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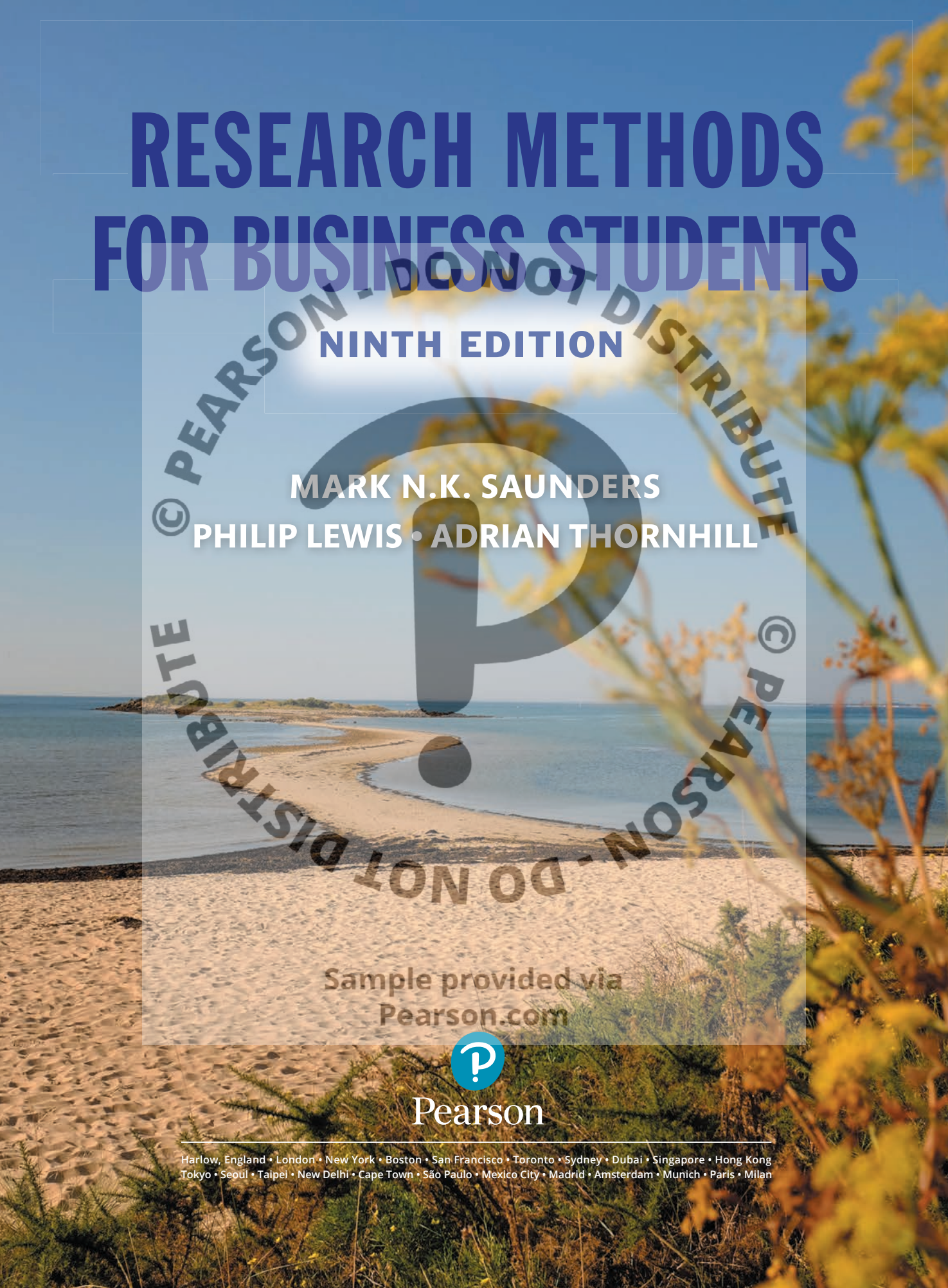

RESEARCH METHODS FOR BUSINESS STUDENTS

NINTH EDITION

MARK N.K. SAUNDERS
PHILIP LEWIS • ADRIAN THORNHILL

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How to use this book

This book is written with a progressive logic, which means that terms and concepts are defined when they are first introduced. One implication of this is that it is sensible for you to start at the beginning and to work your way through the text, various boxes, self-check questions, review and discussion questions, case studies and case study questions. You can do this in a variety of ways depending on your reasons for using this book. However, this approach may not be suitable for your purposes, and you may wish to read the chapters in a different order or just dip into particular sections of the book. If this is true for you then you will probably need to use the glossary to check that you understand some of the terms and concepts used in the chapters you read. Suggestions for three of the more common ways in which you might wish to use this book follow.

As part of a research methods course or for self-study for your research project

If you are using this book as part of a research methods course the order in which you read the chapters is likely to be prescribed by your tutors and dependent upon their perceptions of your needs. Conversely, if you are pursuing a course of self-study for your research project, dissertation or consultancy report, the order in which you read the chapters is your own choice. However, whichever of these you are, we would argue that the order in which you read the chapters is dependent upon your recent academic experience.

