Embracing qualitative research: an act of strategic essentialism

Raza Mir
William Paterson University of New Jersey, Wayne, New Jersey, USA

Abstract
Purpose – The purpose of this paper is to argue that rather than contest the artificial schism produced by social scientists between "qualitative" and "quantitative" research, we should accept this binary, however, contingently, and use it productively. This would be an act of "strategic essentialism" that would allow us to be productive in the research and inquiry.
Design/methodology/approach – The paper uses postcolonial theory to make a case for contingent representation, i.e. using artificial categories to carve out a space for heterodox theoretical approaches.
Findings – Researchers devoted to qualitative research must resist thinking, speaking and evaluating that research using quantitative thinking. Also, while ethical considerations are paramount in qualitative research, we need to debunk the narrow understanding of ethics as "following rules." Also, qualitative researchers need to be aware of the institutional pulls that the research will be subject to, and also be ready to resist them.
Originality/value – This paper discusses how good research resists the siren call of institutionalization. It challenges the "common sense" assumptions of the field and brings them into the realm of the questionable. It seeks to theorize the untheorizable, and anthropologize the dominant.
Keywords Institutions, Qualitative research, Ethics, Strategic essentialism

It is perhaps very instructive to realize that by the yardsticks used by social science research of the twenty-first century, Charles Darwin, Karl Marx and Sigmund Freud would be considered “qualitative researchers.” While that is impressive company indeed, it highlights the fact that the binary division of empirical social science research into water-tight components named “qualitative” and “quantitative” is an act of discursive violence. “We must not imagine,” Michel Foucault had declared in his essay The Order of Discourse, “that the world turns towards us a legible face, which we would have only to decipher; the world is not the accomplice of our knowledge; there is no prediscursive providence that disposes the world in our favor.” In his ringing words, “we must conceive analysis as a violence we do to things, or in any case as a practice that we impose upon them” (Foucault, 1983, p. 127). To that extent, it will not be unreasonable on our part to advance the idea that the act of splitting empirical research in the social sciences into “qualitative” and “quantitative” camps is an act of discursive and epistemic violence.

Perhaps the origin of this violence can be traced to the “Vienna Circle,” a group of logical empiricists that was formed in the first part of the twentieth century, and formalized the laws that we now know by the term “logical positivism.” Driven by a sense of “natural science envy,” the logical positivists sought to find natural progressions in social phenomena. (It is a different matter that natural scientists eventually realized that their practices too had a cultural character (Latour and Woolgar, 1986)). In their desire to create binaries, the positivists privileged erklären (the search for a causal explanation for phenomena) over verstehen (a more interpretive understanding) (Uebel, 2012). Eventually, social sciences began to be dominated by a “statistical turn,” whereby even descriptive statistics were considered inferior, and the active manipulation of large sample data through increasingly sophisticated statistical methods became a marker of legitimacy. Qualitative research became a term that was deployed to use all modes of inquiry that did not deploy analytic statistics, and carried with it the stigma of illegitimacy. In a world dominated by patriarchy, qualitative research was also feminized (Acker, 2001). Its acts of intellectual
production began to be subjected to greater scrutiny, influential journals refused to publish qualitative work, and researchers in specific traditions of inquiry found themselves losing out on jobs, tenure and promotions. The word quickly spread, qualitative research was harmful to careers.

Time of course is the great leveler. After close to a century of this methodological warfare, we find that the most interesting acts of theory building in multiple social sciences (including management and organizational studies) have come from the world of qualitative research. The celebrated certitude of the natural sciences turned out to be an act of social construction as well, and the conflation of correlation and causality in inferior quantitative work was indicted as the source of egregious cases of stereotyping, discrimination and sloppy inquiry. In the twenty-first century, we find ourselves back at square one, having to renegotiate the order of things in empirical research.

