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Ethical considerations in qualitative health/psychology research with military populations: Navigating power, vulnerability, and cultural complexity

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ABSTRACT

Qualitative research with military populations presents distinctive ethical challenges that existing bioethics frameworks inadequately address. Military personnel exist within institutional hierarchies where obedience, loyalty, and collective values systematically constrain individual autonomy, creating conditions where traditional concepts of informed consent and voluntary participation become problematic. This paper examines these ethical complexities through reflexive analysis of conducting research within the Australian Defence Force, drawing on fieldwork experiences and sustained clinical engagement with military populations.

Military culture often creates voluntold participation dynamics where formal consent occurs under implicit institutional pressure, making genuine refusal practically impossible despite legal rights to decline. Military socialisation embeds values that prioritise collective benefit over individual choice, complicating interpretations of autonomous decision-making. Institutional gatekeeping introduces layers of approval that may compromise research independence while creating systematic barriers to accessing diverse participant voices. Confidentiality protections are weakened by mandatory reporting requirements and organisational oversight structures. Researcher positionality becomes particularly complex in navigating insider-outsider dynamics within highly structured institutional environments.

These challenges cannot be resolved through simple adaptation of civilian bioethics principles. Instead, military research ethics requires fundamental reconceptualisation that acknowledges structural constraints on autonomy while maintaining meaningful participant protections. This analysis argues for development of military-specific ethical frameworks emphasising cultural competence, trauma-informed approaches, and sustained reflexivity. Rather than relying on procedural compliance, ethical practice in military contexts demands contextual sensitivity, recognition of institutional power dynamics, and ongoing critical engagement with the contradictions inherent in researching populations trained to suppress vulnerability and prioritise collective aims over individual needs.

1. Introduction

The dominance of quantitative methods in psychological research has historically limited exploration of lived experience, particularly in military contexts where standardisation, measurement, and generalisability are often prioritised (Green and Thorogood, 2018; Williams et al., 2012; Moore et al., 2017; Gross, 2018). Qualitative research offers critical insights into how culture, identity, institutional power, and relational dynamics shape both wellbeing and research participation in military settings (e.g. Binks and Cambridge, 2018; Demers, 2011; Shue

et al., 2021). However, conducting such research with military populations presents distinctive ethical challenges that existing research ethics frameworks may inadequately address.

This analysis focuses primarily on voluntary service militaries in Western contexts. The ethical dynamics discussed may manifest differently in conscripted forces, non-Western military cultures, or in conflict versus peacetime settings. This article draws on the first author's doctoral research examining how civilians construct soldier identity within the Australian Defence Force. The study, situated within a broader exploration of military culture, and mental health, was

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informed by over a decade of clinical practice within military mental health services. The reflections and conceptual analyses presented here are grounded in reflexive analysis of fieldwork, ethical dilemmas encountered during the research process, and sustained engagement with military cultural dynamics. The first author brings a partial insider perspective that enables close observation of ethical tensions as they arise in practice (Greene, 2014; Berger, 2013). This reflexive account acknowledges that "what stories we are told, how they are relayed to us, and the narratives that we form and share with others are inevitably influenced by our position and experiences as a researcher in relation to our participants" (Greene, 2014, p. 1). In military research contexts, this positioning becomes particularly significant given the unique power structures, cultural norms, and ethical complexities that characterise military institutions, which function as total institutions that systematically strip away individuality through processes of instrumentalisation, discipline, and social control (MacLeish, 2015; Smith and True, 2014).

Military personnel, both serving and ex-serving, are increasingly recognised as a vulnerable population within research ethics frameworks (Townsend et al., 2023). This vulnerability stems not only from exposure to operational stressors but also from institutional hierarchies, codified obedience to authority, and structural pressures that can compromise voluntary participation (Gross, 2018; Hayes, 2006). Despite public narratives of strength and resilience, military culture fosters an ethos of conformity and loyalty that can obscure power differentials and inhibit dissent, even in contexts designed to prioritise participant autonomy (Latheef and Henschke, 2020; Nwobegahay et al., 2015).

The complexity of ethical considerations in military research is compounded by the heterogeneity of military populations. The term military personnel encompasses diverse individuals from enlisted recruits to senior officers, across varied operational and national contexts (Lane, 2019; Redmond et al., 2015). Conscription practices, voluntary service, deployments, and career stage all influence how individuals relate to institutional authority and navigate ethical decisions, including participation in research. Military identity interacts with sociocultural factors such as gender, ethnicity, and civilian-military transitions in ways that produce complex and sometimes conflicting value systems (Connor, 2010; Mehlman and Corley, 2014).

Military populations exist along a continuum with veterans and their families, many of whom continue to access institutional support through veterans' affairs systems. Ethical concerns extend beyond active-duty settings to encompass transitional care and long-term service-related health needs, often under conditions of institutional control and residual cultural influence (Williams et al., 2012).

2. Reflexive methodology

This article includes reflexive memos drawn from field notes and journal entries written during the conduct of the first author's doctoral research. Reflexive memos are a qualitative research tool used to document the researcher's ongoing critical reflection on their assumptions, reactions, and evolving understanding throughout the research process (Berger, 2013). They serve multiple purposes: making visible the researcher's positionality and how it shapes data collection and interpretation, documenting methodological decisions and ethical tensions as they arise in practice, and providing an audit trail of the researcher's analytical thinking (Birks et al., 2025). In this manuscript memos are included as analytic data points rather than illustrative anecdotes. They offer insight into the ethical tensions encountered in practice and are interpreted within the surrounding text to show how these experiences shaped the analysis. Their inclusion supports a reflexive, situated approach to ethical enquiry in military research.

3. Voluntary participation in military research contexts

Military research environments present unique ethical challenges

that fundamentally disrupt traditional bioethical frameworks grounded in individual autonomy (Beauchamp and Childress, 2019). Within military contexts, participation occurs within systems of rank, institutional authority and cultural norms that generate what Robinson (2007) describes as an autonomy paradox. Personnel are expected to exercise moral judgment in operational roles, yet their autonomy is structurally constrained by a duty to obey.

