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Negotiating access to research sites and participants within an African context: The case of Cameroon

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Abstract

This article argues that localizing access – a general ethical principle – is a workable strategy that can be used in approaching participants in qualitative research across disciplines and in coping with respective institutional practices in order to collect meaningful data. This article is based on the autobiographical, lived experiences of the authors during the period of their data collection in Cameroon in 2013 and 2015, by the second and first author, respectively. Therefore, generalization across a broader context is somewhat restricted, and a closer analysis of specific cultural and situational realities is needed. The article addresses two main objectives, that is, to identify factors that inhibit and factors that facilitate access to individuals and institutions. To this end, the article employs self-reflexivity and provides valuable explanations on the workability of applying skills of negotiating access in a local cultural context.

Keywords

Fieldwork experiences, localization, negotiation, qualitative research, self-reflexivity

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Introduction

Literature on qualitative research has extensively portrayed the importance of observing ethical issues in conducting high-quality research (Frankfort-Nachmias and Nachmias, 1992; Lofland and Lofland, 1995; Lofland et al., 2006; Marshall and Rossman, 1999; Rossman and Rallis, 1998; Sanjari et al., 2014). Ethics, in research, refers to the 'application of moral rules and professional codes of conduct to the collection, analysis, reporting, and publication of information about research subjects' (Marshall and Rossman, 1999: 566). This implies that at every stage in the research process there are ethical codes of conduct or guidelines to be observed. These guidelines include, but are not limited to, informed consent, reciprocity, respect, promises, anonymity and confidentiality, risk assessment and privacy (see Habib, 2014; Halai, 2006; Hoeyer et al., 2005; Hogg, 2011; Iain, 2008; Sanjari et al., 2014; Stevens, 2013).

Based on our experiences as doctoral candidates enrolled in different European universities and countries, we observed that, in principle, the institutions have policies on research ethics for their researchers to conform to while conducting a research study. However, at these individual universities different practices are followed to ensure that researchers strictly follow and apply ethical principles in their research. In the case of the first author, research ethics committees are responsible for approving ethical clearance prior to data collection, whereas in the case of the second author, it is the responsibility of the students and/or the supervisors to ensure that ethical guidelines prescribed by the university are followed. Regardless of whose responsibility it is, the application of ethical guidance during research is non-negotiable. However, researchers face several ethical challenges as they interact with research participants during data collection (Sanjari et al., 2014; Warusznski, 2002). This necessitates the development of clear guidelines regarding conduct during fieldwork (Sanjari et al., 2014).

Although there are universal ethical guidelines, concerns remain whether these guidelines can be universally applied (Mollet, 2011; Upvall and Hashwari, 2001). Research has shown that there are differences in the application of universal ethical principles between developed and developing countries and culturally diverse groups (Upvall and Hashwari, 2001). This argument is based on the premise that there are global disparities in the perceptions and lifestyles of research subjects (Benatar, 2002: 1131) as the research is being conducted in different environments (Mollet, 2011). This has led some critics to question whether the application of universal ethical guidelines in developing countries is useful or symbolic (Mollet, 2011). Their application in specific local contexts may also be different because of political, economic, social and cultural factors.

In developing countries, research on ethical issues has mostly been conducted in clinical studies (see, for example, Dawson and Kass, 2005; Houghton et al., 2010; Hyder and Wali, 2006; Killawi et al., 2014; McRae et al., 2013; Upvall and Hashwani, 2001) and business (Laryea and Hughes, 2011). In medical studies, for example, Upvall and Hashwani (2001) compared the processes of obtaining informed consent, to access research subjects in Swaziland and Pakistan and highlighted challenges in the process. The challenges they expressed included the identification of gatekeepers: seeking, negotiating, obtaining and explaining to research participants the meaning of informed consent. Within business studies, Laryea and Hughes (2011) examined obstacles and workable strategies in negotiating access into four firms in the UK and Ghana. Their results indicated that using personal contacts and gatekeepers was a strategy to gain access. These authors also noted that the success rate of negotiating access across these firms varied as organizations were hesitant in providing information for security reasons. In this case, providing incentives helped to overcome this concern. Popular incentives included the promise of providing research reports on the case studies conducted and assisting in routine tasks. The authors also: presented general overcoming strategies which they used across situations, including the use of written letters; ensured trust from participants by voluntarily working with them on institutional projects, which served as a means of snowballing and alleviated suspicions of the researchers as being spies/intruders; used several emails, phone calls and follow-ups; respected participants' preferred time/venue for interviews; and provided constant assurance of participants' anonymity and confidentiality.

Apart from these studies, surprisingly, very few studies have examined the application of universal ethical guidelines in social science studies in different African contexts. Research ethics, therefore, is a relatively new area of research, particularly in the social sciences in this context. In this article, we attempt to fill this gap in social science research on ethics within an African context, with a focus on access. As African-born PhD students studying at universities in developed countries and doing research on our country of origin, we have identified the scarcity of articles which adequately capture ethical challenges faced by social science researchers doing fieldwork and data collection in Africa. In this article, our focus is on the application of 'access' (to research sites and participants), which is an example of an ethical code of conduct in research. This article focuses on the African context of Cameroon, taking into consideration the local realities. Our goals, therefore, are to document factors which hinder and factors which facilitate access to participants and research sites in Cameroon.