For many students, such as those taking an undergraduate degree in business or management, the research methods course and associated project, dissertation or consultancy report comes in either the second or the final year of study. In such situations it is probable that you will follow the chapter order quite closely (see Figure P.1). Groups of chapters within which we believe you can switch the order without affecting the logic of the flow too much are shown on the same level in this diagram and are:

- those associated with obtaining or collecting data (Chapters 8, 9, 10 and 11);
- those associated with data analysis (Chapters 12 and 13).

Within the book we emphasise the importance of beginning to write early on in the research process as a way of clarifying your thoughts. In Chapter 1 we encourage you to keep a reflective diary, notebook or journal throughout the research process so it is helpful to read this chapter early on. We recommend you also read the sections in Chapter 14 on writing prior to starting to draft your critical review of the literature (Chapter 3).

Alternatively, you may be returning to academic study after a gap of some years, to take a full-time or part-time course such as a Master of Business Administration, a Master of Arts or a Master of Science with a Business and Management focus. Many students in such situations need to refresh their study skills early in their programme, particularly

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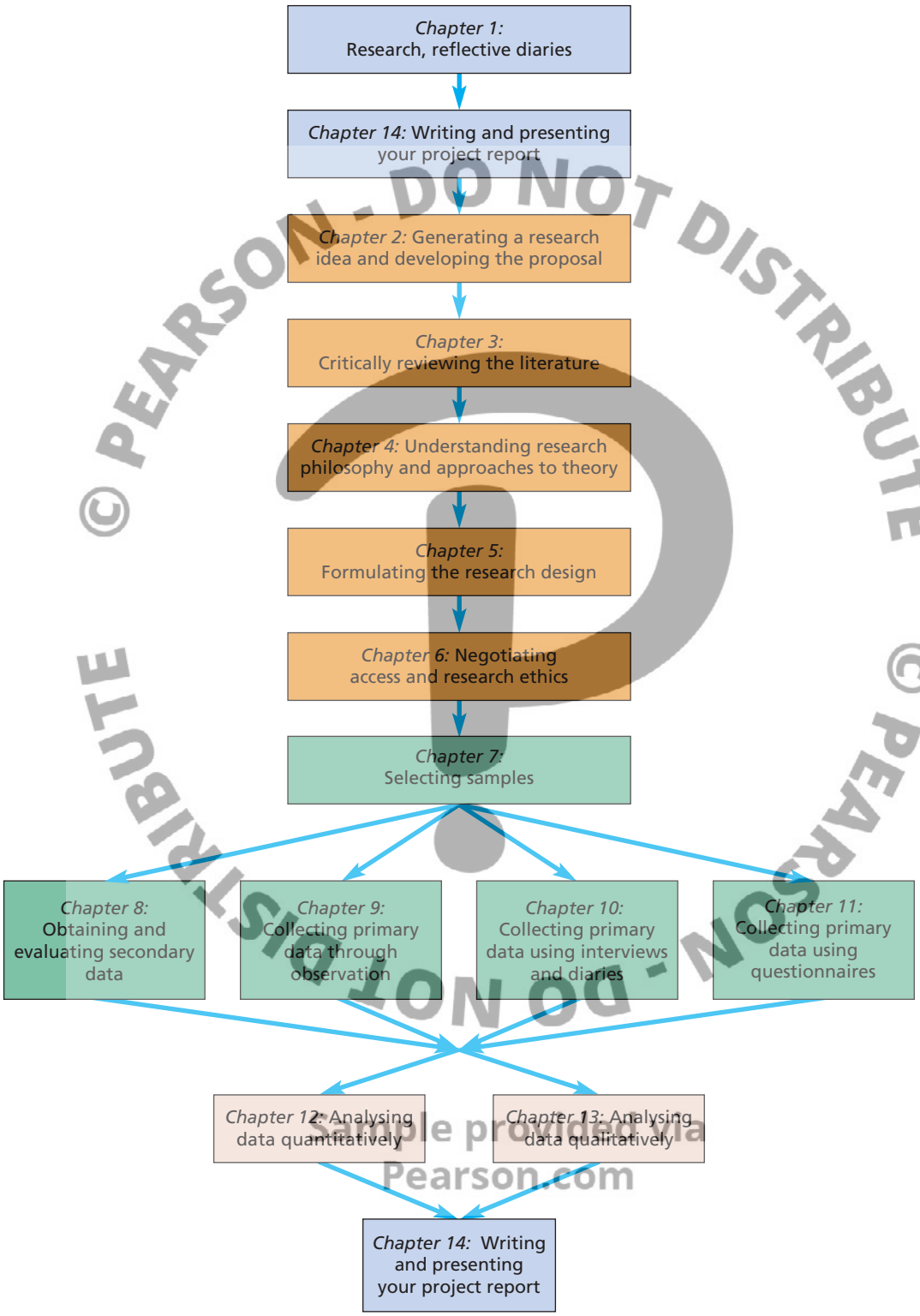

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Figure P.1 Using this book for your research methods course and associated project

those associated with critical reading of academic literature and academic writing. If you feel the need to do this, you may wish to start with those chapters that support you in developing and refining these skills (Chapters 3 and 14), followed by Chapter 8, which introduces you to the range of secondary data sources available that might be of use for other assignments (Figure P.2). Once again, groups of chapters within which we believe

