

COMMENTARY

From a distance to up close and contextual: Moving beyond the inductive/deductive binary

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Abstract

Opening a field to a diversity of methods takes maturity of the field, a supportive infrastructure, and time. Now, in the wake of our 50th anniversary, we can say the IB field has reached a certain amount of maturity. In this commentary, I provide the backstory to this year's big win for qualitative methods – the 2021 Decade Award – and discuss how there has never been a better time for the power of richness from case studies, ethnographies, and a wide range of other types of qualitative research to surface and contribute meaningfully to IB theory.

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I am both delighted and honored that Welch, Piekkari, Plakoyiannaki, and Paavilainen-Mantymaki's 2011 article, Theorising from case studies: Towards a pluralist future for international business research, has won the JIBS Decade Award. Pleased because the authors achieved a great deal by demonstrating the power of case studies for IB theorizing and providing inspiration and direction for researchers to go beyond using the case study solely as a tool for inductive theory-building and to consider and take on its theorizing potential both in terms of generating causal explanations and contextualizing theory. I am also honored because this article was one of eight articles published in the JIBS Special Issue on Qualitative Research Birkinshaw et al. (2011) of which I had the privilege of being not only one of the three special editors along with Rosalie Tung and Julian Birkinshaw, but also the handling editor of this article. This places me in a unique position as invited commentator to provide a backstory of the article review process as well as my own reflections on its enduring contributions. This is where I will start with my commentary and then I will take the opportunity to reflect on where we are a decade later as a field regarding qualitative methods and conclude with thoughts on the direction in which I hope we as a mature discipline are headed.

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THE BACKSTORY OF THE ARTICLE REVIEW PROCESS

I have chosen to start with the backstory of the article for what I think are a few good reasons. First, unless we are the authors of a piece, we rarely are given the opportunity to learn about the review process as a positive developmental experience. It seems most scholars consider this process a necessary evil of getting published, and it seems most reviewers think of their task as a somewhat begrudged time taking obligation to support the field. This brings me to the second and more important reason for providing this story. The review process is designed to help authors make their strongest, most impactful, innovative, and insightful contribution to the field. This awardwinning paper is an exemplar of this positive developmental intention succeeding in coming together to provide path-breaking and enduring contributions to international business research. My third reason for starting with this backstory is that the challenges given these authors in the review process and the thoughtful and eloquent ways in which they met them are a source of learning for all future contributors to the journal.

Let me start the backstory by stating clearly that the original submission (the front story, as it were) was very well written – clear in its intent, message, and organization. It also offered timely methodological insights that each of the reviewers recognized as important for helping the field move forward in tackling real-world phenomena with multi-method open-minded, interdisciplinary, approaches (advocated in the JIBS editorial by Cantwell & Brannen, 2011). With quantitative survey and archival research being the dominant methods in IB, the authors offered significantly enhanced and sophisticated ways for researchers to contribute to IB theory by getting up close and contextual through case study research.

Two of the challenges the authors had were typical of interdisciplinary and methodologically non-mainstream submissions. As such, I will start with these and share the ways in which the authors handled them. The first challenge was that of unfamiliar language. The authors were lucky in that their reviewers and I were familiar or at least open to the initial arguments made in the paper around the limits of the Eisenhardt "positivist circle" and the value of contextualized explanation. Not all authors are as lucky in the selection of reviewers they get. For the average reader of JIBS, unfamiliar