QROM of course prides itself on its role as a heterodox journal, and several articles in this journal (see Cassell and Symon, 2015, for a review, and Gobo, 2017, for a response in a lively debate). In this paper, I do not attempt to provide a solution to the conundrum of the role of qualitative methods in organizational inquiry. In fact, my aim is to do the opposite, which is to accept this binary, however, contingently, and use it productively. In doing so, I am appropriating a term from postcolonial theory called strategic essentialism. Proposed first by the theorist Gayatri Chakravorty Spivak (Spivak, 1988), strategic essentialism involves the appropriation of artificial categories and representations, with the aim of transcending them at a later stage. For example, “a woman” may choose to speak for “women,” knowing fully well that the category of “woman” is simply too broad for such a representation to be authentic. However, if the category is a subaltern construction, representation becomes an ethical act. By speaking for women, a woman can challenge patriarchy. In a friendlier environment characterized by solidarity, this category can be unpacked. But in many situations, acts of representation may be ethical.

In such a spirit, let us appropriate the label of qualitative researchers, whatever baggage the term may carry for the moment. We can then ask the question, how can we make ourselves effective? Tactically, how can we ensure that our identity as qualitative researchers does not harm our careers and academic reputations? In particular, my purpose in this paper is to ask, how can interpretive and critical qualitative researchers present themselves as legitimate, publish their work in top journals and still remain true to their objective? My discussion has partly been inspired by my experiences over the past two years co-editing The Routledge Companion to Qualitative Research in Organizational Studies (Mir and Jain, 2018). The rest of this paper comprises three parts. The first involves a very brief discussion of the philosophical foundations of qualitative research. The second is a personal detour that might be instructive to researchers who are starting their careers with a qualitative orientation. Finally, I look at the issues confronting qualitative researchers from an institutional perspective, and suggest ways forward for them as they proceed with their inquiry.

**Philosophical foundations of qualitative research**

In their 1980 paper titled “The case for qualitative research”, Gareth Morgan and Linda Smircich put forward the suggestion that research methodology should be seen as a function of epistemological and ontological orientation rather than a mere choice of techniques (Morgan and Smircich, 1980). In a sense, their work continued from the assertions made by Gibson Burrell and Gareth Morgan in their 1979 opus Sociological Paradigms and Organisational Analysis, that ways of thinking underlay methodologies, and that researchers’ philosophical and political attitudes determined their approach to the definition, analysis and explication of socio-organizational issues (Burrell and Morgan, 1979).
While a detailed discussion of the philosophical foundations of qualitative research is beyond the scope of my discussion, I would like to make a few observations about certain concepts that animate discussions of qualitative research, and research in general. The purpose here is not so much to explain these concepts as it is to ask for a greater level of transparency on the part of qualitative researchers in examining the philosophical assumptions that underpin their research. Whether we like it or not, each one of us is a philosopher, going about our life and research with a fundamental set of assumptions. Making them clear will help readers understand where we are coming from, and in turn whether to accept or challenge our findings.

At the very outset, research needs to be present as falsifiable. The opposite of falsifiable research is tautological research, which can neither be disproven, nor can produce findings that are either interesting or counterintuitive. Many times, researchers may use normative language to define a problem, thus, rendering the problem statement unfalsifiable. For example, one could say, “If all employees in a firm work selflessly, performance will improve.” Clearly, such a statement is neither empirically researchable nor falsifiable. A surprising number of research projects in our field do get away with such approaches, often through the creation of spurious proxies for unfalsifiable terminology (perhaps, in this case, through the representation of some construct as a stand-in for “selflessness”). One very important element of falsifiability also includes the articulation of fundamental assumptions that underpin the research. Research that does not clarify its assumptions also runs the risk of becoming ideological, or a vehicle to universalize the interests of a small subgroup in the organizational realm (say, top managers) as the interest of the whole.

Likewise, good researchers always clarify their ontological assumptions. Ontology is defined as a study of the nature of reality. Do we consider entities that we study as existing independently of our inquiry? For example, the ontology of positivism is predicated on the assumption that reality exists independently of our inquiry. Researchers are nothing more than archeologists, sifting through rubble to find nuggets. This of course begs the question, do constructs (such as market share or firm performance) exist independently of our research? Irrespective of where one stands, one needs to make their position explicit.