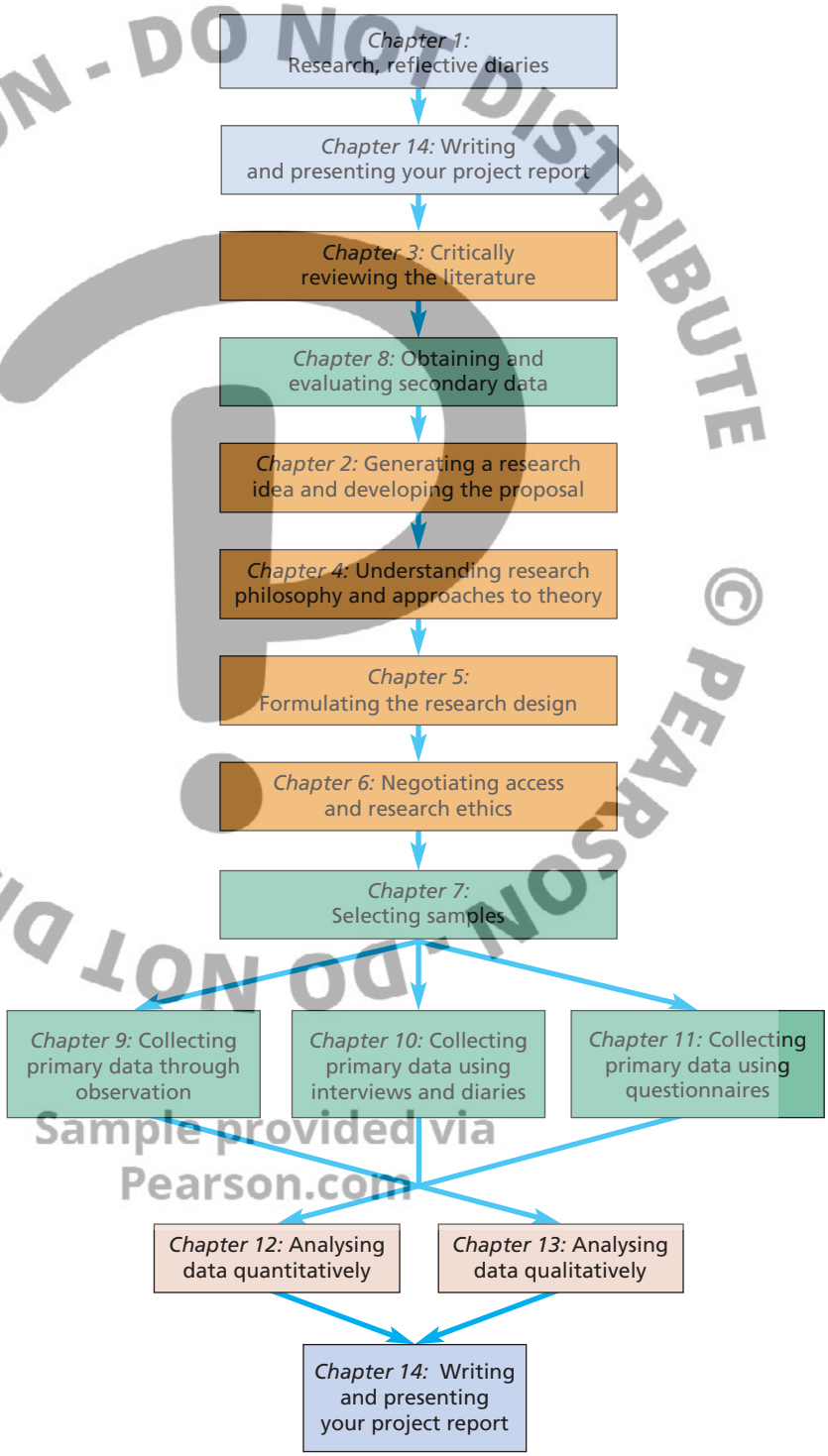

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Figure P.2 Using this book as a returner to academic study

you can switch the order without affecting the logic of the flow too much are shown on the same level in the diagram and are:

- those chapters associated with primary data collection (Chapters 9, 10 and 11);
- those associated with data analysis (Chapters 12 and 13).

In addition, we would recommend that you re-read Chapter 14 prior to starting to write your project report, dissertation or consultancy report, or if you need to undertake a presentation.

In whichever order you choose to read the chapters, we would recommend that you attempt all the self-check questions, review and discussion questions and those questions associated with the case studies. Your answers to the self-check questions can be self-assessed using the answers at the end of each chapter. However, we hope that you will actually attempt each question prior to reading the answer! If you need further information on an idea or a technique, then first look at the references in the further reading section.

At the end of each chapter, the section headed 'Progressing your research project' lists a number of tasks. Such tasks might involve you in just planning a research project or, alternatively, designing and distributing a questionnaire of your own. They all include making an entry in your reflective diary or notebook. When completed, these tasks will provide a useful aide-mémoire for assessed work (including a reflective essay or learning log) and can be used as the basis for the first draft of your project report. It is worth pointing out here that many consultancy reports for organisations do not require you to include a review of the academic literature.