This article is relevant to qualitative researchers engaged in fieldwork and data collection in an African context. It exposes the researchers to lived experiences of the authors, and contextual and situational challenges related to access to participants and research sites, and provides clues which can assist in maximizing access to individuals and institutions. The article is very timely as a source of reference, to the increasing number of African students and researchers in the social sciences in Cameroon and abroad who are doing or intend to do fieldwork in Africa. This article will also be beneficial to supervisors, lecturers of research methodology and ethics committees in both developed and developing countries, as it provides them with an understanding of some of the challenges faced by their international students and/or supervisees, especially those from developing countries in general and African countries in particular. However, it is important for readers of this article to be aware of cultural sensitivities which are informed by contextual factors.

Methodology

This article draws on the experiences of the authors in accessing participants during fieldwork and data collection (interviews and documents) in 2013 and 2015 in Cameroon for their PhD studies on higher-education policy in Cameroon. Both authors are Cameroonians, enrolled for PhD studies in developed countries – the UK and Finland, respectively. The data for this article are based on the reflections of the authors' experiences during data collection in Cameroon. Reflection is 'the practice of periodically stepping back to ponder the meaning of what has recently transpired to ourselves and to others in our immediate environment' (Raelin, 2002: 66). Reflective practice focuses on learning processes which examine and question our assumptions and the premises guiding our action (Raelin, 2002). Reflecting on our experiences of struggles, dilemmas, uncertainties or breakthroughs may allow us to learn from our experiences and could be done through journaling (Amulya, 2004). Based on the importance of journaling during data collection, the authors of this article kept journals in which they recorded their data collection processes (for example, who was talked to? where? when? what happened? what reflections were made from what happened?). In other words, such data were obtained through encounters with participants. It recorded what worked, what did not work, and decisions made to be included in the methodology chapter of their respective dissertations. During numerous chats, both authors realized that there were similarities and also differences in their experiences during their respective data collection in Cameroon, and the idea to write an article on the topic was born.

With regard to data used in this article, the first step was to formulate semi-structured theme questions which were answered by both authors. The theme questions focused on the ethical issues prior to data collection, application of ethical issues during data collection with a focus on access to participants and institutions, informed consent, anonymity and confidentiality, risk assessment, respect and reciprocity. Both authors provided in writing their answers to the formulated questions, and thereafter shared and combined their individual written responses for analysis. Owing to the volume of the data, in this article, the focus is solely on the issue of access related to ethics. We employed a thematic analytical approach in ‘identifying, analyzing and reporting’ patterns (Braun and Clarke, 2006: 79). The analysis of the data was first done separately by both authors. Next, we shared and compared the identified themes for commonalities and differences. We then identified and coded common patterns from the individual analysis, which we have integrated in our subsequent discussions. In this discussion, references are made to research literature to support claims made.

Factors that hindered access to research sites and participants

Based on our experiences, analysed through thematic analysis, in this section we focus on the factors which hindered access to research sites and participants in Cameroon. The factors that hindered access are discussed under the following themes: administrative formality and red-tapism; attitudes towards research and lack of research culture; political working environment and participants on security alert; African time syndrome; and official bilingualism vs individual functional fluency. To aid understanding of how these challenges were resolved, specific coping strategies have been integrated into the discussion. In some instances, literature has also been provided to further explain the underpinnings of existing practices.

Administrative formality and red-tapism

Researchers are often requested to obtain research permits to conduct research. Research permits from the relevant national institutions facilitate access to participants. In the case of both authors, the national level was the Ministry of Higher Education, and the institutions were the universities that function under the Ministry of Higher Education. A research permit from the Ministry of Higher Education can facilitate access not only to participants at the Ministry, but can also facilitate access to participants at the institutional levels. This observation is in line with Upvall and Hashwani (2001), who noted that a formal permit or consent granted at the top formal organizational level is enough to gain access at individual institutional levels. Whereas in some university/multinational organizations research permits from the ministry are enough to gain access, in others, access can only be granted by the receiving institution, on the grounds that universities are autonomous and multinationals are independent structures. Obtaining research permits is supposed to be the normal procedure, whereby one applies for a research permit and waits for its approval before data collection commences.

In practice, obtaining a research permit, particularly from university/multinational institutions, was challenging because of the lack of information available on who approves the letters, the duration of time for processing the permits, and how the decision is communicated back to the researcher. Although ‘red tapes’ are important to enhance the representation and accountability of organizations (Bozeman, 1993; Kaufman, 1977), they do pose challenges and uncertainties and can limit access, if other possibilities are not explored. Elizabeth recalled starting this process in June 2013, 3 months prior to her field trip to Cameroon. These letters were posted to the ministry and to five universities. A second set of letters was submitted by a field assistant directly to different institutions. Having had no response, she personally submitted a third set of request letters upon her arrival in Cameroon in October 2013. She was told by all the institutions to carry on with her research (which she did) while waiting for the official research permits. After 2 months of staying in Cameroon, she was told the letters would be posted to her host institution. Joyce’s case was no different. Although she had obtained a research permit from the Ministry of Higher Education while in Cameroon during her field trip because of a connection in the Ministry, obtaining research permits at the universities and multinationals proved difficult. Besides the fact that it is a time-consuming process, especially because the institutions are located in different cities, Joyce was asked to submit two applications to different offices. Despite fulfilling the conditions to acquire a research permit, most institutions, particularly multinationals, ended up not issuing this and, at the time of writing, no feedback has been received from those institutions about the decision on her application.