The distinction between volunteer and *voluntold* (a military colloquialism referring to ostensibly voluntary participation that is in fact compulsory) participation illustrates how consent can be compromised by implicit expectations. Personnel may be nominated by their chain of command for activities that are nominally voluntary but perceived as compulsory. Declining such invitations risks reputational damage or diminished career prospects (Braun et al., 2015; Latheef and Henschke, 2020). In practice, these dynamics foster conditions where participation is formally optional but socially coerced.

Military command structures regulate not only operational decisions, but also aspects of daily life, including healthcare access, medication, and treatment options (Atuel and Castro, 2018; Lane, 2019). In this context, autonomy is better understood as directed freedom within a system oriented towards collective goals (Cook and Syse, 2010). Military training mandates deindividuation and dissociation, conditioning personnel to forgo seeking information or questioning directives (Smith and True, 2014). Service members operate within a framework of constrained choice, where values such as duty, loyalty and obedience are prioritised over personal preference (Nwobegahay et al., 2015). Military culture normalises constrained autonomy through an ethos of duty, sacrifice, and obedience for the common good (Latheef and Henschke, 2020; Nwobegahay et al., 2015; Olsthoorn, 2010; Robinson, 2007).

3.1. Reflexive memo: observing voluntold dynamics

During my clinical practice, I regularly observed mental health first aid and suicide first aid training, supposedly voluntary activities, where members were nominated by Chain of Command. While this was not a research context, the voluntold dynamics I observed closely parallel the concerns raised in the literature about research recruitment. The invitation to participate carried implicit expectations that made genuine refusal practically impossible. Members understood that declining could impact perceptions of their commitment, teamwork, or suitability for future opportunities. The average soldier, whilst legally able to refuse, faces systemic pressures that make such refusal extremely difficult.

This memo illustrates how nominal voluntariness within military contexts often operates under a regime of institutional obligation. For participants, the decision to engage in research may carry similar implications to the voluntary training scenarios witnessed by the first author: the technical right to refuse remains intact yet is rendered inert by implicit social and organisational expectations. As a researcher, recognising these dynamics forced the first author to reassess assumptions about the adequacy of conventional consent processes. It raised the question of whether participation can ever be meaningfully voluntary when declining is socially penalised or professionally risky. This insight shaped how the first author approached consent in their own study, prompting strategies to decouple participation from command influence wherever possible.

These reflections affirm that the military context imposes a unique cultural logic on consent. What appears ethically sufficient under civilian frameworks may fail to account for the lived realities of those embedded in institutional hierarchies. This value system may foster participation in research that aligns with institutional goals but places individuals at risk. Where commanders prioritise unit welfare or operational efficiency, participation may be indirectly encouraged in ethically complex studies (Latheef and Henschke, 2020). Service members are legally obligated to obey lawful orders and may extend this sense of obligation to perceived expectations from superior officers, including

those conducting research (Latheef and Henschke, 2020; McManus et al., 2005).

These dynamics underpin recognition of military personnel as a vulnerable research population (Gordon, 2020; Townsend et al., 2023). Vulnerability arises not only from occupational risks but from structural features that compromise truly voluntary consent. Cultural norms around obedience, alongside formal hierarchies, shape participant behaviour in ways not adequately captured by conventional ethical guidelines.

Historically, military research has also suffered from ethical breaches that undermine trust. Some have argued that military service constitutes implicit consent to institutional demands, but this overlooks the complex socio-economic and cultural factors that shape enlistment and constrain autonomy (Latheef and Henschke, 2020). Legal doctrines such as the Feres doctrine (Feres v. United States, 1950) in the United States, which prevents U.S. service members from suing the military for research-related harm, further weaken participant protections (Mehlman and Corley, 2014).

Despite international advances in research ethics since Nuremberg, most protocols do not adequately address the coercive structures of military life (Nwobegahay et al., 2015; McManus et al., 2005). Military researchers are often under-prepared to separate participants from institutional authority during recruitment or consent processes (Williams et al., 2012). Without clear guidance, researchers face difficult tensions between upholding participant autonomy and fulfilling institutional expectations.

Although formal policy may prohibit commanders from directing subordinates to participate in research, implicit pressures persist, with service members potentially inferring that non-participation signals disloyalty or selfishness in environments where team cohesion and sacrifice are culturally paramount (Latheef and Henschke, 2020). These layered influences call for more context-sensitive ethical approaches that acknowledge the distinctive constraints on choice experienced by military participants and address them in both study design and consent procedures.

Beyond the structural pressures that compromise voluntary participation, the mechanics of written consent documentation introduce additional complications. Written consent is typically framed as protective, but in military settings it can create distinct vulnerabilities. A signed document becomes a durable link between an identifiable service member and the research, and personnel have well documented concerns about how records may circulate within systems designed to monitor fitness, security and performance (Department of Defense, 2023; Wong et al., 2025). Evidence suggests that confidentiality anxieties influence help seeking and disclosure because members fear repercussions for clearance status and career progression (Department of Defense, 2023; Wong et al., 2025). Ethnographers working in other sensitive institutional contexts have similarly observed that written consent can fail to protect participants, can obscure ethically questionable practices, and may be culturally inappropriate or risky in certain political or institutional environments (Wynn and Israel, 2018). Human research regulations permit waiver of documentation when the consent form would be the only record linking an individual to sensitive participation, when signing a form introduces more than minimal risk, when cultural norms favour verbal agreement, or when confidentiality is better protected without a written signature (Department of Health and Human Services, 2022; National Health and Medical Research Council [NHMRC], 2023). These regulatory provisions acknowledge that written consent can function as exposure rather than protection in certain contexts.

4. Military values and research participation

Military culture reshapes identity through an intensive socialisation process designed to align individual behaviour with institutional policies (Heward et al., 2024). Recruits are inculcated with values such as honour, integrity, commitment, loyalty, respect, and service before self, transforming personal identity into one centred around the collective good (Antonesei and Făsărea, 2023; Atuel and Castro, 2018). This process embeds a moral orientation that prizes self-sacrifice and discourages dissent.

The military uses both vertical and horizontal attachment structures to reinforce these values, fostering bonds with leaders and peers that are experienced as foundational to identity and belonging (Connor, 2010; Dabovich et al., 2019). This deliberately cultivated structure creates powerful psychological bonds that can "transcend all others, even the marriage and family bonds we forge in civilian life" (Demers, 2011, p. 141). These relational dynamics promote deeper alignment with institutional norms and create conditions where refusal to participate in research may be interpreted not as an individual choice but as a failure of loyalty or commitment (Huerne, 2023; Kolditz et al., 2003).