with qualitative methodology and case study research, much of the intended contribution as was presented in the originally submitted article would have been lost. Again, this was not due to the quality of the writing, but due to the complexity of the argument and the disciplined-based terminology outside of the standard IB lexicon. For example, whereas most scholars from whatever disciplinary orientation have come across the term "hermeneutic" at one time or another, it is doubtful that the average JIBS reader untrained in philosophy, sociology, or critical theory would be fluent enough in their understanding to readily intuit what might be meant by a "double hermeneutic." As such, the review team encouraged the authors to clearly define such terms at their first usage which they did quite elegantly in this instance - "all research is an interpretation of an already interpreted world" (Welch et al., 2011: 744). Of note, even words that are commonly used in one discipline may in fact have slightly varied meanings across other disciplines. These words are taken for granted, and are therefore at the highest risk for missed meaning. The challenge was further pronounced in this case by the difficulty in trying to convey philosophical underpinnings of research methods at odds with, or at least novel to, readers who would predominantly be attending the piece from a positivist perspective and training. The way out of this cross-disciplinary quagmire, which the authors managed with thoughtfulness and sophistication, is to position oneself paradigmatically at the onset of an article and define key terms clearly especially when there are likely to be disciplinary differences in understanding and usage. Examples of how Welch, Piekkari, Plakoyiannaki, and Paavilainen-Mantymaki's managed these include: identifying themselves as critical realists in the fifth paragraph of the introduction and explaining that their views on theorizing from case studies are therefore heavily influenced by this perspective; defining even what would appear to be obvious terms such as context, theory, explanation, and causation from within their perspective.

The second challenge, also common to interdisciplinary submissions, is to make explicit the relevance and criticality of the study to the field of international business. Oftentimes authors think that the link between what they are studying and the domain of international business is readily apparent, but for an article to make a strong contribution and have far-reaching consequences to IB research, authors need to situate the major



theme of the paper in the context of the IB discipline. This was done deftly by Welch et al. by linking their call to contextualized explanation as a mode of case-based inquiry to the dual need in IB theorizing of developing robust explanations of complex phenomena while ensuring that the theory is sensitive to diverse national (and, I would add cultural) contexts.

The final challenge the authors needed to face was one particular to studies that look like literature reviews. A thorough and timely literature review is a clever publishing strategy - readily utilized by scholars as a handy shortcut to catching up on an area of scholarship and a sure way to amass citations quickly. However, apart from the annual Review Issue, the editorial policy of IIBS available on the Palgrave website states that, "JIBS does not publish manuscripts about teaching materials/methods, literature reviews, or manuscripts aimed solely at a practitioner audience (emphasis mine)." You might then ask why do the last two decade-award winning articles look like literature reviews (Stahl et al., 2010; Welch et al. 2011)? This is because they are far more than just review articles. The 2020 award-winning piece went beyond a well-executed meta-analysis with hypothesis testing on 10,632 multicultural work teams to reconcile conflicting perspectives and contribute to a better understanding of the mechanisms and boundary conditions under which diversity affects teams. Our current 2021 award-winning article is itself a meta-analysis, but not a quantitative one. In applying textual content analysis on the 199 qualitative case studies that had been published in JIBS, AMJ, and JMS over a 10-year time period, the article is not just about, but is in and of itself an excellent example of qualitative research. The remaining hurdle here for the authors to get over was to make this more transparent at the start of the paper and to explicate their methodology in a robust fashion. They skillfully accomplished this by providing a thorough explanation of the method of qualitative textual analysis they used to theorize the uses of case studies in IB research and to synthesize the literature into a thoughtful typology.²

FURTHER REFLECTIONS ON THE ARTICLE'S CONTRIBUTION TO IB

Beyond the many contributions of the article already mentioned is the way in which the authors provide a pathway out from the inductive/deductive binary logic of theorizing proliferated in our

field. The authors don't mention this as an explicit contribution, but in their own analytical method, they model a mid-range type of non-linear, iterative, theoretical reasoning put forth as "abductive reasoning" (Peirce, 1974; elaborated in Van de Ven, 2007, Saetre and Van de Ven, 2021). By starting with an anomaly - the seeming incompatibility of case studies being able to generate causal explanations and at the same time provide contextual richness – two conditions of theorizing particularly important to IB research, and by building a research agenda around understanding how to reconcile this anomaly the authors exposed a fault in our understanding of the power of case study research in IB and illuminated a path towards a more pluralist future for case studies in IB research.