The clarification of epistemological assumptions is equally important. Epistemology refers to the nature of knowledge. Ontological and epistemological assumptions tend to be correlated, to that extent, a philosophical position such as positivist, realist, critical-real or constructivist refer to closely banded ontological and epistemological assumptions. Positivists (and to some extent realists) may be visualized as holding a flashlight in a dark room. They illuminate different aspects of existing reality, while throwing others into the shadows. Enough flashlights and the entire room becomes visible and mappable. Constructivists, on the other hand, see reality as a lump of clay that the researcher then fashions into a shape, and the reader interprets. Both the researcher and the reader engage in independent acts of creation, producing constructs that derive their legitimacy through construction (ROE is a measure of firm performance because enough management academics agree that it is. To an environmental activist, it may be a pointless artifact, and to a labor organizer, it may even be a symbol of poor performance).

Researchers must also analyze the much used but rarely understood concept of methodology. The term methodology is much broader than mere method. A method is a tool or a technique that is used in the process of inquiry. However, methodology needs to be used specifically, as a way to express an “intricate set of ontological and epistemological assumptions that a researcher brings to his or her work” (Prasad, 1997, p. 2). Methodological approaches are closely associated, therefore, with ontological and epistemological positions, as well as ways in which researchers plan to bring rigor to theory research, and the analytical approaches they bring to bear in the analysis of their data. It is here that
qualitative researchers need to develop their own standards of what constitutes rigorous research in specific methodological traditions.

At this stage, however, a few clarifications are important. Often, the research traditions of our field succumb to the temptation to evaluate qualitative research according to templates that have been developed for large sample research. It is tiresome for qualitative researchers to encounter queries about reliability and validity from journal reviewers. Ethnographers are tripped up about issues of “generalizability,” while issues of “falsifiability” are directed against hermeneuticians. One political question that continues to animate research in the social sciences relates not to higher order constructs like “wisdom,” “knowledge,” or even “information,” but that lowly term “data.” What constitutes data in social environments where the signal-to-noise ratio is way lower than in the neater laboratories that cause us to (misinformedly) envy our counterparts in the natural sciences? We may have finally declared an uneasy truce in the methodology wars between the qualitative and quantitative approaches. But debates about the legitimacy of what constitutes “data” have continued to rage in a variety of spheres. Often, the interlocutors of a new approach are those who constitute the canonical tradition from which the new technique emerges. For example, to stay within qualitative research, consider the emergence of the technique of ethnomethodology in sociology (it has since migrated to a variety of social sciences, including management studies). Traditional sociologists initially derided ethnomethodologists for their needless focus on the quotidian. What could be learned from watching people go about their work, with no triggering events? However, the latter painstakingly staked out a claim that the most commonplace and regular social activities were worthy of being considered research data since they provided links to the organization of society (Garfinkel, 1967). Eventually, management researchers like Henry Mintzberg used ethnomethodological approaches to develop definitions of management that enriched our field.

It is at this juncture that I wish to make a clear schism between two separate meta-traditions of qualitative research. The first is what may be termed positivist qualitative research. Here, the researcher, while not using statistical techniques, subscribes to the same criteria of validity, reliability and falsifiability as mainstream quantitative research. There is an easy conversation between qualitative and quantitative researchers as long as they subscribe to the same philosophical positions. Such qualitative researchers get their work published easily in top journals, and have even developed templates by which their work can be compared, such as the “Eisenhardt methodology” (Eisenhardt, 1991) or the “Gioia methodology” (Gioia, Corley and Hamilton, 2013). The shorthand used by these researchers is that qualitative research can be used for inductive theory development, and quantitative research is more suitable for deductive theory confirmation, which further adds binaries to the epistemic mix. Such research does not face any major legitimacy concerns in the mainstream, though it is also feminized by the academy. My paper is not concerned with such qualitative research. I am rather more interested in non-positivist strands, which traverse the length between interpretive and critical research. Non-positivist research negotiates an uncertain terrain, where its legitimacy is challenged in several ways, including by the deployment of positivist qualitative research as an alternative. Journal editors routinely reject interpretive work on the grounds that “we are already publishing a fair amount of [that] qualitative research,” and subject it to relatively incommensurable (and hence unfair) evaluative criteria. A worse fate lies in store for critical anti-positivist research, which is further castigated on the grounds that it is “anti-management.” To that extent, epistemological and ontological assumptions become matters of life and death for qualitative papers. One sure way to kill an interpretive or critical paper is to subject it to positivist evaluative criteria.