Latheef and Henschke (2020) note that military socialisation involves deliberate detachment from prior civilian worldviews and immersion into a new framework grounded in obedience and mission-first thinking. Branch, rank, and duty often become more central than traditional civilian markers such as race, ethnicity, or religion (Lane, 2019). This produces heightened military or veteran identity salience, where military values and experiences remain prominent in shaping self-concept and decisions long after discharge (Dolan et al., 2022; Heward et al., 2024). In this environment, decisions are filtered through collective values. Participation in research may be driven less by autonomous preference and more by belief in contribution to the greater good (Coll et al., 2011; Greene, 2014).

4.1. Reflexive memo: values as visual reminders

On my local Army base, the Australian Defence Force values of service, courage, respect, integrity, and excellence are visibly displayed on flags along the main thoroughfare, providing constant visual reinforcement of organisational expectations. This physical manifestation of values represents more than mere symbolism; it reflects the systematic embedding of value-based thinking into daily military life.

When service members volunteered for my research, their motivations were consistently articulated through these organisational values: "It's my duty to help advance our understanding," "I want to serve something bigger than myself," "This could help my mates." Initially, I interpreted this as evidence of genuine voluntary participation grounded in personal conviction. However, sustained observation revealed a more complex reality where distinguishing between authentic personal belief and organisational conditioning became nearly impossible.

This memo highlights how military values are not simply abstract ideals but are materially embedded in everyday experience. When participants articulated motivations for participation using the language of duty, service or collective benefit, the first author initially took these as indicators of autonomous, value-driven choice. However, on reflection, the first author came to see these responses as shaped by pervasive value system that privileges loyalty and collective obligation. This does not invalidate participants' sincerity, but it complicates the ethics of interpreting such motivations as purely internal. The memo surfaces a core tension between respect for participants' expressed reasons and critical awareness of how institutional conditioning may contour those reasons. This insight reinforces the need to interrogate the motivations participants express through a lens sensitive to cultural conditioning and institutional socialisation.

Military values can become internalised moral imperatives that exert strong influence over decision-making. Participation in research is often framed as a continuation of one's duty, especially among veterans who maintain a strong affiliation with military identity (Dabovich et al., 2019; Flynn et al., 2019). These values do not necessarily undermine participant welfare, but they raise questions about whether consent reflects a freely made choice or an extension of one's institutional role.

Traditional consent models assume that decisions are made on

individual cost-benefit analysis. In military contexts, however, consent may be offered in the context of collective benefit, duty, or moral obligation. When participation becomes an enactment of institutional values, ethical review processes must carefully assess whether these motivations reflect genuine voluntariness or institutional influence that blurs the line between choice and compulsion.

Understanding the depth of military socialisation is critical to ethical research design. Researchers must attend to how these values shape not only decisions to participate but also the nature of disclosures made during interviews. Loyalty, stoicism, and aversion to weakness can limit what participants are willing to share, particularly regarding distress or vulnerability. Ethical research design in this context requires not just protection from harm, but recognition of the institutional forces that shape what participants believe they are allowed to say.

5. Institutional control and oversight

Qualitative research with military populations is shaped by distinctive layers of institutional authority. Gaining access to current personnel often requires approval from senior leadership and multiple ethics committees, many of which are embedded with military departments. This process extends far beyond typical informed consent requirements creating procedural barriers that can delay or even preclude research supporting military and veteran health (Moore et al., 2017). Hierarchical and frequently changing command structures compound these challenges, requiring researchers to navigate shifting protocols and bureaucratic delays that can extend timelines by months or even years (Cook and Doorenbos, 2017; Meggs, 2009).

5.1. Reflexive memo: frustration at ethics timeframe

The bureaucratic maze of military research approval has been a source of immense frustration. What should have been a straightforward process became a nearly 24-month ordeal marked by administrative failures and shifting requirements. After submitting my proposal in May 2023, I encountered incorrect forms, lost documentation when email attachments were too large for their gateway (with no delivery failure notification), and months of silence from subject matter experts. When I finally received feedback in July 2024, oversight had transferred to a new team who introduced entirely new requirements for formal legal agreements between institutions involving both legal teams. Despite receiving ethics approval in November 2024, I still cannot recruit current serving members due to incomplete institutional agreements. The irony is stark: I can recruit ex-serving members who are now civilians, but not current personnel who remain under institutional control. This protracted timeline doesn't just delay research - it undermines the very populations we're trying to help by postponing access to findings that could improve military and veteran wellbeing.

The frustration reflected in this memo signalled more than administrative inconvenience. It revealed how standard ethics frameworks, designed for general populations, often fail to accommodate the logistical and relational constraints of research within the military. The requirement to finalise all study materials, such as interview guides before participant engagement clashed with the relational and iterative nature of qualitative work. It forced premature closure on elements that, in more flexible settings, could be co-developed with participants. This rigid sequencing risked alienating participants or missing emerging ethical concerns, and raised broader questions about how ethics committees understand the nature of qualitative inquiry in structured institutional settings. These personal experiences reflect wider patterns in military research ethics oversight, as documented in studies across the US, UK, and Australia.

The scale of this burden is substantial. Multisite health studies require a median of 286 days for approval per site (Green et al., 2006). Military settings often involve additional inter-agency coordination. One study was delayed over two years due to repeated DoD Institutional

Review Board (IRB) revisions, rendering time-sensitive research questions obsolete (Meggs, 2009).

This mission creep reflects increasing focus on administrative compliance rather than participant protection (Gunsalus et al., 2006). Military IRBs often require redundant documentation, multiple review levels, and edits unrelated to ethical concerns, such as typographical corrections or formatting issues (Williams et al., 2012). These inefficiencies strain researcher capacity and disrupt timelines, particularly when funding requirements do not align with prolonged approval processes (Moore et al., 2017).

Delays carry ethical consequences beyond inconvenience. Extended approval timelines can lead to turnover among research staff or render research questions obsolete (Williams et al., 2012). Moreover when funding and academic timelines do not align with military administration cycles, researchers may be forced to abandon or truncate projects before reaching meaningful conclusions.