The authors’ experiences highlight the difficulties in acquiring a research permit, marked by uncertainties and delays, not knowing whether the various local institutions had received the requests, and in the case of postal letters because there was no response acknowledging receipt. The researchers, in such a situation, can be confronted with the dilemma of whether to use other possibilities, such as verbal permission, or to wait endlessly for the official written research permits. The waiting time can be forever. In the case of Elizabeth, only one research permit out of the six she had applied for had been received at the time of writing. In the case of Joyce, out of 14 institutions she had applied to for research permits, only three institutions granted her written permission. Given that researchers usually have very limited time in the field, they can easily be caught up in a lot of red tape which can hinder access to research sites and participants, leading to frustrations and irritations on the part of researchers (Bozeman and Scott, 1992).

To overcome organizational red tape, verbal permission and persuasion were used by both researchers to gain access. However, access based on verbal permits required proper identification by the researchers. The use of proper identification was important because it not only served as a solution to red-tapism in research (Bozeman, 1993; Kanwari, 2015), but also helped to build trust, set expectations and ease understanding. In other words, despite the lack of official written research permits, it was still possible to carry out our individual studies, using verbal permits backed by proper identification and documentation. Documentation – an act of ‘supplying documents or supporting references or records’ (Soma, 2018: 3) – ties in with the adage that ‘if it isn’t written, it does not exist’ (Soma, 2018: 10). Although conducting research without a formal permit may contradict universal research ethics, it is also important to consider different local contexts’ practices and realities. As noted by Upvall and Hashwani (2001), formal approvals (such as written research permits) which are required by western countries are sometimes ‘unrealistic’ in developing countries.

The documents both researchers used constituted copies of the request letters for research permits to the various institutions, national identity cards, a university student card (in the case of Joyce), thesis proposals and interview guides. The request letters for research permits contained information about the purpose of the research, who the authors were, their institutional affiliation, the kind of participants needed, themes to be covered in the interviews, the length of the interviews, and respect for anonymity. The documents served as concrete evidence that the authors were indeed doctoral students on research trips for data for their doctoral theses. It also ensured that the participants did not consider them as ‘spies’ coming from abroad (the UK and Finland) with studies financed by foreign funders that might have raised suspicion. The use of proper identification was, therefore, a strategy used to avoid such suspicion, in addition to overcoming red tape and helping facilitate access to research sites and participants. As observed by Matheson (2007), documentation is part of the fundamental value of an office which embodies norms like subordination to authority and procedural conformity (work ethics).

Another dimension of administrative formality and red-tapism that hindered access to participants was the administrative procedures executed by gatekeepers. By gatekeepers, we mean security guards who grant access to the institutions, and secretaries who grant access to the officials, especially to top officials, including policy-makers, rectors, deans and heads of departments. At these institutions, access to these officials is granted first by a security guard, who questions you on the purpose of your visit and makes sure you conform to the institutional code of conduct, especially when it comes to dress. Sometimes, these formalities were applied on the discretion of the security guards and secretaries. Elizabeth noted how in one instance she was refused entry because she was not wearing ‘proper shoes’ – the same pair of shoes she had worn to other institutions without any issues. To be granted access, although time-consuming and incurring extra cost, Elizabeth had to go back for a change of shoes. Because of this realization, she subsequently carried a spare pair of shoes with her when visiting research sites, just in case she encountered a similar situation.

Administrative formality and red-tapism is complicated by the fact that security guards grant access to the building and not to the officials in the building. Access to the officials is granted through secretaries after filling an appointment form.

The decision to grant audience is made by the official based on the purpose of visit, as indicated on the appointment form. In some cases, the officials decide not to receive the researcher but do not inform the researcher about their decision. In others, the secretaries decide not to present the appointment form to the officials and, unaware, one waits endlessly. In some instances, the officials met the researchers accidently in the waiting room, and new appointments were made between the researchers and the officials. In other situations, owing to the time factor and other commitments, new appointments could not be made. The challenges faced owing to the demands of the gatekeepers are embedded in what Bozeman (1993) described as inadequate comprehension of research underpinnings and of how to exercise their administrative duties; self-aggrandizement and illegitimate functions (perhaps gaining pleasure in unnecessarily stressing individuals/researchers who seek audience from officials in their offices; excess control in institutions; and lack of authority/power boundaries by gatekeepers.

Attitudes towards research and lack of research culture

Another challenge to access was participants' perception about the inability of research results to influence policy and/or change higher-education practices in Cameroon. Some participants were reluctant to grant interviews because, according to them, sharing their thoughts would not change anything, as with previous research. According to the group of participants who held this view, providing data for research through interviews was a waste of time because policies is built on political agendas and decided by top officials. In other words, the scepticism of these participants was a result of the inability of research to inform or influence policy and practice and bring a change. Research at large, and data collection in particular, were therefore seen as the need to meet certification requirements only. As Hague (2012) argued, such experiences necessitated personal judgement and knowledge of the researchers in deciding whether such responses (actions and opinions) were cultural, behavioural or attitudinal, or mere service delivery.

