

Lecture 1: Introduction

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Aims of the class

- Give you an idea of qualitative methods as they are used in the social sciences
 - main processes or phases
 - an idea of
 - when to use them
 - their role in business studies
 - their specific features in business studies
 - if not an ability to use them, a cognitive model for getting deeper into literature

Structure of these lectures

- The class proceeds in four parts with distinct identities
 - Introduction:
 - basics, some philosophy, research process, etc.
 - Producing observations:
 - the basics of data gathering
 - Obs! only the most important methods!

- Methodology/"inference":
 - analytic induction and its alternatives; reliability/validity, generalization
- Misc.
 - Ethics and confidentiality, writing qualitative research

Situating Qualitative Methods

- Historically...
 - A good deal of scientific knowledge in business studies was based on qualitative methods until "logical positivism" became popular in the 1960s
 - Qual methods have become an accepted part of business studies again since the 1980s

- Qualitative methods
 - have come back to (business) economics since the 1980s after the dominance of abstract empiricism (C. Wright Mills)

- Why?
 - we are more international: cultures matter
 - we are more educated: try army-style management today... and you lose your workforce
 - organizational forms are richer than in the 1950s
 - consumers are increasingly more sophisticated
 - so is gov't regulation
 - (you can continue this list)

- In response, new techniques of organizing, marketing etc. are needed
- To understand economy, organizations, we need research methods that respect specificity rather than assume unity in human action (including economic action)
- Qualitative methods are one response to these changes

- Qualitative methods
 - open up many new areas for research
 - enrich quantitative research, prepare but also deepen it, help to criticize it and its assumptions
 - qualitative knowledge contributes to research anyway: it is good to know its procedures
- keep in mind: it is a very radical idea to say that only measurable things are real

Introduction

What “qualitative methods” mean?

- The difficulty in defining the concept
 - Demurrer: it is a practice, a skill; how to produce an abstraction from something that exists in action?

- But some common features exist:
 - studying individual cases/instances
 - from “emic” point of view, not using researchers’ categories
 - inductive rather than deductive process
 - preference for naturally occurring data

Benefits of Being Qualitative

- The type of interest
 - lies in adding understanding of specificity, rather than producing general information
 - topic:
 - if you study the paper industry in Finland, you have three main players, and that's it. Can you be quantitative?
 - Ecological effects: if you study Stora-Enso's unions, they are not independent units, but belong to the same “population”

- Qualitative research often prepares quantitative research...
- ...but may as well be needed to learn about anomalies in statistical studies
- keep in mind that the aim of research is to add knowledge: good research typically does that regardless of methods!

On “philosophy”

- Starting point: differences between explanatory approach and interpretive tradition
- Keep in mind that
 - philosophy of science is not empirical: it is talk about research, not an accurate description
 - the following is a gross abstraction (Easterby-Smith et al., p. 30)

	Positivism	Interpretive tradition
Researcher	Is independent from the object	is a part of the unit being studied
Human interests (politics, economic)	As a rule ought not matter, are assumed not to matter	An inevitable part of any research
Explanations	Demonstrate causal relations between variables	Add understanding about the object
Progress in science	Through hypothesis, demonstration and counterdemonstration	Rich, carefully explicated data makes a set of “precedents” (as in common law)

	Positivism	Interpretive tradition
Concepts	Are “operationalized” to be measurable	Articulate the “subjects” understandings; are based on lay notions
Unit of analysis	Homogenous, typically small units	The unit can be “holistic,” difficult to define. What is “management” anyway?
Generalization	Statistically	Theoretically
Sampling	Requires a large sample that is selected stochastically	Small sample selected on purpose to maximize information

- Note
 - there are many strands in both traditions
 - still, take the table as a useful
 - diagnostic in analyzing presuppositions in your adopted scientific position
 - reminder that mixing odd elements usually leads to contradictions -- and bad grades

Qualitative Research Process

- Early phases
 - initially the researcher just has a common interest
 - defining research problem: typically wider than in quantitative research, but not too much
 - *working with lay concepts!!!*

- Searching for theory the next step
 - reading, thinking, selecting perspective from the library: tying work into scientific traditions and debates
 - lay knowledge transforms into researchable problems and questions

Note on “theory”

- Theories in the social sciences are not true or false, just better or worse
 - it is useful to distinguish unquestioned “perspective” from “hypotheses” that articulate competing theoretical perspectives
 - much like in economics: you don’t question the notion of rationality, but can question individual theories
 - don’t question everything -- or you end up giving up research

- “Producing Observations”
 - systematic data gathering begins
 - initially cautiously, data still feeds imagination
 - it is good to *forget theory* at this stage
 - hypothesis emerge gradually, and are organized even more gradually
 - also, new questions emerge in field work

- Later in field work...
 - you start to test these hypotheses consciously
 - a good deal of qualitative research in fact consists of hypothesis testing, *but this takes place late in the research process*
 - it is crucial to give data a chance to shape one’s thinking, *not just* to confirm or refute one’s theoretical explanations (=hypothesis)

- Writing
 - early phases may be easier in qualitative than quantitative research but...
 - qualitative research takes typically more time to write down

Two observations

- “Research design” in qualitative research is simpler than in experimental work
 - typical selection variables:
 - time frame, comparative cases, methods (possibly several methods)

- Practical aims add complexity
 - action research, benchmarking, organization development, constructive research

“Reactivity”: A Useful Concept

- Reactivity = the researcher’s effects on people, organization studied
 - in business studies, “the Hawthorne effect”
 - in the natural sciences, “contamination”
 - “Donald Roy’s fiasco”; Peter Kong-Ming New’s and Maurice Leznoff’s stories

- things that add reactivity
 - situational: organization politics, quarrels, antagonistic worker-management relations
 - sensitive research questions: politics, unfair business practices, sexuality ...
 - researcher’s activities: ought to be transparent for people studied

- Managing reactivity
 - cautiousness in early phases of research
 - common sense test
 - planning communication about research

Planning Qualitative Research

- When planning qualitative research
 - ...you should think about everything I talk about in this class
 - after selecting a topic, the rest is just thinking and planning: this class gives tools for that

- Writing winning proposals...
 - follow normal practice in research planning: stress on problem, contribution (&literature), methods (data gathering, inference), schedule, budget, ethics, etc.

- however, pay particular attention to explaining
 - qualitative method and its benefits, if it is uncommon to future reviewers
 - explain how you aim to generate hypothesis, not test existing theory
- if there is one principle, it is: explain in more detail everything that is uncommon in your research community

- Practical tips:
 - Reserve lots of time for writing
 - *Make* research plan into a tool: write and rewrite it, discuss it, go to conferences to get different viewpoints -- that is ultimately the only way to learn that you have written!

questions?

Sources

General

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