Military ethics review boards (IRBs) introduce structural tensions which may be absent from civilian contexts. When embedded within military departments, conflicts of interest may arise where institutional risk management and reputational protection override participant welfare (Williams et al., 2012; Singh and Wassenaar, 2016). Researchers may be required to seek approval from both university and military ethics boards, each with separate requirements and timelines. In some cases, gatekeepers may restrict dissemination of findings or limit researcher access to participants, particularly when topics are perceived as sensitive or critical of institutional practices (Singh and Wassenaar, 2016).

5.2. Reflexive memo: concerns about participant selection

I am concerned that Defence may compile a curated list of individuals for me to interview rather than allowing open recruitment. This would fundamentally compromise the research by introducing selection bias that favours participants likely to present positive organisational perspectives, creating organisational propaganda rather than genuine research into military experience.

This memo reflects the first author's discomfort with the ways organisational approval processes could subtly shape who was available and willing to participate. The reliance on gatekeepers and the indirect pressure on certain types of personnel to engage may have introduced systematic exclusions. It was often those most aligned with military norms who volunteered, while more critical or vulnerable voices were filtered out, intentionally or not. This selective participation risked producing a skewed dataset and raised ethical concerns about whose experiences were being rendered visible. As a researcher, this challenged the first author to consider how inclusion and exclusion are not just methodological issues but also ethical ones. These concerns align with broader critiques of institutional gatekeeping and its potential to distort research integrity.

Efforts to streamline ethics review across institutions have been attempted in some jurisdictions, although their relevance to military research remains limited. In the United States, for example, the National Institutes of Health mandates the use of a single institutional review board (sIRB) of record for most NIH-funded, non-exempt multi-site studies (National Institutes of Health, 2016). In practice, the utility of the sIRB model is constrained by university-level policies limiting reliance agreements, uncertainty over its application to exempt or unfunded research, and persistent local control over institutional risk management (Silberman and Kahn, 2011; Green et al., 2023). Crucially, even where an sIRB is in place, research involving active US military personnel still requires separate review via the U.S. DoD Human Research Protection Office, underscoring that streamlining initiatives do not ordinarily extend to military populations (Department of Defense, 2023). Comparable governance patterns are evident in the United Kingdom, where civilian university ethics committees or NHS research ethics structures review general social research, while research involving serving military

personnel is subject to review by the (Ministry of Defence Research Ethics Committee). The Australian system differs in a significant way: research involving either serving or ex-serving ADF members, even those who are legally civilians, is subject to review by the Departments of Defence and Veterans' Affairs Human Research Ethics Committee (DDVAHREC) (DDVAHREC, 2024). This population-based requirement imposes an additional ethics governance layer that does not align with civilian research review and exemplifies how military-related oversight can create structural barriers to social research. These patterns underscore the need for reforms that go beyond procedural streamlining to address the distinctive structural barriers imposed by military institutional oversight. Without such changes, ethics governance itself risks becoming a barrier to research intended to support military and veteran wellbeing.

6. Recruitment and cultural access in military contexts

Recruiting military personnel into qualitative research presents distinct ethical and logistical barriers not encountered in civilian contexts. Operational unpredictability, cultural stigma, and mistrust toward civilian researchers constrain both access and disclosure.

Unpredictable operational demands often interrupt participation. Military life includes sudden deployments, unanticipated training exercises, and frequent relocations, which can interrupt data collection or render participants unreachable (Braun et al., 2015). Participants who consent to an interview may be deployed within days. A systematic review of clinical trials found that studies targeting military populations frequently failed to meet enrolment targets, often resulting in early termination due to such disruptions (Cook and Doorenbos, 2017). Researchers must build flexibility into study protocols: offering secure phone or video interviews, negotiating permissions to contact participants at future postings, and scheduling interviews during periods of relative stability.

Stigma also affects participation. Topics such as mental health, substance use, and moral injury, are heavily stigmatised in military environments, as they conflict with military ideals of strength and self-reliance. Disclosures may contravene subcultural expectations for wellness and psychological resilience, and participants may fear ostracism, punitive action or career repercussions (Lincoln et al., 2016; Surmiak, 2020). Institutional narratives often translate moral and social struggles into individual psychological problems whilst failing to acknowledge the contradictory meanings of violence that military service entails (Molendijk et al., 2016). A pervasive informal but powerful code of silence discourages vulnerability, extending beyond operational security to private emotional life (Lincoln et al., 2016). Combined with the history of unethical research involving military personnel, these dynamics contribute to mistrust. Veterans report that the military has a poor reputation for protecting research participants, leading to scepticism about research motives (Flynn et al., 2019).

These barriers are further compounded by participants' exposure to trauma, loss, and morally injurious experiences. Even studies not explicitly focused on trauma may elicit narratives involving death, injury, guilt, or shame (Isobel, 2021; Li et al., 2025). Moral injury, defined as the psychological distress resulting from violations of personal ethics (Litz et al., 2009), is particularly difficult to discuss within military culture. Repeated questioning may cause emotional harm, and participants may struggle to disclose such experiences even when willing (Schuman et al., 2021).

A trauma-informed research approach is essential. This includes preparing researchers to recognise distress, pacing interviews sensitively, allowing participants to skip questions or withdraw, and providing counselling resources from the outset (Isobel, 2021). Clear protocols must also be in place for managing risk disclosures. If a participant expresses suicidal ideation, intent to harm others, or reports serious criminal conduct, researchers may be obligated to break confidentiality (Williamson et al., 2021). These limitations should be made

clear during the consent process, and researchers should have well-defined protocols in place to handle such situations.

Serving members face unique constraints around disclosure. Mandatory reporting requirements may oblige researchers to notify military contacts, who may then inform the chain of command. This can result in broader organisational awareness of sensitive disclosures, with implications for participants' careers, relationships, and security clearance. Confidentiality protections for serving members are markedly weaker than for civilian participants. Furthermore, current serving members cannot receive financial compensation for research participation as they are considered on duty 24/7, 365 days of the year, with the organisation effectively paying them for their time (Braun et al., 2015). This institutional logic reinforces the total institution character of military service while potentially influencing what participants feel comfortable disclosing when their employment relationship with the researcher's institutional partner remains ongoing. These complex disclosure dynamics raise important questions about the ethical boundaries of confidentiality and the extent to which researchers can truly protect participants' privacy in institutional settings.