Participants' attitudes towards research and the lack of a research culture not only hindered access but also posed a challenge in maintaining access. Multitasking during interviews was very common. Some participants attended to other visitors during the interview sessions, and some answered calls or made calls. Both authors experienced being sent out in the middle of interviews. Joyce, for instance, recounted that during her interviews at the Ministry of Higher Education, she was sent out of the offices on several occasions by interviewees to permit them to either attend to private telephone calls, colleagues or private guests for official and/or private matters. Elizabeth also recounted being sent out in the middle of interviews for similar reasons as narrated by Joyce. In these situations, maintaining access was difficult because sometimes other people visiting or calling were deemed more important than the researchers in terms of rank, status and age. At other times, the participant had something more to benefit from the call or visit which the interviewer could not provide. In such situations, the interviews were seen as a waste of time and relatively unimportant. Once interviews were interrupted, it was difficult to bring the interviewee to the same line of thought and frame of mind as where things were left. This was, however, overcome by briefing the interviewee on what he/she had said before. In some instances, where applicable, using specific examples that were cited earlier by the interviewee and asking the question again also helped. In some cases, to continue with the interviews, access had to be renegotiated, which sometimes was programmed for a different day. As Liang (2011) noted, 'cultural differences you will more likely hear of today are ironically devoid of "culture" in the traditional sense and refer to differences in scientific perspectives or ideals that are much more general … and much less to do with ethnic stereotypes.' Both authors realize that, during their respective research, cultural differences took more of the traditional approach, rooted in the lack of research culture or indifference towards research. These assumptions from the participants were based on the inability for research to bring about institutional change, originating from political influences on national institutional practices and local individual research conducts.

Political working environment and participants on security alert

Some participants, especially lecturers, thought the topic of research on educational policy had political implications which required politicians to respond. As most officials in Cameroon are appointed by the government, the participants were afraid that participating in the research might put their jobs in a state of jeopardy. As Elizabeth narrated, it was common to hear remarks like, 'I am here to teach, please let me concentrate on that' or 'I would like to go on a peaceful retirement' or 'Do you want to put me in trouble?' Some participants thought that, as lecturers, they were not in the position to grant interviews. To overcome this challenge and maximize access, after failing to convince such potential interviewees that their anonymity would be guaranteed, the authors relied on those who agreed to be interviewed. This, of course, required more time spent on negotiating access than carrying out the actual research. A few participants accepted to be interviewed but refused to be recorded in the fear that the recordings might fall into the wrong hands and cause harm to them on account of their being critical of the system.

The influence of politics on every aspect of working life in Cameroon results in a situation whereby most government workers are on a security alert, questioning every action and the motive behind those actions. This influence of politics also makes research participants afraid of expressing their thoughts and criticizing actions. Subordinates were also afraid to grant interviews for fear of sanctions and falling into the black books of their bosses. This situation can be illustrated with the following example from Elizabeth. Elizabeth recalled how, at the Ministry of Higher Education, one of the participants insisted she would be interviewed only if Elizabeth interviewed her boss first, which she did to overcome the challenge. Once in her boss's office conducting the interview, the subordinate came in and told the superior that Elizabeth wanted to interview her, and she had directed her to him. The superior then instructed her to grant the interview and to look for other documents for Elizabeth. Her boss cautioned, 'when these people come from abroad, give them what they want else they will go back and tarnish the image of this country'.

The above narrative paints a picture of a situation where most people are on alert – where the subordinates do not want to fall in the black books of their bosses, as recounted by Elizabeth above. Joyce also highlighted that some participants showed concerns that if they were identified saying anything in the interviews which contradicted what their superior expected of them, this would have potentially devastating consequences for their careers. Vuban (forthcoming) noted that this has an adverse effect on knowledge production as fundamental truths (realities) are most likely to be hidden from research. The narratives also paint a picture where bosses do not want a poor image to be projected of the country, which cuts across the different institutions (see Elizabeth's narrative above). Similarly, Joyce noted that during her interviews at the Ministry, most officials told her of the importance of protecting the image of Cameroon and encouraged her to uphold the image of the country abroad. The authors of this article acknowledged these experiences as a form of maintaining patriotism. Calhoun (2002) conceptualizes patriotism as globalization's alternative which aims at defending inherited identities and solidarities, such as Cameroon's identity. Some policy-makers also at the Ministry perceived researchers, especially those coming from abroad, as spies who are out to monitor and evaluate the system and expose it to the international community. Some top university officials perceived researchers as government spies who would channel all information back to the government. Some lecturers viewed researchers as spies of the university administrators who would gather information and communicate it to university officials. Thus, at every level, they are on alert – sceptical that any information they give out might be used against them by someone in a superior position. This is because politics is highly central to the nature, structure and operating mechanisms of institutions in Cameroon.