As a guide through the research process

If you are intending to use this book to guide you through the research process for a research project you are undertaking, such as your dissertation, we recommend that you read the entire book quickly before starting your research. In that way you will have a good overview of the entire process, including a range of techniques available, and will be better able to plan your work.

After you have read the book once, we suggest that you re-read Section 1.5 on keeping a reflective diary or notebook and Sections 14.2–14.10 on writing first. Then work your way through the book again following the chapter order. This time you should attempt the self-check questions, review and discussion questions and those questions associated with each case study to ensure that you have understood the material contained in each chapter prior to applying it to your own research project. Your responses to self-check questions can be assessed using the answers at the end of each chapter.

If you are still unsure as to whether particular techniques, procedures or ideas are relevant, then pay special attention to the 'Focus on student research', 'Focus on management research' and 'Focus on research in the news' boxes. 'Focus on student research' boxes are based on actual students' experiences and illustrate how an issue has been addressed or a technique or procedure used in a student's research project. 'Focus on management research' boxes discuss recent research articles in established refereed academic journals, allowing you to see how research is undertaken successfully. These articles are easily accessible via the main online business and management databases. 'Focus on research in the news' boxes provide topical news stories of how particular research techniques, procedures and ideas are used in the business world. You can also look in the 'Further reading' for other examples of research where these have been used. If you need further

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information on an idea, technique or procedure then, again, start with the references in the further reading section.

Material in some of the chapters is likely to prove less relevant to some research topics than others. However, you should beware of choosing techniques because you are happy with them, if they are inappropriate. Completion of the tasks in the section headed 'Progressing your research project' at the end of Chapters 2–13 will enable you to generate all the material that you will need to include in your research project, dissertation or consultancy report. This will also help you to focus on the techniques and ideas that are most appropriate to your research. When you have completed these tasks for Chapter 14 you will have written your research project, dissertation or consultancy report and also prepared a presentation using slides or a poster.

As a reference source

It may be that you wish to use this book now or subsequently as a reference source. If this is the case, an extensive index will point you to the appropriate page or pages. Often you will find a 'checklist' box within these pages. 'Checklist' boxes are designed to provide you with further guidance on the particular topic. You will also find the contents pages and the glossary useful reference sources, the latter defining over 750 research terms. In addition, we have tried to help you to use the book in this way by including cross-references between sections in chapters as appropriate. Do follow these up as necessary. If you need further information on an idea or a technique then begin by consulting the references in the further reading section. Wherever possible we have tried to reference books that are in print and readily available in university libraries and journal articles that are in the major business and management online databases.

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Preface

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In writing the ninth edition of *Research Methods for Business Students* we have, alongside the many comments we have received regarding previous editions, considered the implications of the Covid-19 pandemic for undertaking research. The pandemic invariably caused us to adapt the way we do research posing new challenges for gaining access and recruiting people to take part, and in the collecting of data (Nind et al., 2021). Alongside an already growing use of online questionnaires, there was a shift from face-to-face to online and telephone interviews. The former of these made considerable use of cloud based video-conferencing and the latter computer assisted telephone interviewing. Ethnographic, diary and other expressive methods were also used more widely.

In response to these challenges and over developments we have fully revised the book, expanding our consideration of online, ethnographic, diary and other expressive methods and the analysis of the resulting data. In particular: Chapter 1 now includes a discussion of responsible business research; Chapter 2 contains considerably more detail on developing research questions including using the AbC (Abstract, Context) rule; Chapter 4 now considers the interrelationships between paradigms and philosophies in more depth; Chapter 5 now considers engaged scholarship; Chapter 6 now considers Internet mediated access and associated issues of ethics in more detail; Chapter 7 discusses using purchased database lists and volunteer panels alongside more detailed discussions of sample size; Chapter 9 contains enlarged sections on using researcher and informant created videos, static images and audio recordings in observation; Chapter 10 has a new section on evaluating interview practice looking at conversational space mapping and language cleanliness; Chapter 11 now provides an overview of scale development; Chapter 13 includes more detail on transcription and thematic coding, including using the Gioia method; Chapter 14 includes more detailed advice regarding using quotations from transcripts, diaries and other documentary data, as well as on poster design; and we have developed further the Glossary, which now includes over 750 research-related terms. New case studies at the end of each chapter have been developed with colleagues, providing up-to-date scenarios through which to illustrate issues associated with undertaking research. Alongside this we have also taken the opportunity to update many examples and revise the tables of Internet addresses.

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As in previous editions, we have taken a predominantly non-software-specific approach in our discussion of methods. By doing this, we have been able to focus on the general principles needed to utilise a range of analysis software and the Internet effectively for research. However, recognising that many students have access to sophisticated data collection and analysis software and may need help in developing these skills, we continue to provide access to up-to-date 'teach yourself' guides to Qualtrics™, IBM SPSS Statistics™, Excel™ and Internet searching via the book's website (www.pearsoned.co.uk/saunders). Where appropriate, these guides are provided with data sets. In the preparation of the ninth edition we were fortunate to receive considerable feedback from colleagues and students

in universities throughout the world. We are extremely grateful to all the reviewers who gave their time and shared their ideas.

