

Revisiting Qualitative Case Research in IB: The Power of Context

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My inspiration...

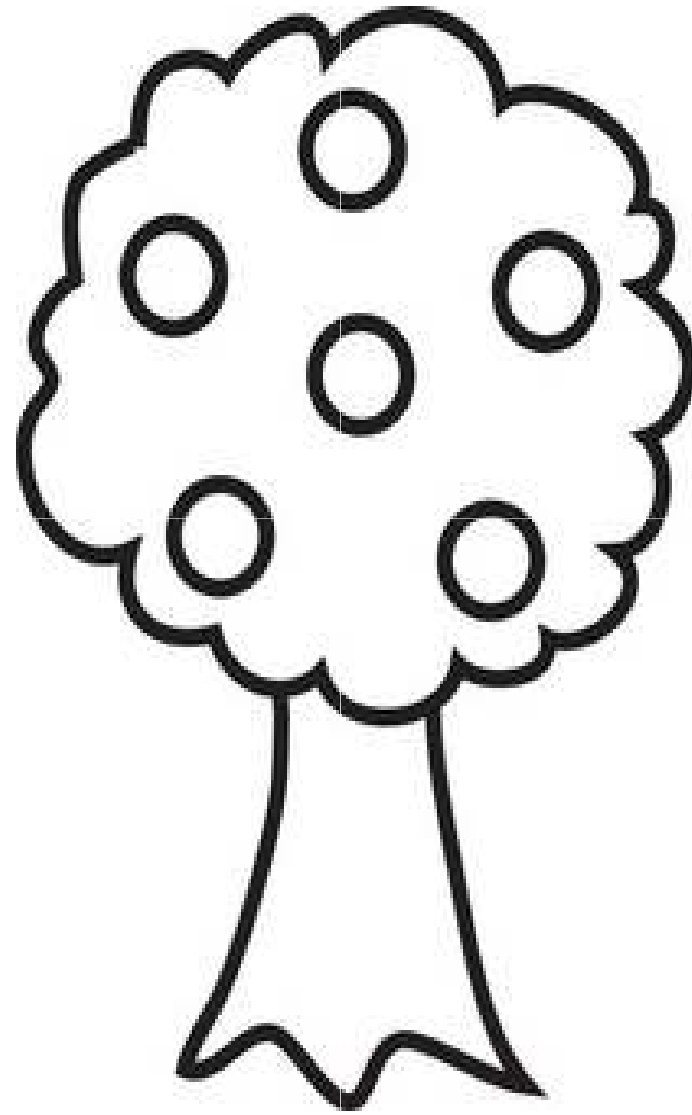
- “Reality is not a function of the event as event, but of the relationship of that event to past, and future, events.”

Robert Penn Warren, “All the king’s men”

The human brain is programmed to understand in context...

- What is this???







Key points of the discussion

Importance of context

Defining context

Context's importance for research

Research from the inside vs. outside

Defining the qualitative case study: A context sensitive methodology

Examples



Importance of context **IN SCIENCE & ART ...**

- Social Sciences: Claude Lévi-Strauss; John Van Maanen
- Humanities: Plato's dialogues bring to the fore insights on the political, erotic, and philosophic of life.
- Art: Picasso, Van Gogh, Salvatore Dali
- Medicine: Alexander Fleming in search of anti-bacteria agents following the first world war

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- Context enhances our understanding and produces INSIGHTFUL & RICH interpretations of phenomena...
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An artistic masterpiece... or



...the most powerful political statement against war

- Historical context: At about 16:30 on Monday, 26 April 1937, warplanes of the German Condor Legion, commanded by Colonel Wolfram von Richthofen, bombed Guernica for about two hours.
- Artistic context: Cubism
- Cultural context: the painting is composed of symbols of “tauromachia” the bull, the horse, the sword. Symbols of folk Spanish culture that make Guernica a war painting. The bull in itself is Spain resisting slaughter.



→ Why context important for studying and understanding IB/IM phenomena???