WHERE ARE WE NOW AS A FIELD REGARDING QUALITATIVE METHODS?

The metaphor of Sisyphus rolling a giant boulder up a mountain comes to mind when I think of the effort it has taken to awaken the IB field methodologically beyond traditional positivist methods. Though unlike Sisyphus's case, ours has rather been a collective effort. I recall the standing-room-only session at the AIB in Milan in 2008 on qualitative research which was chaired by Rebecca Piekkari and Catherine Welch – two of the authors of this article. One could feel the pent-up energy and excitement in the room reveling in a whole plenary session devoted to qualitative research! Lorraine Eden played a very large role as Editor-in-Chief of JIBS at that time, as it was she who championed the idea for the Qualitative Special Issue. I remember her approaching me at the AIB in San Diego in 2009 as to whether I would agree to serve as one of the Special Issue editors. I was astonished both by the topic, as qualitative pieces were by no means the orthodoxy at JIBS, and that she asked me, as I had only published once in JIBS at that time and, though the article was based on an ethnographic study, it was a decidedly mixed-methods piece with quantitative triangulation (Brannen & Peterson, 2009). I recall Lorraine saying that my "little Mickey piece" in AMR (Brannen, 2004) was an important piece for IB and she'd like to see such articles published in JIBS. All involved in the planning for the Special Issue (SI) had reservations as to whether there would be enough qualitative researchers in the AIB community who would submit papers to the call (I too had spent most of my career never dreaming that I'd get a paper published in JIBS). But, in fact, the Qualitative SI ended up getting an unprecedented number of submissions for an SI (115 to be exact!) and each piece that was published in it has been well cited and, in some cases served to catalyze people's careers! What's more, the SI introduction itself cowritten by Rosalie Tung, Julian Birkinshaw, and me has been cited over 700 times. I don't know if that is a record, for an SI introduction, but it's impressive and just goes to show how timely and, perhaps, longed-for it was. That SI, like the language SI in 2014 (which also received a significant number of submissions – 78), was basically like unblocking a dam of methodological creativity and pluralistic theorizing for the IB field.

Over the last 15 or so years, there has been a marked increase in qualitative articles published in JIBS. Indeed, 48% of all qualitative papers were published from 2005 to 2019 (Nielsen, Welch, Chidlow, Miller, Aguzzoli, Gardner, Karafyllia, & Pegoraro 2020) with a much wider range of qualitative approaches and traditions represented including phenomenology, critical discourse theory, narrative inquiry, and a plethora of other types of small N studies. Indeed, ethnography, which has been the most curiously missed qualitative approach in IB given the centrality of culture to the field, has shown its face. Notably, the first three articles in the Qualitative SI were in fact ethnographies (Caprar, 2011; Yagi & Kleinberg, 2011 and Moore, 2011), and more have been trickling in for submission - at least one of which has been accepted for publication (Bohas, Morley, & Akinra, 2021).

Why then in the wake of such built-up momentum in terms of methodological pluralism does the most recent review of methodologies used in IIBS reflect a starkly different story (Nielsen et al. 2020)? The authors tell us that a combination of largescale, longitudinal, cross-national data availability and highly developed software and skillsets in complex analytical techniques has led to archival quantitative studies dwarfing all other types of methodologies published in JIBS. The pressure to publish early and copiously must also have contributed to this as readily available data sets one can analyze without leaving home certainly offer more timewise efficiency than the primary data gathering methodologies fundamental to most types of qualitative research. However, in the continuum of "from a distance to up close and contextual", it is not possible to get any farther away from the research subject than archival studies. Nielsen et al.