African time syndrome

In identifying this problem, 'African time syndrome', the researchers in their various studies employed the indigenous approach to the study of culture. As noted by Triandis (2000), research on culture can be better studied using the indigenous approach. This approach looks at 'the meaning of concepts in a culture and how such meaning may change across demographics within a given cultural context' (Aneas and Sandín, 2009). The indigenous approach stresses things that are particularistic or unique in a given culture, otherwise known as *emics* (Ægisdóttir et al., 2008). The indigenous approach is relativistic as it studies in depth a local culture and the meaning of constructs without any theoretical imposition on the constructs (Tanaka-Matsumi, 2001). Thus, as observed by Jenkins (2009) in the African context, time is perceived as something that flows backwards. This means there is always so much time and there is no need to hurry with time schedules as events can be carried out much later. This explains time issues with participants which the authors encountered during their respective research. Therefore, it is important to understand 'African time' (Mbiti, 1969: 16), particularly as time caused some access challenges during the authors' individual fieldwork.

'African time' is a term commonly used by people of African origin to refer to the non-respect for scheduled time. By 'African time syndrome', we refer to the inability of participants to respect an appointment time that was agreed upon by the participant and the researcher. This is often attributed to late timing, and to some extent, to the non-respect for the appointment. Some participants gave time they hoped to respect but, because of unforeseen circumstances, could not, and failed to let the researchers know. Others gave appointments with no intention of respecting them. Joyce, for instance, narrated one of the cases where a prospective interviewee gave her an appointment on six consecutive occasions but did not respect any of them. Each time she went to conduct the interview, the interviewee would either give excuses that he is about to have an important meeting and, therefore, needs time to prepare, or that he is tired and needs rest, or that he is not in the mood for granting an interview and would recommend she should return later in the day or the following day. When she did return, the same excuses and recommendations were given. Similarly, Elizabeth recounted a situation whereby a potential interviewer gave her five different appointments without respecting any. Each time Elizabeth went for the interview, his discussion focused on a book he had written and wanted Elizabeth to buy the book. On the fourth visit, Elizabeth bought the book with the hope that the purchase would facilitate access. The fifth appointment was made for the interview, but rather than granting the interview, the interviewee snowballed Elizabeth to his colleague, claiming his colleague was more knowledgeable than him. Such persistent failed appointments by some potential interviewees made the authors of this article conclude that such participants had no intention of respecting their appointments as they found it hard to say so outright (in case of Joyce's narrative) or wished to satisfy their own personal goals (in the case of Elizabeth's). It was also a very common practice for interviews to be conducted 1 to 3 hours after the scheduled time because participants gave appointments and did not respect time. Sometimes after waiting for 1 to 2 hours, appointments were not respected, and were rescheduled several times because some participants were double-booked. Some participants agreed to appointments but then forgot about them, and others had to attend to other pressing issues. The non-respect for time posed a challenge to access because planning multiple interviews in advance was difficult, especially because the focus of both authors' research required interviewing participants from different institutions which were in different regions.

The above-mentioned time-related issues limited our access to the participants as this made later interviewing nearly impossible owing to our unavailability and clashed appointments. We perceive this was because of a lack of professional ethics, a culture of favouritism, being receptive to personal guests during official hours, and connection power – that is, the ability to quickly see officials based on personal relationships with secretaries as well as officials.

Official bilingualism vs individual functional fluency

Colonized simultaneously by France (80%) and Britain (20%) after the defeat of Germany in the First World War, Cameroon adopted both French and English as its official languages at independence and reunification (Ebongue, 2017). In 1960, French Cameroon gained independence from France. British Cameroon gained independence from Britain in 1961, and in the same year, reunited with French Cameroon to form a federal state. The adoption of English and French as the official languages of Cameroon was an attempt to preserve and maintain the colonial legacies of the two Cameroons (Konings, 1999). It is worth stating here that, although Cameroon is bilingual, Cameroonians are not bilingual – only a fraction of the population can communicate in both English and French. In other words, the majority of the population, including the authors of this article, can understand and communicate with functional fluency in only one of the two languages. Thus, the language barrier is also a factor that hindered access.

The language issue as a problem resulted from the fact that, although it is stated in the Cameroon constitution that French and English are the official languages with equal status, French remains the dominant language used in policy documents as well as the language used by most senior administrators, who are, coincidentally and predominantly, Francophones. The dominance of Francophones and the French language resonates in what Ebongue (2017: 325) writes, that 'entire Cameroon operates in French' owing to the presence of more Francophones than Anglophones. Official text documents are written mostly in French, with little or no English versions, owing to the presence of many Francophones governing Anglophone institutions.

Research indicates that cultural challenges exist during research in multilingual contexts, including: communicating with interpreters; reflecting on one's positionality; and issues with the meaning (Crane et al., 2009) of what is said. In line with this, the authors of this article are both from the English-speaking regions of Cameroon and are both proficient in English but not in French. Thus, it was difficult to access participants who were proficient only in French even when they were relevant for the study. For some prospective French-speaking participants, Elizabeth recounted how speaking English was received with anger. They said in French, what can be translated as, 'take your English somewhere else' or 'I do not understand that – your English'. As the topic of both studies was deeply rooted in higher-education policy, accessing information required interaction with both French-speaking and English-speaking participants. Some policy-makers at the Ministry of Higher Education, and senior administrations at the French universities, speak only French, which hindered access for the monolingual researchers. Thus, the inclusion of French-speaking participants was limited only to those who could speak English with fairly functional fluency. The use of French-speaking officials with functional fluency in English was thus a coping strategy to overcome the challenge posed by the authors' low French proficiency.