Consider the following statements:

- “The international management field, by definition, has populations, and therefore contexts, which demand higher levels of contextualization for accuracy of empirical generalization (Tsui, 2004, quoted in Michailova, 2011, p. 130)”.
- “Explicitly reflecting on contextualization of theory is a natural ingredient of IB” (Tung & Witteloostuijn, 2008, p. 181).
- Boyacigiller and Adler (1991): “contextual parochialism” → IB research still suffers from a general failure to capture subtle nuances of differences and similarities, both across and within contexts.

Once again: what is context???

- 1) the circumstances that form the setting of an event, statement, or idea
- 2) the parts that precede and follow a word or passage and fix its precise meaning.
- 3) 'surroundings', 'environmental forces' and 'situational opportunities and constraints' integral to context
- To take something 'out of context' leads to misunderstanding.
- Looking at context in practical terms may take a macro (broad features that differentiate countries) and micro (differences in particular management practices among local work units) view.

Contextualising what and when in IB/IM research?

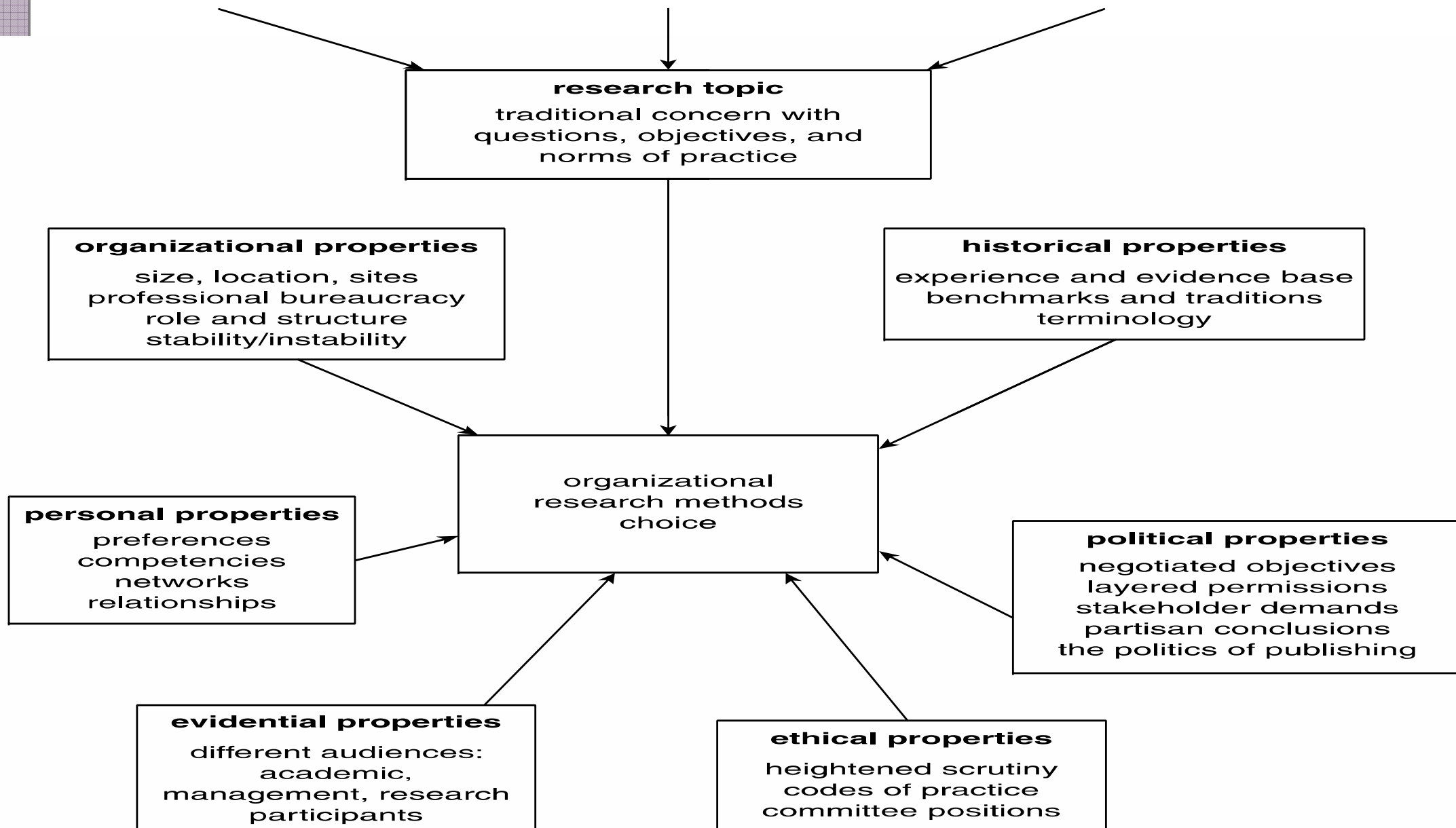
- Contextualising our research questions, theories and analysis
- Contextualising our research team
- Contextualising our research findings and their articulation

AND MOST IMPORTANTLY ...