(2020) offer triangulation as a way out of this conundrum, arguing that entrenched paradigmatic barriers to innovation and diversity threaten the rigor of IB research. I would add that this trend toward quantitative archival studies also threatens the relevance of our research to attend to the complexities of leading and managing international companies across distance and differentiated contexts with constantly changing workplace demographics due to unparalleled migration and pressing worldwide externalities such as climate change, the depletion of global stocks of natural resources, and the COVID-19 pandemic, just to name the most obvious. Another side effect of paradigmatic entrenchment in a discipline is that there is less guidance, few templates, less qualified reviewers, and generally more uncertainty around writing up research from outside the main paradigm. In hopes of helping us out of this methodological sclerosis and to encourage deeper, more contextually situated and holistic theorizing about culture in our field, I offer the following thoughts on ethnography in international business and pointers about writing it up into journal article length, which is always a big stumbling block for ethnographers.

ETHNOGRAPHY IN INTERNATIONAL BUSINESS

Understanding how culture affects international business phenomena such as foreign direct investment, mergers and acquisitions, market entry, technology transfer, global teaming, and a multitude of other organizational processes is critical to IB scholarship. Yet, armed with only superficial measures of national cultural differences proliferated by easy-to-use, statistically testable cultural dimensions offered by aggregate values-based models of culture (e.g., Hofstede, Schwartz, and The Globe study), IB scholars find themselves stereotype rich and operationally poor where culture meets IB context. Such quantitative data give few insights into the challenge of understanding the cultural phenomena in context. Even the term "culture" is most often used synonymously with national culture in IB, even though it is a multifaceted and complex construct involving the coming together often of various spheres of culture including national, regional, institutional, organizational, functional, etc., enacted by individuals on an ongoing basis. Research settings in international business are therefore rife with multilevel cultural interactions due to diverging cultural assumptions



brought together in real time by the merging (often virtually) of individuals (often multicultural themselves) across distance and differentiated contexts. Consequently, traditional positivist approaches to understanding culture fall short of adequately capturing the complexity of cultural phenomena in international organizations.

Ethnography with its two essential elements fieldwork, including its central methodological building block of participant observation, and its focus on culture - is the most effective method for gaining insights into such microlevel embedded cultural phenomena. Triangulation is intrinsic to ethnography - both within and between method triangulations. The former is perhaps most well known to those outside of anthropology and includes primary data collection involving extended immersion at the research site, observation, interviewing, as well as secondary data collection in the form of artifacts, documents, and reports, and each of these techniques is further triangulated using many of the methods suggested by Nielsen et al. (2020), including analytical, theoretical, and investigator triangulation. Less known is the use of between-methods triangulation in ethnography. However, multi-method triangulation such as by conducting a follow-up survey (e.g., Brannen & Peterson, 2009), using social network analyses (e.g., Salk & Brannen, 2000), or conducting multiple comparative case studies (e.g., Fruin et al. 1999) are especially well suited for extending ethnographic theory building in the complex cultural research settings commonplace in international business.

Much more than a method, ethnography is both the representation (usually written) of cultural understandings and practices held by others and, a logic – a way of knowing and the sort of knowledge that ensues from such a process of inquiry. Ethnography is iterative, improvisational, and recursive, and decidedly not procedural. It is path-dependent in that we learn more about the subjectivity and intentionality of those we encounter in the field well after our work is begun and, the longer we are at it, the more we learn about what we need to learn next. Our knowledge accumulates and changes over time as we come closer to understanding the perspectives – points of view – of the people from whom we are learning.

From the perspective of the context of international business, recent changes such as the ubiquitous use of virtual teams (only becoming more pronounced in the current context of the current

pandemic), and changing workplace demographics due to the ongoing increases in migration and mobility, have led to a situation where physical distance between cultures is decreasing, while the complexity of cultural interaction is increasing. Such changes have only pushed to the forefront what anthropologists and other close observers of culture have always known. From a distance, meanings, and people's sensemaking patterns, might well be seen as commonly shared by a cultural group while differences across cultures are seen as great. However, up close, when individuals with varying pre-conceptions (thanks in large part to globalization and the Internet) about each other's multiple cultures (national, regional, suborganizational, etc.) and contexts (institutional, organizational, occupational, etc.) attempt to transfer, synchronize, learn from, and even co-create, the use-value of aggregate level cultural frameworks begins to seriously break down (Brannen, 2004; Brannen & Salk. 2000).