Equally important, we must consider the issue of axiology, or ethics. Qualitative researchers must necessarily hold themselves to higher ethical standards than quantitative
researchers, for the simple reason that they are dealing with human respondents, who engage with them in an atmosphere of trust and mutual sharing. Issues of gaining access, transparency of objectives and ways in which research findings will be shared with informants constitute an important element of ethics. Of course, the issue of ethics carries its own set of ambivalences. Some of the best research works have been carried out surreptitiously. For example, Upton Sinclair, the muckraking journalist, conducted a stealthy study of the conditions under which laborers worked in the meat packing industry in the USA at the turn of the twentieth century. Had he not done so, there would not have been the public furor that his findings created (interestingly presented not as a scholarly or journalistic piece, but as fiction in his 1906 novel *The Jungle*) that eventually led to the Pure Food and Drug Act and the Meat Inspection Act (Barkan, 1985).

On the other hand, many researchers who imbed themselves in organizations with the tacit approval of top management provide pointlessly hagiographic accounts of organizations, which are later shown to be corrupt (Rishi and Singh, 2011). Indeed, the issue of ethics is fraught, but it is extremely important for researchers to be cognizant of the ethical implications of their research. Management researchers have been insufficiently criticized for carrying the water for capitalists at the expense of labor, the environment and disadvantaged stakeholders. For example, the construct of corporate social responsibility has often been misused to advocate for lesser oversight of corporations by society, and this construct is unreflectively peddled by organizational theorists as some sort of overarching legitimizer for an organization’s relentless pursuit of value, at the expense of other marginalized social actors (Marens, 2010).

In short, qualitative research must submit itself to a higher standard of rigor and ethics in order to gain acceptance from its counterparts. This is especially true in a discursive terrain where quantitative and statistical approaches are given the imprimatur of authority, and have less to prove than qualitative techniques. However, interpretive qualitative researchers must simultaneously free themselves from the burden of having to subject their methodologies or their analytic approaches to modes of judgment derived principally from statistical analysis or positivist qualitative research. It is time to produce our own internal parameters of what constitutes good research, but at the same time, throw away the yokes of reliability, validity, sample size and a simplistic understanding of the falsifiable and the tautological.

**Personal context**

My desire to write this piece stems from three inter-related experiences. The first involves my own forays into qualitative research as a doctoral student, and subsequently as a professor–academic. The second is related to my experiences conducting a Professional Development Workshop (PDW) on Qualitative research at the Academy of Management for close to 20 years. The third and most recent triggering event concerns my experiences co-editing *The Routledge Companion to Qualitative Research in Organization Studies* (Mir and Jain, 2018).

During my doctoral research, I gravitated toward quantitative methods, principally because I had been trained as an engineer in my undergraduate work, and was inclined toward mathematics. I went beyond the business school to take the most rigorous courses in statistical analysis offered by the university, and reveled in the comforting certitude of an array of sophisticated methods. When a data set was available, I felt confident I could torture it statistically till it confessed the truth.

