Global South.

Even though borders and ideas of development and Global South are myths or social constructs, they have devastating impacts on the life of migrants and asylum seekers. Illegal immigrants question the construct of borders through their own bodies and lives since they do not abide by the rule of methodological nationalism. For scholars in FMS, it is therefore indispensable to reflect on the historical development of analytical categories and definitions and the social construction of established concepts in order to pursue a less biased research agenda. Additionally, internal migration is an exemplary phenomenon that forces scholars to think outside the box of borders because although both show very similar dynamics, one involves crossing a border, and the other does not.

The following debate pointed to the challenge of navigating the need for categorisations based on abstraction to better comprehend, grasp and address wider socio-political phenomena while maintaining analytical precision for relevant details. In summary, it encouraged a more nuanced and coherent application of categorisations that also addresses the contextual and historical baggage of terminologies, thereby encouraging reflexivity and a consideration of the implications of one's work.

Panel 2 addressed '**New Actors in Development Research and FMS: Towards an Emancipation of Old Hierarchies?**'. It consisted of contributions by Dr Alexandre Apsan Frediani (Principal Researcher, International Institute for Environment and Development), Dr Kate Pincock (Researcher, Overseas Development Institute) and Dr Zeynep Sahin-Mencütek (Senior Researcher, Bonn International Centre for Conflict Studies) and was moderated by Merlin Flaig (Researcher, IDOS).

In a first input, Alexandre Frediani elaborated on his work in development planning, where he noticed the importance of the descriptive terms used for project localities. Citizens have contested terms like 'slums' or 'favelas' because they feel that this denies their agency. Therefore, it is necessary to create participatory research projects and design outlines and objectives with the local residents. According to Frediani, equitable partnerships need to build on four pillars: First, the local academic institutions and staff must be supported and paid equally to end asymmetries within a project group. Second, solidarity and trust relationships with communities and grassroots organisations need to be strengthened. Third, it is indispensable to perceive the research project as a learning journey for all participants and not to forestall the outcome. Finally, the outcome has to be of emancipatory value. Researchers should ask themselves whose protagonism and recognition is being put into action by the project. However, the barriers of short-term budgeting and framing issues by funding organisations create obstacles to equitable partnerships.

Kate Pincock shared her experiences from collaborations with refugees as researchers. Refugee-led organisations and projects made it possible to challenge established categories and notions such as 'researcher' and 'researched' or 'insider' and 'outsider'. While there is great potential of empowerment and new scientific findings, it is nonetheless important to reflect on the specific positionality of the refugee researcher. Refugees are often labelled as 'the others' and therefore struggle with breaking out of this outsider position. Also, due to the specific situation of refugees, it is difficult to ensure non-precarious working conditions and to reduce asymmetrical power relations between refugee researchers and less precarious researchers without migration backgrounds.

Finally, Zeynep Sahin Mencütek provided insights on her experiences with refugee-led community organisations and their implication in the reception, protection and integration of migrants at a local, national and transnational level. An important result from Sahin Mencütek's research was that refugee-led organisations are often tokens at the supranational and global level, whereas crucial refugee-refugee support spaces have been created on the local community level. The idea

of refugees only being receivers of aid has been called into question. The political and legal context, as well as migration regimes of the receiving country, play a crucial role in the possibilities and restrictions of refugee-led engagement. Thus, the precarity of refugees who face repatriation in many countries impacts the organisational structures and their stability. Sahin Mencütek found that refugee-led business organisations flourish faster than advocacy organisations because their contribution to society is not as much contested in most contexts. Additionally, refugees with socio-economic capital are more likely to engage in refugee-led organisations.

In the debate that followed, all three panellists underlined the lack of institutional support and funding for equitable working conditions, support that would contribute to reducing power asymmetries between local experts and refugees and less precariously employed, established researchers. What has proven to be important in those research contexts is a critical reflection and awareness of one's own positionality and honesty about employment structures. A final point that should not be forgotten when dealing with participatory approaches in research is that to think of refugees as protagonists, one must also consider other identity criteria, such as gender, class, age, ethnicity/race, religion or health.

Panel 3 dealt with the topic '**Digitalisation: A New Global Context beyond Compass Points**'. It included contributions from Dr Amanda Alencar (Associate Professor, Erasmus University Rotterdam), Dr Koen Leurs (Assistant Professor, University of Utrecht) and Dr Petra Molnar (Lawyer and Researcher, Refugee Law Lab). Dr Charles Martin-Shields (Senior Researcher, IDOS) moderated the session. The panel complemented the previous debates on specific categories with the cross-cutting issue of digitalisation and addressed diverse aspects of how digital tools and opportunities shape and challenge categorisations in FMS.