In addition, most policy documents were written only in French, which made access not only difficult but costly for Elizabeth, who made use of documentary analysis in her thesis. The documents had to be translated for a cost, which was solely and unpreparedly covered by the researcher. Joyce, on the other hand, decided to go for English data only, to bypass translation issues as her data were exclusively based on interviews. She decided to bypass French translation complexities as Xiaoqian (2005: 85) opined that 'translation is a complex process, involving linguistic, cultural and personal factors'. Furthermore, Crane et al. (2009) stressed that to better comprehend research settings, it is important to unravel and unpack 'translation'. This illustrates why the authors, during their research, were sensitive to translation issues.

Factors that facilitated access to research sites and participants

Although the above section on 'factors that hindered access' has simultaneously addressed 'factors that facilitated access', as each specific challenge raised also discussed a corresponding overcoming strategy to ease understanding, this section further elaborates and expands on factors that 'facilitated access'. In this section, we focus and expand on the following themes: use of network, building rapport and connection power; predetermined participants and snowballing; researchers' positionality and the adoption of multiple personalities; and compensation of participants and gatekeepers.

Use of networks, building rapport and connection power

Though Farley (2015) defined networking as '… collecting relationships with interesting or influential people irrespective of the immediate benefit of these relationships', the authors' individual approach to networking was primarily and purposefully 'immediate', to satisfy the demands of access to research participants. Farley's first networking principle, which is 'don't limit your network', was very instrumental to both authors during their fieldwork. For example, during data collection, both authors made use of a range of people in their networks to facilitate access, including their supervisors, field assistants, former lecturers, friends and friends of friends, security guards and secretaries. The signing of letters for research authorization by supervisors and the inclusion of their email and postal addresses on the letters facilitated access as it legitimized the researchers as PhD students enrolled in the institutions they said they were from. Their supervisors' signatures suggested to participants that they were dealing with an institution and not an individual. Having been guided by literature and experiences of research conducted partly in Ghana – another African context (Laryea and Hughes, 2011) – the authors of this article perceived that coming from abroad and being sponsored by foreign bodies would raise suspicions of their missions in Cameroon as participants might think they were spies with a hidden agenda. This means it was likely that participants trusted the institutions more than the researchers. Presenting documents that bore our supervisors' signatures thus facilitated access, as it aided in neutralizing this misconception. This strategy is in line with Laryea and Hughes's (2011) observation that researchers coming from abroad to carry out research in Africa are usually perceived as spies, and therefore access strategies are needed to mitigate this constraint.

Access to participants was also enabled via friends of friends and acquaintances of friends. For example, getting research permits in Cameroon was a huge challenge owing to the lack of clear guidelines and procedures for acquiring them (discussed in the section, Administrative formality and red-tapism). However, because Joyce's acquaintance's father worked at the Ministry of Higher Education, it became easier for her. He not only helped her type the request letter for the research permit addressed to the Minister, but also made sure that the letter was signed the same day. This was a connection which Elizabeth lacked, and faced difficulties because of that.

Security guards and secretaries were also used to facilitate access to participants. However, the challenge was that of building rapport with them. The authors overcame this challenge by employing Buist's (2007) rapport principles including, but not limited to, developing an attractive personality. For instance, in some cases, all it took was having a friendly and honest discussion about who we were and what we were doing in Cameroon. Given that we were based in Europe, most security guards, secretaries and lecturers were cooperative once rapport was established because they also wanted to benefit from our experiences in accessing schools in Europe, whether for themselves, their children or siblings. Both researchers noted that some of these people took their telephone numbers and called when their bosses were around. They advised us on the best time of day to visit the institutions; they called to inform us either to come because the boss was in the office or not to come because the boss had left the office before the planned time of our visit.

The fact that we were based in Europe was a facilitating factor to building our networks and gaining attention, which sometimes also facilitated access to institutions and participants. From field assistants, to friends and some lecturers, the common advice was for us to always mention that we were coming from Europe. Both authors strongly opine that in Cameroon there is the mentality that everything that comes from abroad is good and should be respected, which is an influence of colonialism (Vuban, forthcoming). This also applies to people coming from aboard. In most cases, once it was made known that we had come from Europe, attitudes changed – people became friendlier and interested in what we had to say. Joyce noted that she had used a British accent sometimes when speaking, as a means to gaining access. She noted the reason for this strategy to gain access is based on the respect and preferential treatment of things and people coming from abroad.

Predetermined participants and snowballing

Accessing participants in the field can be made easier with the use of purposive sampling (Patton, 1990: 169). In other words, predetermining your target participants can facilitate access. It is not enough to know that policy-makers, university administrators, lecturers and students will comprise the sample population. In the case of the authors, through a reading of policy documents and other media texts related to our topics, we were able to purposefully determine some of the policy-makers and university administrators to contact for the interviews. Determining the criteria for including participants in a study prior to data collection can facilitate access. For example, when researching education policy, we had to include participants who have a broad knowledge of the development of education policy in Cameroon. Although some of these participants were contacted beforehand, not everyone accepted to be part of the study. Some accepted but even then, because of other commitments, could not take part in the study. The use of purposive sampling, therefore, allows researchers to predetermine participants beforehand, but it does not guarantee their participation in the study.