Inevitably, the body of knowledge of research methods has developed further since 2019, and we have revised all chapters accordingly. Our experiences of teaching and supervising students and working through the methods in classes have suggested alternative approaches and the need to provide alternative material. Consequently, we have taken the opportunity to update and refine existing worked examples, remove those that were becoming dated, and develop new ones where appropriate. However, the basic structure remains much the same as the previous eight editions.

Other minor changes and updating have been made throughout. Needless to say, any errors of omission and commission continue to remain our responsibility.

As with previous editions, much of our updating has been guided by comments from students and colleagues, to whom we are most grateful. We should like particularly to thank students from University of Birmingham, and various Doctoral Symposiums for their comments on all of the chapters. Colleagues in both our own and other universities have continued to provide helpful comments, advice and ideas. We are particularly grateful to Heather Cairns-Lee, Zeineb Djebali, Colin Hughes, Emrah Karakaya, Juliet Kele, Amanda Lee, Ben Saunders, and Nicholas Wheeler for their insightful comments and help with early drafts of chapters. Colleagues and friends again deserve thanks for their assistance in providing examples of research across the spectrum of business and management, co-authoring chapters, writing case studies and in reviewing parts of this book: Neve Abgeller, Mina Beigi, Alexandra Bristow, Clare Burns, Catherine Cassell, Fariba Darabi, Viktor Dörfler, Adina Dudau, Sarah Forbes, Mat Hughes, Joséphine Lapointe, Natasha Mauthner, Megane Miralles, Emily Morrison, Trevor Morrow, Shahrzad Nayyeri, Jonathan Scott, Maura Sheehan, Melika Shirmohamma, Marc Stierand and Catherine Wang.

We would also like to thank all of the staff at Pearson (both past and present) who supported us through the process of writing the ninth edition. Our thanks go, in particular, to Vicky Tubb, our commissioning editor, and Kay Richardson our online content developer for their continuing support and enthusiasm throughout the process. We would also like to express our thanks to Andrew Muller as content producer and as copy-editor.

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March 2022

Reference

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Chapter 4

Understanding research philosophy and approaches to theory development

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Learning outcomes

By the end of this chapter you should be able to:

- explain the relevance of ontology, epistemology and axiology to business research;
- describe the main research paradigms that are significant for business research;
- explain the relevance for business research of philosophical positions such as positivism, critical realism, interpretivism, postmodernism and pragmatism;
- reflect on your own epistemological, ontological and axiological stance;
- reflect on and articulate your own philosophical position and approach to theory development in relation to your research;
- distinguish between deductive, inductive, abductive and retroductive approaches to theory development.

4.1 Introduction

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Much of this book is concerned with the way in which you collect data to answer your research question(s) and meet your aim and objectives. Many people plan their research in relation to a question that needs to be answered or a problem that needs to be solved. They then think about what data they need and the procedures they use to collect them. You are not therefore unusual if early on in your research you consider whether you should, for example, use an online questionnaire or undertake telephone interviews. However, procedures to collect your data belong in the centre of the research 'onion', the diagram we use to depict a range of factors underlying the choices about data access, ethics, sample selection, collection and analysis in Figure 4.1. (You may find that there is much terminology that is new to you in this diagram – do not worry

about it for now, we will take you through it all as you progress through the book.) In coming to this central core, you need to outline your philosophy, justifying your methodological choice, your research strategy so that others can see that your research should be taken seriously (Crotty 1998). But beware, although there are clear links between your philosophy, approach to theory development and, for example, data collection procedures, these are not deterministic. Consequently, just drawing a straight line from a particular philosophy to the centre of the research onion may not reveal the most appropriate approach to theory development, methodological choice or strategy. Rather you need to understand and explain which specific aspects of the outer layers of the onion are important to your research, rather than just peel and throw away!

This chapter is concerned principally with the outer two of the onion's layers: philosophy (Sections 4.2, 4.3 and 4.4) and approach to theory development (Section 4.5). In Chapter 5 we examine the layers we call methodological choice, strategy and time horizon. The sixth layer (procedures and techniques) is dealt with in Chapters 6–13. Section 4.2 introduces you to the philosophical underpinnings of business and management, considering different forms of assumptions. We then consider different research paradigms, these are the underlying basic and taken-for-granted assumptions of business research (Section 4.3), before looking in more detail at five research philosophies commonly adopted by its researchers (Section 4.4). In the final section (4.5) we consider three approaches to theory development.

At the end of the chapter in the section 'Progressing your research project', you will find a reflexive tool (HARP) designed by Bristow and Saunders. This will help you to make your values and assumptions more explicit, explain them using the language of research philosophy, and consider the potential fit between your own beliefs and those of major philosophies used in business and management research. We encourage you to reflect on your own beliefs and assumptions in relation to these five philosophies and the research design you will develop to undertake your research. This is important as it will help you determine those questions that you consider meaningful and the data collection procedures and analysis techniques well suited to answering them.

Decolonisation: beliefs, assumptions and life-oppressing decisions

Our own beliefs and assumptions about how the world operates affect both the data we gather and how we interpret that data. For countries that have been colonised, this is evident in the dominance of settlers' views over those of the indigenous peoples and the need for remedy through decolonisation. Modern Australia, for example, was founded on western, colonial systems that did not include Indigenous First Nation Australians' knowledges, cultures, rights practices and laws, inflicting life-changing trauma on these peoples.