- **Contextualising our methods** (Michailova, 2011)

Indeed...

- “choice of methods is shaped not only by research aims, norms of practice, and epistemological concerns but also by the combination of organizational, historical, political, ethical, evidential and personally significant characteristics of the field of research” (Buchanan & Bryman, 2007, p. 483 – figure p. 488).
- “Not being able to unveil aspects that are unique to a particular research situation hinders accumulation of knowledge” (Michailova, 2011, p. 135).





Conducting Research from the INSIDE vs. OUTSIDE



- When inquiring from the inside, researchers immerse physically and psychologically in the field, and their fieldwork is often likely to be more intimate, open-ended, contextual and holistic.
- Inquiring from the outside, on the other hand, tends to be less intimate and somewhat more transactional and closed-ended (Evered & Louis, 1981).

Inquiring from the Outside...seeing things from a distance



Cutting them into pieces (... variables???)



Inquiring from the inside: Detecting context sensitivities... similarities and differences



Offers a more holistic account ...





HOW? Is there a methodology that allow us to practice contextual sensitivity & holisticity?

Consider the following definitions...



- 'an empirical inquiry that investigates a contemporary phenomenon in depth and within its **real-life context**, especially when the boundaries between phenomenon and context are not clearly evident.' (Yin 2009, p.18)
- 'a research strategy which focuses on understanding the dynamics present within **single settings**'. (Eisenhardt 1989, p.534)
- 'the researcher explores a single entity or phenomenon...**bounded by time and activity**... and collects detailed information by using a variety of data collection procedures during a sustained period of time...' (Creswell 1994, p.12)
- a choice of what is to be **studied in a context** ... (Stake 2005)
- **WHICH METHOD IS DEFINED ABOVE...?**

THE QUALITATIVE CASE STUDY...



- ***A road less travelled for many IB/IM researchers***

Case Study Designs: The challenge

- “Unlike other research strategies, a comprehensive "catalog" of research designs for case studies has yet to be developed. There are no textbooks, like those in the biological and psychological sciences. Unfortunately, case study research designs have not been codified.” (Yin, 2003, 19-20)

Characteristics of the Qualitative Case Study

- (a) Qualitative data, i.e. textual or visual data.
- (b) Small samples: single or multiple CSs.
- (c) Non-random sample selection: purposeful sampling
- (d) Codes (themes, chronologies) not variables. Holistic understanding
- (e) Presence of context – Naturalistic inquiry
- (f) Confronts theory → have various theorising objectives
- (g) The focus of analysis is the case (organisation, person, event, etc).
The case is the unit of analysis or the heart of the case (as per Miles and Huberman). The approach is case- rather than variable- oriented.
- (h) Fine-grained engagement with the field