6.1. Reflexive memo: dual obligations and privacy breaches in military research

As a clinical psychologist conducting research with current serving members, I face an ethical tension between my clinical training and institutional research requirements. In clinical practice, if a participant disclosed suicidal ideation, I am permitted under my code of ethics to breach the Privacy Act 1988 only to those absolutely necessary to support the person - typically emergency services or mental health crisis teams. The breach is targeted, clinical, and focused on immediate safety.

However, as a researcher within the military context, I am required to notify my Defence research contact about any serious risk disclosures, who may then inform the chain of command. This person is not a health professional, and the disclosure extends well beyond what would be absolutely necessary for clinical safety. The participant's private mental health crisis becomes organisational knowledge, potentially affecting their career, security clearance, or unit relationships.

This creates an ethical dilemma that extends beyond my dual role. Non-health researchers conducting military studies may be even less prepared to handle risk disclosures appropriately yet face the same institutional reporting requirements. The military's need to know about risk to personnel is understandable, but it fundamentally alters the research relationship. Participants cannot receive the same privacy protections they would expect in civilian research or clinical settings. I must wonder: does this additional privacy breach actually enhance safety, or does it simply reflect institutional surveillance? And might knowing this requirement deter participants from disclosing mental health struggles they desperately need support for?

This dilemma reveals how institutional risk protocols can undermine the ethical agreement between the researcher and participant. Unlike clinical contexts, where disclosures trigger minimal, safety-focussed responses, military reporting requirements involve organisational actors who may lack mental health training and operate within a framework of command accountability. This alters the research relationship, transforming researchers into potential informants and participants into subjects of institutional interest. Such dynamics compromise psychological safety and may discourage full disclosure, particularly around stigmatised topics like suicidality. Researchers, especially those without clinical backgrounds, require training and clear protocols that balance institutional safety mandates with ethical commitments to participant welfare, confidentiality, and dignity. These concerns are not hypothetical. They reflect real structural conditions that shape what participants are willing to disclose and how researchers must navigate institutional demands without compromising ethical standards.

Participants may also inadvertently disclose classified or operational sensitive information. Civilian researchers may lack the established

protocols and legal protections that govern confidentiality in clinical settings, particularly when participants' disclosures relate to ongoing missions or sensitive military capabilities. Researchers with clinical training may face ethical tensions between professional obligations and institutional expectations.

Researchers must negotiate explicit agreements with military institutions regarding when and how confidentiality may be breached. Still, even with transparent consent procedures, participants may be reluctant to engage with research they perceive as morally complex or personally exposing.

Recruitment materials should avoid stigma and emphasise confidentiality. Language that minimises perceived risk, such as describing a combat trauma, study as stress and coping in service members, may improve engagement. Ethical research in military settings requires constant calibration of benefit, harm, and institutional influence.

7. Researcher positionality: navigating insider-outsider dynamics

In qualitative research, the researcher is not a neutral observer but an active agent in meaning-making. This is particularly significant in military research, where identity, power and institutional culture shape both participant experience and researcher interpretation. Reflexivity, ongoing critical reflection on one's own position, biases, and impact, is therefore an ethical imperative (Berger, 2013).

Researcher positionality is often conceptualised along an insider-outsider continuum rather than a binary (Dwyer and Buckle, 2009). Berger (2013) identifies three configurations: *insiders*, who share relevant identity or experiences with participants; *outsiders*, who do not; and *becomers*, who shift position over time through prolonged engagement. Each configuration relative to the military community being studied offers ethical and methodological benefits and risks.

Insider researchers, such as veterans or currently serving personnel, may be granted immediate legitimacy and access. Shared language, norms and experience can facilitate trust and elicit culturally grounded disclosures (Bashir, 2023). However, insiders must remain aware of potential unexamined assumptions, role confusion, or over-identification with participants (Finnegan, 2014). They must navigate their own biases and maintain professionalism to prevent conflicts of interest that could undermine research integrity. Systematic reflexivity, such as writing memos about emotional reactions or unexpected assumptions, can help researchers navigate these tensions (Berger, 2013).

Outsider researchers, often civilian academics, may lack cultural fluency and may face initial suspicion or distance (Huerne, 2023). Many researchers enter military settings without adequate preparation for the cultural, relational, and ethical complexities involved. This gap can lead to well-intentioned but ethically problematic decisions, such as applying standard consent procedures without adapting them for rank hierarchies or inadvertently reinforcing stigma through the language used (Schuman et al., 2021). Outsiders may be perceived as neutral or even naive, which can facilitate candid conversation, provided the researcher demonstrates genuine cultural competence and respect (Redmond et al., 2015; Huerne, 2023). Researchers must navigate continuous renegotiations of access, as formal agreements do not guarantee sustained cooperation and security requirements often conflict with academic transparency (Sjøgren et al., 2024). Yet even well-meaning civilian researchers may underestimate the depth of cultural divergence, as the following experience illustrates.

7.1. Reflexive memo: the civilian-military understanding gap

A senior academic colleague's response to my concerns about constrained consent - "no one is holding a gun to their head" - crystallised how civilian frameworks fundamentally misunderstand military institutional control. This response revealed three problematic assumptions:

that military service is analogous to civilian employment, that legal rights to refuse equal practical ability to refuse, and that external coercion is the primary threat to autonomy.

Military life is not analogous to civilian employment, it involves legal obligations, institutional socialisation, and career dependencies that significantly constrain individual choice. Even well-meaning civilians, including those with military family members, may underestimate these pressures. This conversation reinforced how easily civilian ethical frameworks can be misapplied to military populations, leading to research designs that fail to protect autonomy or acknowledge institutional vulnerability.

This moment underscored how civilian assumptions about voluntariness can obscure the ethical complexities of military participation. The colleague's framing ignored the deeply embedded structures of obligation that characterise military life. In research terms, such misapprehensions risk shaping designs, consent processes, or ethics approvals in ways that inadvertently fail to protect participants. Researchers without deep familiarity with military culture may assume that procedural consent implies meaningful choice, missing the ways in which organisational socialisation, perceived loyalty, and implicit pressure shape participation. This highlights the necessity of cultural competence not only for researchers, but for ethics committees, collaborators, and reviewers involved in military research.