However, I was a critical researcher. My desire was to explore and underscore the manner in which power differentials ended up being enacted and deployed in organizational settings. When I went out in the field, I found very few data sets that allowed me to explore what I wanted. I became disillusioned with the manner in which researchers used available data to
represent constructs (e.g. ROE as a marker of “performance” and R&D expenditure as a proxy for an innovative mindset), methodological acts of bad faith like using interval scales as markers of ratio data, and the citing of certain scholars as a shorthand for “it is fine” (the most egregious and ongoing of these acts are the citing of Hambrick and Mason (1984) to condone using demographic variables as proxies of leadership attributes and the similar citing of Churchill (1979) to justify Likert scales. It became clear to me that if I had to seek a true understanding of power differentials within organizations, I would have to adopt a far more narrative approach.

This ongoing journey eventually led to success in the world of publishing, but the journey was not without its setbacks. I have had ethnographic research rejected because it did not fulfill the criteria of a “case study,” and I have had a prestigious journal return a manuscript without review because it “highlighted bad actions by corporations without balancing them with good actions.” Each one of us have such stories to tell, but here we are, alive and defiant, so I guess I avoided the most fatal of pitfalls.

My second set of experiences relates to the fact that for the past 18 years, I have been involved in helping conduct a PDW on qualitative research at the annual meetings of the Academy of Management. The PDW has been well attended by a lot of professors and new doctoral students. We have presented work by several experts in the field, including ethnographers and case study experts, Marxists and functionalists, people who work with traditional firms and those who use social media and visual technologies. The feedback from the participants suggested that new scholars were very interested in qualitative techniques, but had very little idea how to go about putting projects together. The general perception was that dissertations based solely on qualitative methodologies would not find favor with committees, and even if passed, would constitute the “kiss of death” in the job market for freshly minted PhDs. The best possible course for a dissertation was seen as a mixed-method approach, involving a quantitative component that augmented some qualitative work. Perhaps a few interviews could lead to a questionnaire, or an analysis of documents such as annual reports of companies could yield to constructs that could be studies through computational analysis of databases. This led to a distressing lack of understanding about how qualitative research gets conducted. Likewise, qualitative research was seen as too time-consuming and resource-intensive, and not suitable for people seeking swift completion of dissertations, or on the tenure clock. Ethnographies were especially considered avoidable. Finally, despite the odds, most participants felt that qualitative research was more interesting to read and more inspirational as a technique to follow. In this paper, I hope I am offering a counter argument that interpretive qualitative researchers need to shed this yoke rather than accept it and that those of us who have reached positions of prominence in academia help create institutional pathways whereby such research is furthered and nurtured.

The biggest challenge unfortunately was that participants were often concerned with issues that were more affiliated with quantitative techniques (such as reliability and validity), which tended to put them on the defensive when they attempted to explain their research to their peers and to anonymous reviewers of journals.

The final set of experiences relates to my encounter with several “experts” in qualitative research during the course of editing the Routledge Companion. The project was long, but rewarding, it involved interacting with around 50 scholars who had been identified as experts in diverse sub-genres of qualitative research, and were associated with several fields of organizational research. We had positivist strategists and interpretive feminists, ethnographers and case study specialists, critical and functionalist scholars, storytellers and people who worked with new technologies and social media. The process of getting to a completed project involved interacting with a diverse body of meticulous researchers, who had achieved success in getting their work published in top journals. It also, as may be expected, involved a great deal of introspection on what constituted capable qualitative research. This paper presents a distillation of some of those experiences.
Resisting institutional pulls

In the spirit of honesty, it is perhaps very important to acknowledge some of the shortcomings of bad qualitative research as well. From untheorized data to cherry-picked quotes, and from undeveloped theoretical frameworks to grossly generalized findings, there have been several submissions to journals and edited volumes that purport to do qualitative research, and only give it a bad name. In some cases, qualitative research ends up becoming the last refuge of the mathphobic doctoral student, who views it a place of refuge from the demands of statistical analysis rather than an interesting point from which they can conduct original research. Likewise, while journal editorial boards are often heavier on the quantitative side, the tendency of poor qualitative researchers to blame rejected pieces on “gatekeeping by the statistics mafia” should be greeted with a healthy dose of skepticism (though it does happen). In the end, the best we can hope for is that the burgeoning and emerging community of qualitative researchers in management academia will hopefully emerge into an organic structure of apprenticeship, which will ensure that interesting and persuasive qualitative research continues to get published and gain influence.