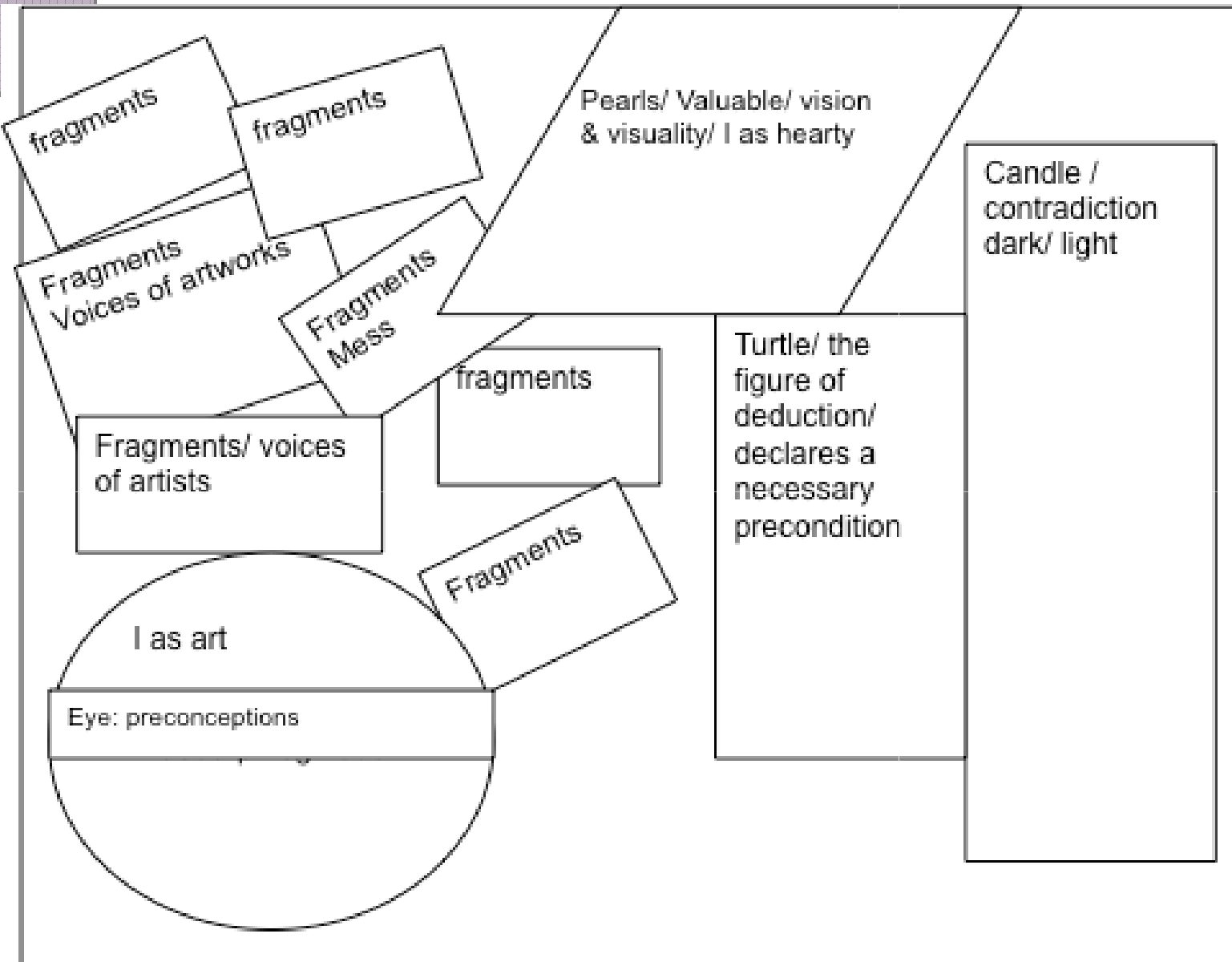
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- Forms of Qualitative Data...
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- Textual data generated from interviews
- Textual data generated from company archives
- Reflexive, textual data generated from consumer diaries
- Unobstructed visual data collected by photography
- Consumer photo- elicitation
- Visual data generated by individuals e.g. Collage or painting

Example...





Connection of images:

- 1. Repetition of theme that connects the image fragments: dualism (mind/body [see eyes and thigh, rational/irrational]).
- 2. Contradictory juxtapositions: represent the chasing nature of contemporary art (see juxtapositions of dark/light, of logical [turtle]/ irrational [fragments of images]).