In his book *Dark Emu* Bruce Pascoe (2018) offers a compelling insight of pre-colonial Aboriginal society. Using data from records of and writings by early explorers and colonists, he reveals Indigenous Australians had, over thousands of years, developed sophisticated systems of food production and land management, cultivating and irrigating crops and living in villages. This he contrasts with the colonialist's labelling of them as hunter-gathers.

Pascoe argues that early colonialists selectively filtered data interpreting it to fit their prejudices. These Europeans believed in their own superiority in science, economy and religion; considering it was

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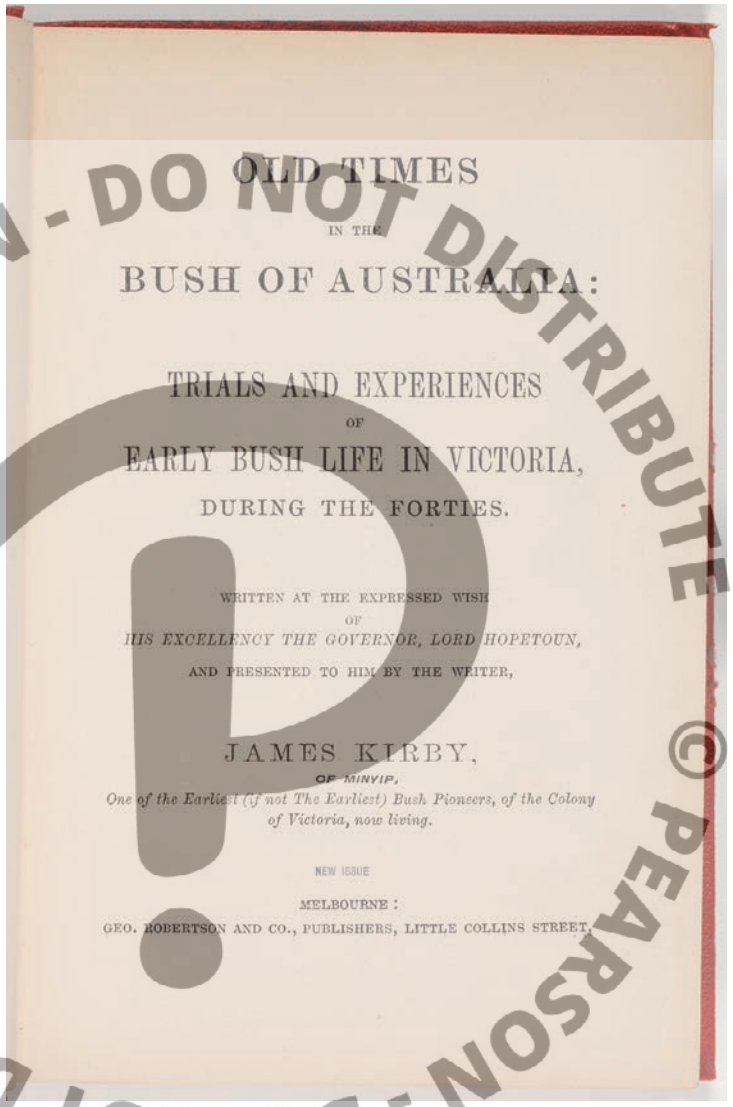
their duty to spread their version of civilisation including the word of (their) God to heathens in return for the wealth of the colonised lands. Pascoe argues that these taken-for-granted assumptions allowed Europeans to justify taking possession of the land as, by denying the existence of an economy, they were denying the right of the original peoples to their land.

He supports his argument reinterpreting a variety of data including records, diaries and published narratives by the first European colonialists. In one of these, colonialist James Kirby observes a series of weirs built in what is now known as the Murray River system. These he describes in considerable detail revealing how these weirs were used to direct and support catching of fish. Yet, Kirby (1897) subsequently interpreted what he had seen as indolence and laziness.This and interpretations based on similar assumptions drawn from European culture and civilisation have, until recently, been privileged in accounts of Australian history, ignoring or undervaluing considerably the voices of the Aboriginal and Torres Strait Islander First Nations peoples and their own cultures, the oldest living cultures on earth. Decolonialisation looks to reverse and rectify this privileging of certain interpretations.

Just as colonialists' beliefs and assumptions affected how they interpreted what they saw in Australia and other colonised lands, our own belief systems and associated taken-for-granted assumptions can impact on our interpretations in the research we pursue. We need to recognise and be aware of these and the impact they have on how we shape and understand our research questions, the methods we use and the interpretations we make of our findings.



OLD TIMES
IN THE
BUSH OF AUSTRALIA:

TRIALS AND EXPERIENCES
OF
EARLY BUSH LIFE IN VICTORIA,
DURING THE FORTIES.

WRITTEN AT THE EXPRESSED WISH
OF
HIS EXCELLENCY THE GOVERNOR, LORD HOPETOUN,
AND PRESENTED TO HIM BY THE WRITER,

JAMES KIRBY,
OF MINYIP,
One of the Earliest (if not The Earliest) Bush Pioneers, of the Colony of Victoria, now living.