Snowball sampling allows participants to identify other participants to us who they thought had expertise in the subject and would be willing to share their thoughts and experiences. Tracy (2013) remarked that snowball sampling is the best option used in reaching difficult and inaccessible populations, like senior officials. In using the snowball sampling approach, it was not just enough for the existing participants to identify others, but also to introduce us to the next participants, whether face to face, or via written notes, emails or telephone calls. The process of introduction facilitated access because it built trust between the researcher and the participant, signalling to the next participant that the researcher was not a random person but somebody known in the community. In Cameroon, most people are on the alert and see researchers as spies, as the country struggles with social upheavals in the presence of Muslim terrorist groups like Boko Haram who appear to be normal civilians. Thus, being introduced by someone else clears some doubts. The snowball technique also facilitated access because most participants saw it as a sign of respect, either for their superiors or for their subordinates. For example, in cases where subordinates were asked by their bosses to grant interviews, the subordinates felt important and interpreted it as a recognition of their expertise by their bosses. In the case where it was the subordinate introducing the researcher, it was perceived as a sign of respect and recognition of not just the bosses' expertise but also respect for power and hierarchy. These illustrations tie with Matheson's (2007) notion of bureaucracy, which suggests that bureaucracy leads to the ethos of office, which embodies norms like vocational commitment, subordination to authority and procedural conformity.

In situations where gaining access to participants was difficult owing to the absence of snowballing, both authors were smart enough to mention the names of some prominent interviewees whom they had already interviewed. For example, we would mention *Prof X* or *Dr Y* or *Mr Z* with a senior position to encourage someone of similar rank or junior to participate as well. From our experience, it seems that there is some kind of respect for superiors by subordinates or those of a lower class/rank which is perceived as 'fear of hierarchy', which made us opportunistic in our approach by mentioning the names of top officials, without, of course, undermining the integrity of those in lower ranks. Joyce's use of a friend's father at the ministry in obtaining the minister's consent, mentioned above, is a form of opportunistic sampling technique used in gaining access (Patton, 1990: 179).

Researchers' positionality and the adoption of multiple personalities

Data collection is a process that involves the engagement of the researcher and the participant. The relationship between the researcher and the participant can be complex because of fundamental differences in terms of personalities, power relations, needs, perceptions, biases, age and social status, among others. Merriam et al. (2001) opined that positionality, power and representation are important concepts for exploring the insider/outsider dynamics of a researcher, which have various advantages and disadvantages. Recognizing these differences allowed us to seek ways of approaching and engaging with participants to gain access and collect meaningful data. The participants for both studies comprised policy-makers, university administrators, lecturers and students, all of whom share the differences mentioned. Positionality, according to Merriam et al. (2001), is associated with multiple sociocultural characteristics of a heterogeneous population. Recognizing these differences meant positioning ourselves differently in different situations. To put this bluntly, it sometimes meant adopting multiple positionalities in engaging with the different participants to identify oneself and create a sense of belonging for both the researcher and the participants. The adoption of multiple positionalities can also be understood as the authors' ability to adapt to different situations, which has advantageous attributes (Merriam et al., 2001).

In approaching policy-makers at the ministry and university, the identifying factor was that both authors were Cameroonians and former graduates from one of the universities. The authors recognized that our interaction was taking place in official working environments, with their own codes of conduct (especially in relation to dress code) which should be respected. For example, as Cameroonians, and being females, the authors were aware that women are not allowed into the ministries and universities dressed in trousers and dresses above knee level, or wearing sleeveless or tight-fitting dresses. Therefore, they took efforts to follow that dress code.

Coming from Europe and studying for a PhD can be intimidating to some people, especially to students and even lecturers who are yet to gain their PhDs, thus triggering unequal power relations. Sanjek (1993) described power in research as a situation where those who are researched are oppressed and colonized by the researcher. To counteract this, both authors, therefore, made conscious efforts to maintain a balanced relationship to encourage trust and participation. For example, both authors tried not to appear overdressed, engaged with participants in discussions of everyday life, and sometimes offered lunch and dined at the same restaurants as the participants. Furthermore, both authors gave participants absolute power to make decisions on their preferred venues and time for the interview; however, they did negotiate with them in case of time clashes. The authors were also distant and neutral from the data in order not to intimidate participants or contaminate the data. Mkabela (2005) noted that 'the cultural aspirations, understandings and practices of African indigenous people should position researchers to implement and organize the research process'. Such indigenous practice which both authors respected included the respect of officials and institutional values from an African–Cameroonian standpoint. For example, the authors referred to participants by their titles such as Professor, Dr, Dr/Mrs, Mr/Ms and Sir as a sign of respect rather than by their first names, as is the case in some cultures. Secondly, in dealing with Christian universities, Joyce explained how attending mass services and participating in the worship was a great boost to gain access as it qualified her as a morally upright individual who respected Christian doctrines and was worthy enough to be granted an interview.