A third positionality, the becomer, emerges when researchers develop deeper ties to the community over time. Through sustained engagement, researchers may become culturally embedded, altering how participants relate to them and how consent, confidentiality, and interpretation must be managed. This shift can blur ethical boundaries, requiring researchers to revisit processes and remain alert to evolving dynamics (Berger, 2013).

The imperative for cultural competence extends beyond clinical practice to research contexts. Recent evaluations of military cultural competency training reveal six core domains essential for effective engagement with military populations: understanding military language and terminology, recognising rank structures and hierarchical relationships, appreciating collectivistic values that prioritise unit cohesion over individual autonomy, acknowledging how military identity intersects with other aspects of social identity, navigating unique ethical considerations within military institutional contexts, and developing culturally appropriate rapport-building strategies (Collins et al., 2024; Isserman and Martin, 2022).

For military researchers, these competencies translate into methodological considerations that extend far beyond familiarity with acronyms or rank structures. Cultural competence requires understanding how military socialisation shapes disclosure patterns, how hierarchical relationships influence consent processes, and how institutional values affect what participants perceive as acceptable topics for discussion (Redmond et al., 2015; Lincoln et al., 2016). Without this foundational knowledge, researchers risk misinterpreting participant responses, inadvertently reinforcing harmful stereotypes, or failing to recognise when institutional pressures are constraining genuine voluntary participation (Lincoln et al., 2016). Over time, the first author's sustained engagement with military culture positioned them in a becomer role, complicating the ethics of interpretation and representation.

7.2. Reflexive memo: cultural legitimacy

One participant in my study noted that after hearing me speak on a podcast about Defence culture, he felt confident I "got it" and "had this." He described feeling seen and safe because of my demonstrated understanding. Another colleague, herself ex-military, commented that my decade of clinical work within Defence had given me the same level of cultural fluency as someone with formal service. These moments affirmed that sustained cultural engagement can build legitimacy in ways not limited to service history. But with that trust comes responsibility, participants presumed I would accurately and respectfully

represent their experiences. This perceived competence becomes an ethical obligation in itself.

These exchanges illuminate the dual role of cultural fluency in military research: it facilitates access and rapport but also brings heightened responsibility. The perception that the researcher understands creates a trust dynamic in which participants may feel confident sharing sensitive or high-stakes narratives. However, this trust also imposes an ethical burden. Cultural legitimacy, once conferred, must be honoured through rigorous, respectful representation that neither sensationalises nor sanitises participants accounts. This extends beyond accurate transcription or analysis to include decisions about interpretation, publication, and audience. In this sense, the researcher's cultural competence becomes a form of ethical accountability that shapes the entire research arc. This obligation becomes even more complex when researchers operate within institutional affiliations that may influence their perceived independence.

Additional tensions can arise when researchers are embedded in military contexts or funded by military agencies. Military-affiliated researchers may encounter competing obligations between professional research ethics and military norms or institutional expectations (Lundberg et al., 2017). These tensions can manifest in subtle ways, for example a uniformed researcher might feel pressure to prioritise chain-of-command loyalty over participant confidentiality, whilst civilian researchers working under military contracts may hesitate to publish findings perceived as damaging to funding institutions. These dual obligations mirror longstanding concerns in military health about institutional duty and professional ethics (Beardmore et al., 2024).

Reflexivity is not a theoretical exercise but an ongoing practical commitment. Researchers must maintain a sustained awareness of how their background, assumptions, and institutional affiliations and evolving relationships influence the research process. This includes making dual-role tensions explicit in ethics applications, clarifying the limits of confidentiality, and adjusting consent processes in light of changing rapport. In military settings where norms of obedience and hierarchy dominate, fostering genuine voluntary participation requires deliberate effort to create space for agency, reflection, and refusal (Berger, 2013).

8. Rethinking ethics in military research: beyond civilian assumptions

Military research ethics cannot be meaningfully guided by frameworks developed for autonomous civilian participants. Civilian bioethics, with is emphasis on individual autonomy, informed consent, and harm minimisation, rests on assumptions that often do not hold in military contexts. These principles, while foundational in many domains, encounter structural limitations in a setting where institutional loyalty, hierarchical obedience and group cohesion are core to professional identity (Atuel and Castro, 2018; Braun et al., 2015).

Mehlman and Corley's (2014) effort to adapt bioethics in military settings by proposing proportionality, paternalism, and fairness is frequently cited as a way forward. However when viewed through the lens of lived military dynamics, their framework offers only partial utility. Proportionality appears to offer a rational calculus, but in practice may justify exposure to greater risk if research is seen to advance mission objectives. Paternalism assumes that commanders can protect subordinates' welfare, yet this presumes both medical competence and ethical primacy in settings where operational success typically takes precedence. Fairness, though well-intentioned, assumes an ability to equitably distribute research burdens in systems where gatekeeping and cultural conformity routinely silence dissenting perspectives (Williams et al., 2012; Singh and Wassenaar, 2016).

The deeper issue is not that these principles are irrelevant, but that they presume a level of voluntariness and protection that military culture systematically undermines. When consent is obtained through institutional channels, often with supervisors present or implicated, the act of agreeing can become indistinguishable from an order. Even efforts to distance recruitment from chain of command may falter when military identity is experienced as one's most salient social identity, rendering deferral to authority automatic and often unexamined (McManus et al., 2005; Braun et al., 2015).

While direct examples of institutional tension cannot be elaborated in detail here due to the risks of identifiability, the ethical terrain of conducting civilian-led research with military personnel is marked by layered gatekeeping, divergent assumptions about mental health, and variable understandings of research independence. Navigating this terrain requires researchers to constantly balance openness to feedback with vigilance against institutional shaping. At times, feedback framed as ethical input may carry implicit expectations about the orientation, framing, or utility of the research. These dynamics illustrate how ethical review processes are rarely neutral in highly structured environments such as the military.

Moreover, existing frameworks offer limited guidance on how to respond to the long-term, diffuse risks posed by qualitative research with military populations. These may include emotional and psychological impacts on participants and the implications of disclosures that affect not only individuals but their families and communities. As Huerne (2023) has argued, such risks can persist long after research participation has ended and may be difficult to predict or mitigate in advance.