NEW ISSUE

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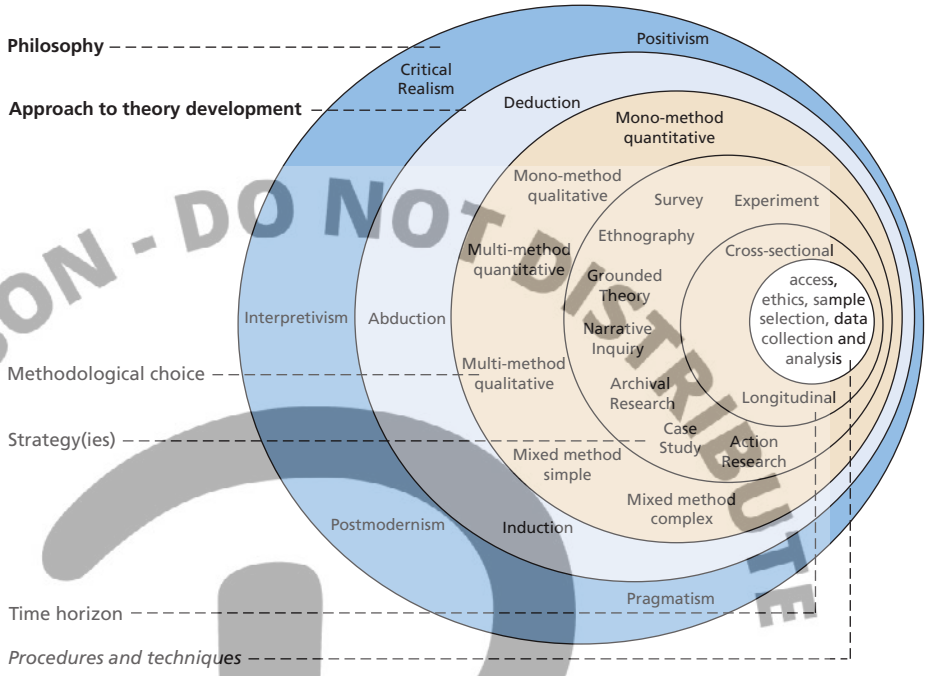

Figure 4.1 The 'research onion'
Source: © 2022 Mark NK Saunders; developed from Saunders et al. 2019

4.2 The philosophical underpinnings of business and management

What is research philosophy and why is it important?

The term **research philosophy** refers to a system of beliefs and assumptions about the development of knowledge. Although this sounds rather profound, it is precisely what you are doing when embarking on research: developing knowledge in a particular field. The knowledge development you are embarking upon may not be as dramatic as a new theory of human motivation, but even addressing a specific problem in a particular organisation you are, nonetheless, developing new knowledge. Your research philosophy sets out the world view within which your research is conducted. As shown in the opening vignette, the assumptions of the world view within which research is undertaken are important, impacting which data are privileged and how they are interpreted.

Whether or not you are consciously aware of them, at every stage in your research you will make a number of types of assumptions (Burrell and Morgan 2016). These include (but are not limited to) assumptions about the realities you encounter in your research (ontological assumptions), about human knowledge (epistemological assumptions), and about the extent and ways your own values influence your research process (axiological assumptions). These assumptions inevitably shape how you understand your research questions, the methods you use and how you interpret your findings (Crotty 1998). A well-thought-out and consistent set of assumptions will constitute a credible research

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philosophy and will shape your choice of research question. It will underpin your methodological choice, research strategy and data collection procedures and analysis techniques and how you report your findings, discussion and conclusion. This will allow you to design a coherent research project, in which all elements of research fit together. Johnson and Clark (2006) note that, as business and management researchers, we need to be aware of the philosophical commitments we make through our choice of research strategy, since this will have a significant impact on what we do and how we understand what it is we are investigating. Crucially, you need to ensure your epistemological and ontological assumptions are consistent with your research design and methods used. Without this, it is unlikely you will generate trustworthy and useful research findings.

You may or may not have already thought about your own beliefs about the nature of the world around you, what constitutes acceptable and desirable knowledge, or the extent to which you believe it necessary to remain detached from your research data. The process of exploring and understanding your own research philosophy requires you to hone the skill of reflexivity (Section 1.5), that is to question your own thinking and actions, and learn to examine your own beliefs with the same scrutiny as you would apply to the beliefs of others (Corlett and Mavin 2018). This may sound daunting, but we all do this in our day-to-day lives when we learn from our mistakes. As a researcher, you need to develop reflexivity, to become aware of and actively shape the relationship between your own beliefs and assumptions (your philosophical position) and how you design and undertake your research (Alvesson and Sköldberg 2018).

You may be wondering about the best way to start this reflexive process. In part, your exploration of your philosophical position and how to translate it into a coherent research practice will be influenced by practical considerations, such as your own and your project tutor's subject area, the time and finances available for your research project, and what access you can negotiate to data. There are two things that you can do to start making a more active and informed philosophical choice:

- begin asking yourself questions about your research beliefs and assumptions (the reflexive tool at the end of the chapter – HARP – will help here);
- familiarise yourself with major research philosophies within business and management by reading the rest of this chapter (and any further philosophical reading you wish to explore);

This dual course of action will help set in motion the development of your research philosophy, which you can then express through your research design (Figure 4.2).