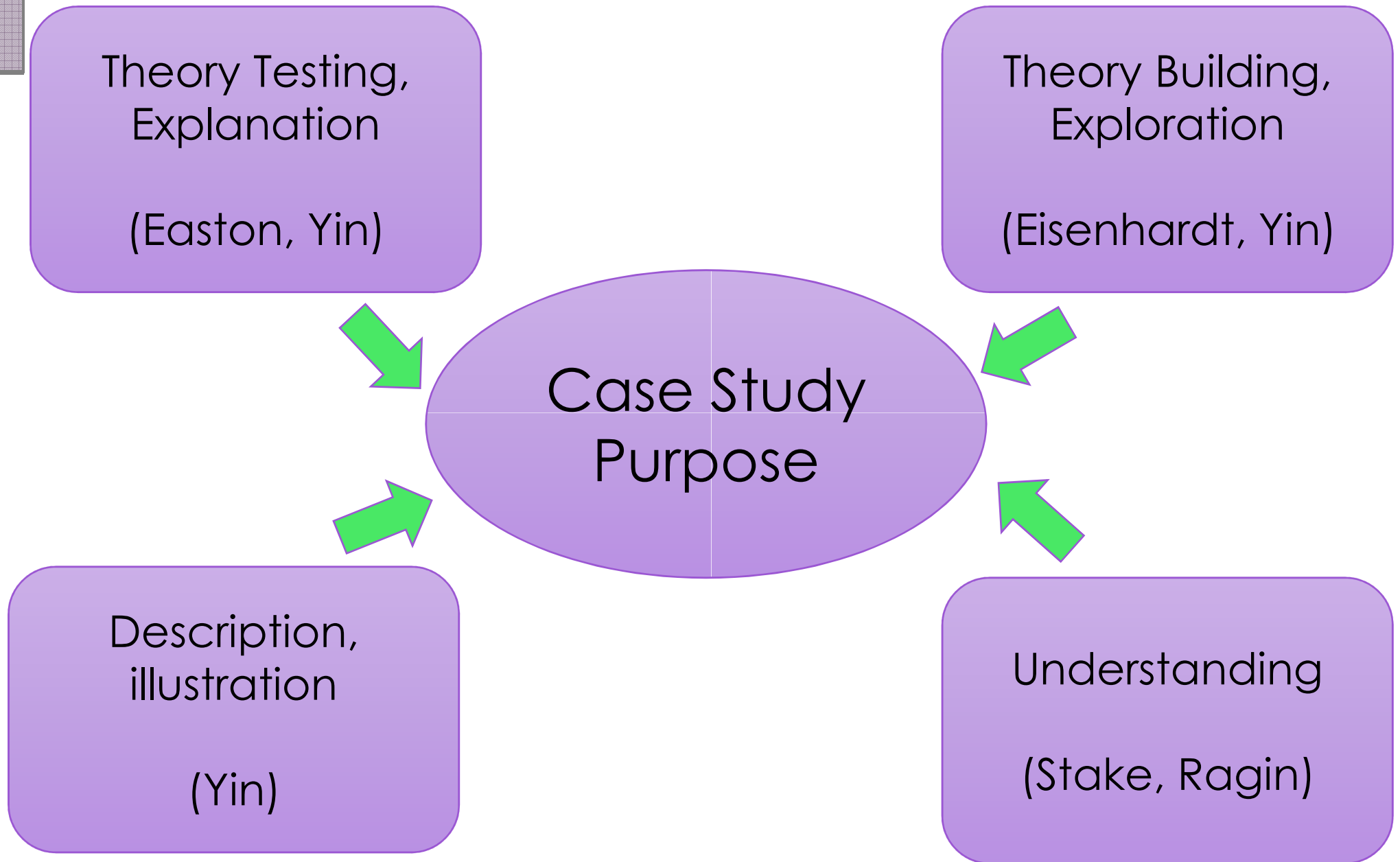


(Closing the parenthesis...)



Unveiling the qualitative case study ...

- ...different research objectives &
- ...different case study perspectives:
the case process vs. the process of casing



The role of context in Case Research...

Structured approach

Ethnographic case

Emerging approach




“Structured” view of case research

- Linear and prescriptive, researcher follows a “blueprint”
- “A logical plan for getting from here to there, where here may be defined as the initial set of questions to be answered, and there is some set of conclusions (answers) about these questions” (Yin, 2009, p. 26)
- Flexibility of case research under-utilised – a priori selection
- Favored by scholars of a “positivistic” tradition e.g. Yin (2009) and Eisenhardt (1989)
- Helps to avoid the situation in which the evidence does not address the initial research questions (Yin, 2009, p. 27)

The case study process...

- Getting Started
- Selecting Cases
- Crafting Instruments & Protocols
- Entering the field
- Analyzing Within-Case Data
- Searching for Cross-Case Patterns
- Shaping Hypotheses
- Enfolding the Literature
- Reaching Closure



Context is
embedded
in every step
of the
process

Example...