Efforts to develop military-specific ethical frameworks must therefore do more than repackage civilian norms. They must grapple directly with the institutional contradictions of military life, the ways in which service demands both protection and exposure, cohesion and conformity, silence and disclosure. Ethical practice in this context cannot be reduced to procedural compliance or abstract principles. It requires situated judgment, cultural competence, and ongoing critical reflexivity.

This means asking: who is empowered to speak within military research? Whose voices are absent, and why? How do institutional pressures shape the design, recruitment, and interpretation of research? And what responsibilities do researchers carry when working with populations trained to suppress vulnerability and prioritise collective aims over individual needs?

What is needed is not a new checklist of principles, but an ethic of contextual engagement. This involves embedding cultural consultation into research design, anticipating ethical dilemmas that may not fit conventional categories, and remaining attuned to power asymmetries that can persist even when formal protocols are followed. It also requires ethics committees and research institutions to abandon assumptions of universality and instead build review processes that account for the complex, often contradictory, lived experience of military service.

However even these contextual and reflexive approaches cannot fully resolve a deeper structural challenge. Military institutions exist fundamentally to apply organised violence in service of state interests and operate through hierarchical systems that extract compliance and discipline personnel (MacLeish, 2015). Research conducted within or about such institutions must grapple with an uncomfortable reality: participants deserve ethical treatment as individuals, yet they are embedded in structures whose core purposes create conditions that civilian bioethics frameworks struggle to address (Beauchamp and Childress, 2019; Mehlman and Corley, 2014; Latheef and Henschke, 2020).

This creates an ethical tension that our proposed framework acknowledges but cannot eliminate. Treating individual military personnel ethically does not resolve the broader question of whether research conducted within military institutions may inadvertently legitimise or support those institutions' functions and practices. Researchers must maintain critical reflexivity about their positionality relative to military power and remain alert to how their work may be instrumentalised, regardless of their intentions or the protections afforded to individual participants. Military institutions create a fundamental predicament where they both expose personnel to violence and provide their subsequent care and livelihood (MacLeish, 2015). This

predicament is managed by normalising violence as part of the job through institutional selection and training processes, with the expectation that psychologically 'normal' personnel should manage this exposure (Molendijk et al., 2016), generating contradictions that procedural ethics frameworks cannot resolve.

The principles proposed here attempt to navigate this tension by foregrounding structural constraints on autonomy whilst maintaining meaningful protections for participants as individuals. We do not claim to resolve the contradiction between individual ethics and institutional violence. Rather, we argue that ethical practice in military contexts requires explicit acknowledgment of this contradiction and sustained critical engagement with how research relationships are shaped by institutional purposes that extend far beyond the immediate researcher-participant dyad. This distinction between procedural ethics and ethics in practice (Guillemin and Gillam, 2004) becomes particularly salient in military contexts, where ethically important moments arise that cannot be anticipated or addressed through protocols alone.

What is needed is not simply adaptation of civilian principles, but reconceputalisation of the foundational concepts themselves. Rather than Beauchamp and Childress' (2019) traditional four principles, military research ethics requires a framework that acknowledges the structural realities of institutional life whilst maintaining meaningful protections for participants.

Situated Agency Must replace the individualistic notion of autonomy. This principle acknowledges that miliary personnel operate within systems of constrained choice, where decisions are filtered through institutional values, hierarchical obligations, and collective commitments. Situated agency recognises that meaningful choice can exist within structural limitations, but requires researchers to actively create space for reflection, dissent, and withdrawal that is genuinely separate from institutional expectations.

Collective Benefit Assessment expands beyond individual beneficence to explicitly weight how research impacts not only participants but their units, families, and the broader military community. This principle requires researchers to consider whether studies that benefit military institutions might inadvertently harm individual participants, or whether individual-focussed interventions might undermine unit cohesion. Such assessment demands transparent discussion of competing interests rather than assumptions about alignment.

Institutional Harm Prevention extends non-maleficence beyond immediate physical or psychological harm to encompass the career, social, and reputational risks that participation may entail within military contexts. This includes protecting participants from command scrutiny, peer ostracism, and long-term professional consequences that may emerge months or years after participation. Researchers must anticipate how institutional knowledge of participation could affect security clearances, promotions, or unit relationships.

Representational Equity replaces distributive justice with a focus on ensuring that research captures diverse military experiences rather than privileging the voices of those most aligned with institutional norms. This principle requires active effort to include critical perspectives, junior personnel, and those who might otherwise be filtered out through gatekeeping processes. It demands recognition that institutional selection bias can systematically exclude the most vulnerable voices.

These principles translate into concrete procedural reforms that go beyond conventional consent processes. **Staged consent** allows participants to agree initially to recruitment contact, then separately to participation, with mandatory waiting periods between each stage. This creates multiple opportunities for reflection and withdrawal whilst reducing the immediate pressure of face-to-face recruitment. **Third-party recruitment** through independent organisations or anonymous referral systems can help decouple participation from chain-of-command awareness, though complete separation may be impossible in practice.

Cultural competency requirements for both researchers and ethics review boards should include training in military hierarchies, institutional socialisation processes, and the specific vulnerabilities that arise within structured environments. This extends beyond familiarity with terminology to understanding how military culture shapes disclosure patterns, consent processes, and participant motivations in ways that civilian frameworks fail to anticipate.

Cooling-off periods of at least 48–72 h between initial contact and formal consent allow participants to consider involvement without immediate social pressure. During this period, participants should have access to independent information about their rights, the limits of confidentiality, and the absence of any obligation to participate. Such periods also allow researchers to separate recruitment from immediate institutional contexts that might constrain genuine choice.

Written consent documentation requires particular attention in military contexts. Researchers should consider whether waiver of written consent documentation is appropriate under human research regulations when the primary risk to participants is the existence of a signed record. When written consent is retained, researchers must ensure participants understand precisely how consent documentation will be stored, who may access it, and under what circumstances it might be disclosed to military authorities.

Modifying consent language or documentation procedures alone cannot resolve these underlying risks. More protective approaches rely on consent as an ongoing relational process, involving repeated clarification of autonomy, transparent discussion of confidentiality limits, and deliberate researcher practices that support trust rather than relying on documentation as the primary ethical safeguard.