We recognized that, although we were gathering data for a specific topic, participants complained of needs ranging from basic security and social needs (Maslow, 1943). As they were battling with these basic needs, they required our attention which, thus, served as a motivation. These needs and struggles were sometimes expressed in the interviews, where participants diverted from the topic of the interview to talk about these issues. For example, in some cases, lecturers were bitter about their working conditions, salary and the management of universities. Students expressed frustration with the learning environment and personal life issues they were dealing with. Both authors understood that such situations present an ethical dilemma of either to continue with the topic of the interview or to stop the interview and listen to the participants' grievances. However, the authors exercised an empathic understanding as suggested by Basch (1983) of the situation by providing listening ears. This provided the participants as a means to literally solve their needs through confidential freedom of self-expression. Hence, even as researchers, we sometimes had to position ourselves as counsellors, and sometimes advised participants on how to handle the situations they were dealing with.

Compensation for participants and gatekeepers

According to Streiner (1990) and Hulley et al. (2001), researchers providing allowances such as time and money while recruiting participants is a great strategy used in obtaining the desired sample size. Although there were differences in the way the authors of this article compensated participants during data collection for their PhD studies, we both agreed that compensation for participants and gatekeepers aided access. Most participants expected to be compensated for their time and efforts. The compensation for participants and gatekeepers served as a motivation to participate and had a tremendous effect in snowballing us to other participants and gatekeepers. In Cameroon, there is a common saying that 'you do not visit somebody empty handed', which ties in with Mkabela's (2005) expectations/conceptualization/procedures of conducting research within an African context. This is even more applicable if a person is coming from abroad. Thus, coming from Europe for research purposes, most people thought our projects were funded, hence it was assumed that we had money and need not be stingy – a common perception most Cameroonians have about those coming from abroad. Satisfying this need increased the likelihood of participants or gatekeepers to be cooperative in recommending prospective participants and/or calling, on their mobile phones, some notable participants who happened to be their colleagues, thereby easing access. For those calls to be made, it was required that we covered the cost. Sometimes, we opted to cover the cost even before the participants or gatekeepers asked, and sometimes the participants requested that such costs be covered.

However, the amount of money given to cover such costs was most often left for the authors to decide. This is because, when the authors determined the amount of money to cover the cost of calls, it was always more than what was spent on the calls.

Some participants also considered compensation as ‘you scratch my back, I scratch your own’. In other words, this means ‘nothing goes for nothing’ and/or ‘a price’ paid for their services. Aware of this assumption, compensation was situationally given depending on the authors’ resources and participants’ preferences. For example, Elizabeth bought gifts which she offered to friends and to some participants she had been in contact with prior to her field trip to Cameroon. Joyce provided an ‘envelope’ to participants which was approved by her department’s ethical committee. An ‘envelope’ was an amount of money put in an envelope and given to individuals as a symbol of acknowledgment for their time and services. This amount varied depending on the position of participants. On another occasion, Joyce was asked to administer an examination in one of the higher teacher training colleges in Cameroon (which is part of a university she visited) as compensation. In some cases, we offered lunch to some participants and gatekeepers, who accepted the offer. Lunches were a way of socializing and bonding with those in the field. As Cameroonians, both authors believed this was a cultural way of showing appreciation and offering compensation to participants for their time and contributions. In line with the views of Pitta et al. (1999: 254), we believe 'culture forms the foundation for ethical behavior and determines what is ethical and what is considered unethical'. Thus, it is difficult to define and consider culture from a universal stance because culture ‘represents the values and patterns of thinking, feeling and acting in an identifiable group. While many nations possess the infrastructure of modern, developed civilization, culture represents how people in the civilization interact with one another’ (Pitta et al., 1999: 242). Based on this assertion, the authors affirmed that compensation ethics, as it is relative to culture, is locally rather than universally defined.

Conclusion

Our article indicates that conducting qualitative research in an African context as well as respecting the universal ethical guidelines, especially in gaining access to research sites and participants, can be a daunting experience. It is frustrating and stressful, and might even scare away some prospective researchers from embarking on it. In this article, we have elaborated on the factors that hinder access to research sites and participants and how these were problematic during our respective fieldwork in Cameroon. In discussing the challenges, we simultaneously integrated coping strategies that were used in overcoming those specific challenges identified. Additionally, in a separate sub-section, we discussed stand-alone general ‘factors that facilitated access’ – factors which are not tied to any specific challenges as these were conscious decisions made prior to data collection informed by our understanding of the local context.

Our experiences highlighted the fact that access to research sites, especially in an African context such as Cameroon, can be very challenging. In this article, we have discussed those challenges in relation to the following: administrative formality and red-tapism; attitudes of participants towards research and lack of research culture; influence of politics on working life; understanding of time; and language issues. However, access was facilitated by: using various people in our network and building rapport; the use of predetermined participants and snowballing; our positionality as researchers; and compensation for participants and gatekeepers. Some of these challenges and coping strategies tie with previous research carried out in Ghana and the UK in the field of business by Laryea and Hughes (2011), and by Upvall and Hashwani (2001) in Swaziland and Pakistan in the medical field. In line with our study, these previous studies, although conducted in different disciplines and contexts, indicate that access is a continuous process of negotiation which requires building rapport and trust and adjusting to new situations and new leads. However, the specific challenges encountered by the authors of this article and the coping strategies employed were deeply rooted in the local cultural context of Cameroon and are based on our understanding, which limits generalizations. Nonetheless, our discussion of these issues is an attempt to start a conversation on an important topic which, surprisingly, has not been given much attention in the current context.

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