- Shameen Prashantham and Charles Dhanaraj (2010) The Dynamic Influence of Social Capital on the International Growth of New Ventures, ***Journal of Management Studies***, 47 (6), pp. 967-994.
- Case study design following Eisenhardt

Context is treated...

- Context is discussed in the case – the case is defined a priori
- It is often presented in the introduction of the paper or a separate section entitled “setting” or “context”
- Context is incorporated in the discussion of the findings
- It not usually incorporated in the research propositions advanced
- Researcher distance herself from context to increase objectivity of accounts
- Sometimes authors are apologetic about context; context is often viewed as a problem or challenge for the generalisability of the findings

The Emergent “Design Logic”

- Flexibility, nonlinearity and evolving case boundaries: process of casing
- Capitalizing on redirections is sign of quality & contextualization...
- May include additional theory, new concepts and redefinition of unit of analysis

Ragin (1992:6): "What it is a case of will coalesce gradually, sometimes catalytically, and the final realization of the case's nature may the most important part of the interaction between ideas and evidence."

- *“Thus casing often involves sifting through empirical evidence to define cases ... Cases often must be found because they cannot be specified beforehand. In some research areas, delimiting the case may be one of the last steps in the research process. And once cases have been found, they may be used to refine or even refute the theory that provided the initial guidance.”* (Ragin, 1992, p. 220)
- In essence, cases are hard to define apriori and are shaped by context!

Example...

- Christine Benedicte Meyer and Ellen Altenborg (2008). Incompatible Strategies in International Mergers: The Failed Merger between Telia and Telenor, ***Journal of International Business Studies***, 39 (3) pp. 508-525.
- The case emerges...

- “This case study of a merger failure is unique in the sense that it reports from a failure to merge, which emerged as we were studying a merger process. ... However, we were not concerned primarily with analyzing why this case turned out to be a failure, but exploring how a particular factor – incompatibility in strategies – created problems from Telia/Telenor merger. The original aim was to discuss the challenges faced in cross-border mergers...” (Meyer & Altenborg, 2008, p. 511).

Context is treated...

- Context is treated as a shaping factor of the case study (very context-dependent)
- The case emerges in the context
- It is discussed throughout the paper – thick description
- Context is not a problem or challenge rather it is an opportunity to theorize
- Context highlights the idiosyncrasies of the investigated phenomena

An additional example

- Fiona Moore (2011) Holistic Ethnography: Studying the impact of multiple national identities on post-acquisition organizations. ***Journal of International Business Studies***, 42, pp. 654-671.

The ethnographic case study...

I was restricted in my ability to select a team; however, the team I worked in was unusually ethnically diverse (compare Tables 1 and 2), which allowed me good access to discourses regarding ethnicity and national culture. To provide the context for subsequent analyses, I will briefly indicate the ethnic makeup of the workforce (adapted from an in-house survey using contract workers, about one-third of the workforce, as an indicative sample) and of the team that I studied.

Moore, p.657

I will here consider how this article has met the study's aims, answered the research questions, and contributed to IB. In terms of the first aim, I have built upon earlier research to show that a holistic ethnographic perspective provides new insights into the operation of tacit discourses of national culture in organizations. While ethnography on

Moore, p.665

Context is treated...

- Experiential mode of research
- The case is context-dependent, the researcher is context-dependent
- The researcher is immersed in the case and its context – unites her voice with the participants
- Emphasis on reflexivity rather than objectivity
- The author writes in the first person
- Holistic, textured accounts

To sum up...

- Context is a vital aspect of any research project – **INHERENT IN DEVELOPING INTERPRETATIONS**
- Need to contextualise our research methodologies ... and ourselves as researchers
- Research from the inside can assist the researcher to develop a contextual understanding
- The case study can be a context-sensitive methodology ... yet there are variants of this context sensitivity
- Context understanding is **EXPERIENTIAL** and varies among researchers

“All our Knowledge has its origin in our perceptions”

Leonardo Da Vinci

“There is never any ending to Paris & the memory of each person who has lived in it differs from that of any other. We always return to it no matter who we were ...”

Ernest Hemingway, “A Moveable Feast”