These procedural changes cannot eliminate the structural tensions inherent in military research, but they can create conditions more conducive to voluntary participation whilst acknowledging the institutional realities that shape military life. Future work might productively draw on literature from other institutional settings where autonomy is constrained, such as prisons, immigration detention, or aged care, to consider how ethics can function under structural limitations. Cross-field insights could inform more nuanced, grounded approaches to military research ethics.

9. Training and preparation for military research

The ethical complexities outlined in this paper make clear that researchers conducting military research must be equipped with specialised training. Traditional human research ethics education is insufficient in setting where cultural norms, institutional hierarchies, and participant vulnerabilities diverge sharply from civilian contexts (Schuman et al., 2021). Training should emphasise the four principles of military research ethics: situated agency, collective benefit assessment, institutional harm prevention, and representational equity, rather than simply adapting civilian bioethics concepts to military contexts. Researchers unfamiliar with military systems may struggle to anticipate how chain of command, legal obligations, and organisational culture shape participants' capacity to give truly informed and voluntary consent.

Effective training should go beyond procedural ethics. It must integrate cultural competence, familiarity with military structures, and trauma-informed research practice. Researchers need to understand the implicit codes and communications styles that characterise military environments, as well as the historical legacy of unethical research that continues to shape institutional mistrust. This is not an academic formality but a necessary stance when navigating unequal power dynamics and working within systems where deference and control are institutionalised.

10. Implications for practice and policy

The theoretical framework and procedural reforms outlined above require institutional commitment to implementation. For military organisations, this means creating policies that explicitly separate research

participation from command influence, training commanders on the limits of their roles in recruitment and establishing independent pathways for participant concerns.

Institutional review boards must also evolve. Boards reviewing military research need expertise in military systems or access to advisors with this knowledge. Generic procedures fail to address how military hierarchies distort voluntariness or how stigma surrounding mental health, combat trauma, and moral injury affect disclosure. Review bodies should require researchers to articulate how they will protect participants from both anticipated and latent harm, social, career and psychological.

For military organisations, a commitment to ethical research means creating structures that enable, rather than constrain, voluntary participation. Commanders must be briefed on the implications of research involvement and clearly prohibited from pressuring subordinates to participate. Military policies should affirm the importance of research for operational readiness and member welfare while safeguarding the rights of those invited to contribute.

Bridging the civil-military gap requires effort and respect. To bridge this gap, researchers should invest time in cultural competence development. Simple gestures like learning basic military protocols, correctly using titles and ranks, and dressing appropriately demonstrate respect for military culture and signal care and legitimacy. Methodologically, researchers must consider military routines and constraints. Scheduling interviews around duty hours, training schedules, or mealtimes shows respect for participants' primary responsibilities. Some researchers establish interview spaces at base recreation centres or unit briefings where soldiers naturally gather, making participation more convenient and less disruptive to military duties. Trauma-informed training and interview protocols are essential, along with crisis response plans and clearly articulated duty-of-care boundaries. Research teams should maintain reflexive journals and support mechanisms to protect both participant and researcher wellbeing.

Together, these considerations suggest a need for research designs that decouple participation from institutional authority, integrate military-informed trauma protocols, and articulate researcher reflexivity throughout the process. Research in military contexts demands an approach that is not only ethically sound but culturally attuned, procedurally transparent, and continually responsive to power and vulnerability in practice.

11. Future directions and research needs

While this framework addresses key gaps in military research ethics, several questions remain unresolved. Cross-cultural validation is needed to determine how these principles apply across different military systems, particularly conscripted forces and non-Western military cultures. Empirical evaluation of the proposed procedural reforms of staged consent, third-party recruitment, and cooling-off periods could establish their effectiveness in practice. Finally, these approaches may have broader applicability to research in other total institutions such as prisons, residential care facilities, or religious communities, suggesting opportunities for comparative ethical analysis.

12. Conclusion

Ethical qualitative research with military populations requires more than the application of standard research protocols. It demands close engagement with the institutional, cultural and relational dynamics that shape military life. Hierarchical command structures, collectivist values, and a legacy of research-related mistrust all create conditions in which ethical risks are intensified and often difficult to predict.

This paper has outlined several key domains of ethical complexity: the distortion of voluntariness within chain-of-command structures, institutional gatekeeping that may prioritise organisational interests over participant welfare, the potential harms associated with trauma-

focussed research, and the shifting nature of researcher positionality in constrained environments. These challenges do not make military research unethical by default. Rather, they signal the need for context-specific approaches grounded in cultural competence, trauma-informed practice, and sustained reflexivity.

Researchers must be prepared to adapt their methods to the realities of military life, rethinking consent processes, anticipating the impact of cultural norms on disclosure, and embedding support mechanisms into study design. Ethical safeguards cannot solely rely on procedural compliance. They must be actively maintained through ongoing critical reflection and transparent engagement with participants and institutions alike.

Institutional review boards and ethics committees also have a role to play in closing the civil-military gap in ethical understanding. Developing military-literate ethics review processes, incorporating veteran voices, and drawing lessons from other constrained institutional settings can help build more robust protections.

Future work should attend to the lived experiences of service members as research participants, generate empirical evidence on what constitutes ethical practice in military contexts, and evaluate training and preparation for researchers new to the field. Longitudinal studies exploring the after-effects of participation in sensitive research could help refine safeguards and inform future ethical frameworks.

The principles of situated agency, collective benefit assessment, institutional harm prevention, and representational equity, combined with procedural reforms in consent and recruitment, offer actionable alternatives to civilian bioethics frameworks. These approaches acknowledge structural constraints on military autonomy whilst maintaining meaningful participant protections. While they cannot eliminate the inherent tensions of researching within hierarchical institutions, they provide concrete guidance for navigating these tensions responsibly. Ultimately, conducting research within military populations remains a form of professional trust that demands not only procedural compliance but sustained commitment to participant dignity, cultural competence, and recognition that ethical practice in constrained environments requires ongoing critical reflection rather than formulaic adherence to civilian norms.

CRediT authorship contribution statement

Carolyn Heward: Writing – review & editing, Writing – original draft, Methodology, Investigation, Conceptualization. **Wendy Wen Li:** Writing – review & editing, Supervision, Conceptualization.

Declaration of competing interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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Data availability

No data was used for the research described in the article.

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