As these examples illustrate, ethnography has ventured outside of the realm of anthropology to induce relevant and cutting-edge theory in organizational settings. However, it has rarely been used in international business research. This is in part due to the difficulty of conducting ethnographic research in one's home culture, let alone abroad often in a foreign language, and due to the timecommitment involved in transcribing, translating, coding, and analyzing the data. These barriers are of course exacerbated by the bias toward positivist, large-scale quantitative deductive studies in management research in general. Nascent and evolving contexts such as changing geographical boundaries, emerging markets, countries with economies in transitions, new workplace demographics such as people with mixed cultural origins (for example, biculturals, multiculturals, and global cosmopolitans) are the sine qua non of international business. As such, ethnographic method has much to offer international business research especially in today's globalized business context.

Although ethnographies in IB have been historically rare, the lion's share of submissions to the JIBS Qualitative SI were ethnographic. In fact, as stated above, the first three articles of the issue were based on ethnographies. Since then, interest in ethnography on its own or in mixed-methods studies as well as the number of PhD dissertations using ethnographic methods in IB have been on the rise. In fact, the plenary keynote at the 2020 AIB annual meeting, attended by over 3000 members,



was on ethnography delivered by John Van Maanen – the pioneer of ethnography in organizational studies – in which he emphasized the relevance and importance of ethnography for international business research. Indeed, crafting journal articles from ethnographic monographs is no small endeavor. Here are a few thoughts and suggestions.

Different Forms of Writing up Ethnographic Research in IB

Firstly, even though journal articles are the name of the game for getting tenure these days, don't shy away from publishing your ethnography as a monograph. This is the proper home for such an endeavor and the best form for providing a holistic account of your research (see for example, Moore, 2021 for a recent exemplar in IB). The richness of the ethnographic process provides ample fodder for discrete journal articles. For example, ethnographies often surface novel constructs or the "what" behind a research question (see for example, Caprar, 2011 on redefining and furthering our understanding of what constitutes a 'host country national'). They can generate propositions which then can be tested deductively by larger scaled cross-sectional studies (see for example, Thomas et al., 2010 testing propositions on the intercultural effectiveness of biculturals). Ethnographies can also generate process models or the "how" behind the research question (see for example, Yagi & Kleinberg, 2011 on negotiating and leveraging crosscultural identity). Such models can be imbedded in a conceptual piece to advance the field in its understanding of the dynamics of cultural phenomena (see for example, Salk & Shenkar, 2001 on social identification in international joint ventures). Further, there might be a practitioner piece that could evolve from a focal ethnography (for example, Hong & Doz, 2013; Brannen & Doz, 2012; Brannen, Moore & Mughan, 2013) as well as a methods piece in cases that new frontiers in data collection and analyses were forged (see for example, Brannen, 2011 on using multiple case studies to generalize from ethnography).

Challenges

There are no templates for writing up ethnography and no established standard for analyzing and presenting data. The sheer bulk of data, often hundreds of pages of fieldnotes, thousands of pages of interview transcripts, and an abundance of secondary documents, is a challenge to manage. In addition, the research process is characteristically uncertain. To add to this is the language challenge especially in IB research. Often there is a disconnect between the language in which the research was conducted and the language in which it is written up which is often English. This can be seen as a stumbling block or limitation, but it can also be an opportunity to introduce a more refined reflection on the data (Steyaert & Janssens, 2015).

Getting through the Review Process

Make sure to motivate the study in the IB discipline. Doing so should not be difficult as the central focus of ethnography is on culture, a central construct in IB. In addition, ethnographies are well suited to understanding novel phenomena and as IB is a phenomena-driven discipline, this is a good match. Further ways to motivate an ethnographic study is if it addresses a paradox, anomaly, or goes against existing IB theory.