In his input, Koen Leurs underlined that research on migration and technologies allows us to better understand the political, socio-economic, cultural and ideological conditions under which forced migrants come about. Therefore, he outlined emerging debates in the interdisciplinary field of 'Digital Migration Studies' and their impact on today's perception of migration. Digitalisation and Big Data and Artificial Intelligence, in particular, raise new ontological and epistemological questions for researchers. While these issues open up possibilities for innovative research methods, they also confront them with ethical concerns. The availability of precise mapping tools, frequent updates and a nearly global coverage facilitates access and allows researchers to increase the sample size and precision of their work. However, while systematic methodological approaches to quantitative digital FMS are lacking, pilot studies have already shown the categorical fetishism that Big Data is reinforcing in FMS. Also, this can lead to a further entrenchment of biases and inequity in global knowledge production, where forced migrants are reduced to data points for predictive analytics or biometric surveillance without considering the impact this might have on human rights. Although digitalisation enables new research possibilities for FMS, this finding indicates that it is ever more important to unhitch research from restrictive categorical thinking.

Amanda Paz Alencar addressed the micro level of digitalisation in FSM. She presented her insights from a qualitative research project with Venezuelan refugees in northern Brazil. The research aim was to explore how a WhatsApp group can enhance digital connectivity and agency of refugees, as they often encounter difficulties in accessing digital services. It turned out that digital connectivity can be conducive to preserving refugees' basic needs as it can provide legal, health, social and job assistance. In addition, it can create spaces of freedom or empowerment in refugee camps. By documenting the use of WhatsApp in a refugee group, the research team contributed to finding ways of how digital tools and connectivity can enhance refugee agency and support them in breaking gridlocked stereotypes about refugees.

The third panellist, Petra Molnar, provided the audience with another perspective on digitalisation by looking at the EU's migration management surveillance regime. Molnar underlined that digital surveillance technologies such as facial recognition, video surveillance and vast personal data collection are at the heart of national and international border strategies. Given the fact that the peripheral areas of borders are mostly low tax spaces with poor infrastructure, it seems incomprehensible that nation states afford massive surveillance systems in areas where basic needs, such as access to clean water, are often not met. As highlighted by the panellist, economic interests and the surveillance industry are key factors in the development of migration surveillance regimes in the EU that need to be studied further.

The panellists' interventions and the subsequent discussion on digitalisation and forced migration shed light on the different conditions of digital spaces on the one hand and engineered offline spaces on the other. Both are performative of refugee's identities and positionalities and confront researchers with new methodological and ethical challenges in the process of knowledge production in FMS. On the one hand, digital tools such as social media might create new spaces of safety and empowerment for refugees. At the same time, social media platforms might be used as top-down government tools that hinder emancipatory agency. Also, increasingly securitised, so-called smart borders or other artificial intelligence technologies can facilitate deportations and state surveillance, which poses a threat to the rights of migrants. Therefore, digitalisation as a new cross-cutting phenomenon entails both challenges and opportunities in FMS that future engagements and research projects need to consider.

CONCLUSION

The content discussed by the keynote speaker, the panellists and the participants emphasised the restrictive effects of inaccurate, inconsistently applied categorisations on the one hand and the possible, but limited, potentials of emancipatory self-attributions to strengthen marginalised and context-specific knowledge on the other. To meet these nuanced demands, a scientific practice is necessary that explicitly and consistently applies concepts, categorisations and definitions and critically engages with the history of the emergence of the respective categorisations. This requires, among other things, a stronger inclusion of people from countries of the Global South and a re-thinking of the attribution of researchers and researched to arrive at more differentiated research results. Also, in the discussions, a recurring challenge for research in forced migration concerns the conditions of research funding programmes. Funding guidelines usually limit the possibilities for designing participatory and partnership-based research projects, which hold promising potential for innovative research methods and new results.

Merlin Flaig and Hanna-Maria Paul

Project info

Forced Migration and Refugee Studies: Networking and Knowledge Transfer

The cooperation project “Forced Migration and Refugee Studies: Networking and Knowledge Transfer” (FFVT) aims to strengthen interdisciplinary forced migration and refugee research in Germany. To this end, the project, which is funded by the German Federal Ministry of Education and Research (BMBF), brings together research on migration, development, conflict and violence, climate change, health, governance and human rights and other topics. In this way, FFVT supports the networking of researchers and institutes working in all relevant research fields dealing with forced migration. To provide young academics with teaching and training opportunities in Forced Migration and Refugee Studies, it plans to establish study and graduate programmes. Furthermore, FFVT promotes the internationalisation of German research activities further and, therefore, offers a global fellowship programme, among other things. The dialogue between academia, practitioners, the media and politicians is another key element of its work. FFVT is to contribute to establishing a sustainable infrastructure for research on Forced Migration and Refugee Studies in Germany to facilitate excellent academic work in this field.

FFVT is jointly run by the Bonn International Centre for Conflict Studies (BICC), the Centre for Human Rights Erlangen- Nuremberg (CHREN, University of Erlangen Nuremberg), the German Institute of Development and Sustainability (IDOS, Bonn) and the Institute for Migration Research and Intercultural Studies (IMIS, University of Osnabrück).

Please note that the content provided is a summary of the points discussed during the event. They do not purport to reflect the opinions or views of FFVT, its members or funders.

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