While I am loath to offer a manifesto for qualitative research going forward (recognizing its heterogeneity and the specificity of its multiple traditions), I would like to end with three important suggestions that affect all qualitative research.

The first is that those of us devoted to qualitative research must resist thinking, speaking and evaluating that research using quantitative thinking. We must act to educate journal editors, gatekeepers of conferences and blind reviewers of our own submissions that the standards by which qualitative research is deemed good or bad cannot be derived from criteria that are themselves beholden to large sample data analysis. This may involve some sacrifices, especially from those of us who have reached a level of seniority in the field. We must not accede to any and every demand made of us by peer reviewers, solely in the interest of getting published. The review process can be used to educate our peers, and to the extent that power differentials privilege them in this micro-interaction, we must be prepared to walk away occasionally.

Second, while ethical considerations are paramount in qualitative research, we need to debunk the narrow understanding of ethics as “following rules.” Ethics is not just about protection of the individual subject of our research, but represents a broader concern, imbued in traditions of resistance and emancipation. Ethics implies ensuring that our work is not deployed to protect the powerful at the expense of the oppressed, or to naturalize power relations as normal or normative. Sometimes, resistance is the most ethical option, both for us as researchers, and for the subjects we study.

Finally, and in the same spirit, we need to be aware of the institutional pulls that our research will be subject to, and also be ready to resist them. It can be argued that in a world characterized by the dominance of neoliberal economic policies, officialized organizational (including qualitative) research has developed an “institutional” character. An institution may be defined broadly as a social pattern that owes its survival to it being constantly practiced, and accepted as important and useful. While it initially emerges out of need, and out of the prodding of those who exercise power, an institution eventually acquires a legitimacy of its own, emerging as a social “truth.” In fact, once a practice or a set of practices is ordained as an institution, it acquires the status of a self-fulfilling prophesy, generating its own logic as it proceeds. Anyone who opposes the internal logic of an institution risks illegitimacy among the community of practitioners that become a part of the institution. Over time, the success of certain forms of qualitative research (at the expense of others) can be attributed in part to this
institutional character. Some of the artifacts of the institutionalization of mainstream qualitative research include:

- A system of hierarchy of research outlets, where researchers are only rewarded for publishing in certain kinds of journals, and other forms of research are cast onto the periphery.
- Professional societies (e.g. AOM) that facilitate the creation of a network of actors, where regimes of research can be enforced. This, in turn, privileges research conducted from certain geographical spaces and institutional affiliations.
- The emergence of sets of formal and informal rules regarding researcher behavior, ownership of ideas and citation criteria.
- A prescribed agenda for sharing research ideas characterized by the belief that “underperforming” organizations would benefit by emulating the “successful” organizations in their midst, thus joining the list of “winners” in the era of globalization.
- The isomorphic pulls within specific sub segments (e.g. strategy) toward the use of similar variables, what constitutes an appropriate research question, and what analytic techniques are de rigeur.
- The injunction that institutions remain “apolitical,” and the subsequent casting of even fundamental ethical issues as “political” and, therefore, beyond the pale of analysis or comment.

As qualitative researchers or as researchers in general, we should not feel obligated to submit willy-nilly to these institutional pulls. Indeed, the coercive powers of such institutional norms are often exaggerated, as are the rewards of mimetic compromise. Good research will win out. It may initially seem as if we are tilting at windmills, but over time, the research that stands out is that which begins from a place of authenticity, and adheres to principles that the purveyors of research value above careerist expediency and paradigmatic compromise. Good research resists the siren call of institutionalization. It challenges the “common sense” assumptions of the field and brings them into the realm of the questionable. It seeks to theorize the untheorizable and anthropologize the dominant. To use the language of organizations, good, transparent and effective research must necessarily go beyond the institutional pulls of the dominant paradigms of the field.

References


**Corresponding author**

Raza Mir can be contacted at: MirR@wpunj.edu

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