Be explicit about context. One of the strongest aspects of ethnography for robust theory building is its external validity. An ethnographer intimately knows her research site – the people, the place, the setting, the internal dynamics, the external environment, so make sure to convey this clearly through representation in writing. Justify the context in the IB discourse – is it an event, type of environment or situation that is critical to understand for IB scholars and practioners? Is it crosscultural, multicultural, or intercultural, and how does this relate to IB theory? This will go a long way in establishing the trustworthiness of your findings (see Cuervo-Cazurra, Anderson, Brannen, Nielsen, & Reuber 2016).

Don't rely on shortcuts such as simply citing the Gioia template to sum up your approach or justifying your lack of a detailed literature review by citing grounded theory (Glaser & Strauss 1967) as if any scholar could come to a field site 'tabula rasa' without any preconceptions about what they might find. The Gioia template can certainly aid you in your journey from field data to theoretical understanding (see Gioia and Corley, & Hamilton 2013 for a useful discussion). Grounded theory is a critical aspect of interpretive methodology using the constant comparative method to continuously contrast what you see in the field with what you 'know' from the literature. In fact, this is precisely from where the 'aha' moments in ethnographic theory building emerge. However, ethnography is a creative, iterative process that is idiosyncratic to the researcher and therefore each research process is



unique, and as such, you need to tell the reader what was unique about yours. Ethnographic research is characterized by diverse and continuous data collection over significant amounts of time, so special attention should be given to explaining the research design. Show how you ensured the quality and robustness of your data. Describe why you chose the research site, how you selected the people you observed and interviewed, and what type of within- and between-methods triangulations you employed.

Finally, regarding writing up your empirical analysis and findings. Be transparent. Come clear regarding your stance as a researcher - your philosophical perspective, your research paradigm, as it were. Tell us how you made sense of your data including the links made between what you experienced and existing theory and any struggles you had in navigating between them. Share how you navigated multilingual and multicultural boundaries. In what language(s) was the research conducted? Provide insights regarding the cultural identities and the linguistic facilities of key subjects as well as yourself (and the research team) and how these might have affected the data and analysis. Be reflexive. This is especially important in ethnography, as the researcher is the research instrument whose subjectivity is the lens through which the account is perceived and the vehicle through which it is represented in writing.

GOING FORWARD/WORDS OF HOPE

Opening a field to a diversity of methods takes maturity of the field, a supportive infrastructure, and time. Now, in the wake of our 50th anniversary, we can say the IB field has reached a certain amount of maturity. As far as infrastructure, much progress has been made to widen the research expertise of the JIBS editorial board to include deputy editors, associate editors, and area editors who are not only open to, but schooled in alternative research methods. With each year additions are made to the editorial review board of scholars coming from more diverse research traditions. We still have a long way to go, but the backstory I've told here of the "small wins" leading up to this year's big win – the 2021 JIBS Decade Award – goes to show that there has never been a better time for the power of richness from case studies, ethnographies, and a wide range of other types of qualitative research to surface and contribute meaningfully to IB theory.

NOTE

- 1 See also the discussion on trusting findings in interdisciplinary, mixed methods, research in Part IV of Research Methods in International Business (Eden, Nielsen & Verbeke, 2020) especially Brannen, Cuervo-Cazurra & Reuber (2020, ibid: p. 166–167) on methodological ambidexterity in the research review process.
- 2 This method of theorizing from qualitative textual analyses of literature reviews is under-utilized yet quite powerful in moving a field forward to further levels of sophistication. In our field, see also Brannen and Mughan (2016) who used this method to trace how the construct of language has been used in the IB field historically and to suggest future directions for research focused on language in IB.

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ABOUT THE AUTHOR

Mary Yoko Brannen As an organizational ethnographer, Professor Brannen seeks to understand the effects of multiple cultural contexts on individuals and organizations in which they are employed. How do language and culture affect today's complex cultural organizations and their employees? What are the effects of migration and mobility on today's workforce? Through understanding the challenges and skillsets of this new demographic, her work sheds light on the many opportunities they bring to organizations.

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