And now, a word of warning. Although every research project is underpinned by particular philosophical assumptions, these are often unreported in journal articles, the reader being left to interpret them from the methods used. In contrast, like O'Gorman and MacIntosh (2015) we consider it important that you make your philosophical commitment explicit, outlining the implications of the associated assumptions for your chosen methods. Through doing this you can signal clearly to your readers the bases from which your research was undertaken, your claims made, and within which it should be judged.

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Is there a best philosophy for business and management research?

You may be wondering at this stage whether you could take a shortcut, and simply adopt 'the best' philosophy for business and management research. One problem with such a shortcut would be the possibility of discovering a clash between 'the best' philosophy and your own beliefs and assumptions. Another problem would be that

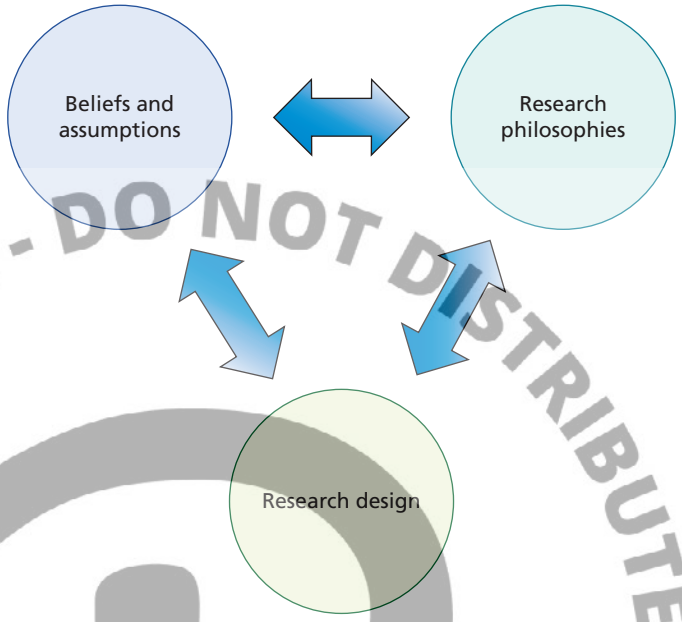

Figure 4.2 Developing your research philosophy as a reflexive process

Source: ©2021 Alexandra Bristow and Mark N.K. Saunders

business and management researchers do not agree about one best philosophy (Tsoukas and Knudsen 2003).

In terms of developing your own philosophy and designing your research project, it is important to recognise that philosophical disagreements are an intrinsic part of business and management research. When business and management emerged as an academic discipline in the twentieth century, it drew its theoretical base from a mixture of disciplines in the social sciences (e.g. sociology, psychology, economics), natural sciences (e.g. chemistry, biology), applied sciences (e.g. engineering, statistics), humanities (e.g. literary theory, linguistics, history, philosophy) and the domain of organisational practice (Starbuck 2003). In drawing on these disciplines, it absorbed the various associated philosophies, dividing and defining them, and resulting in the coexistence of multiple research philosophies and methodologies we see today.

Business and management scholars have spent long decades debating whether this multiplicity of research philosophies, paradigms and methodologies is desirable, and have reached no agreement. Instead, two opposing perspectives have emerged: pluralism and unificationism. Unificationists see business and management as fragmented and argue that this fragmentation prevents the field from becoming more like a true scientific discipline. They advocate unification of management research under one strong research philosophy, paradigm and methodology (Pfeffer 1993). Pluralists see the diversity of the field as helpful, arguing that it enriches business and management (Knudsen 2003).

In this chapter, we take a pluralist approach and suggest that each research philosophy and paradigm contribute something unique and valuable to business and management research, representing a different and distinctive 'way of seeing' organisational realities (Morgan 2006). However, we believe that you need to be aware of the depth of difference and disagreements between these distinct philosophies. This will help you to both outline and justify your own philosophical choices in relation to your chosen research method.

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Ontological, epistemological and axiological assumptions

Before we discuss individual research philosophies in Section 4.4, we need to be able to distinguish between them. We do this by considering the differences in the assumptions typically made by scholars working within each philosophy. To keep things relatively simple, we look at three types of research assumptions to distinguish research philosophies: ontological, epistemological and axiological. There are, of course, other types of assumptions that are relevant to research design and research philosophies – when you use the HARP tool at the end of this chapter, you will spot some of them. For example, researchers differ in terms of how free they believe individuals are to change their lives and the world around them, and conversely how constraining the societal structures are on the lives and actions of individuals. These are known as structure and agency assumptions.

Ontology refers to assumptions about the nature of reality. In this chapter's opening vignette, we saw how colonialists made specific assumptions regarding the realities of First Nation Australians, perceiving them as hunter-gatherers and lazy. Although this may seem far removed from your intended research project, your ontological assumptions shape the way in which you see and study your research objects. In business and management these objects include organisations, management, individuals' working lives and organisational events and artefacts. Your ontology therefore determines how you see the world of business and management and, therefore, your choice of what to research for your research project.

Imagine you wanted to research resistance to organisational change. For a long time, business and management scholars made the ontological assumption that resistance to change was highly damaging to organisations. They argued it was a kind of organisational misbehaviour and happened when change programmes went wrong. Consequently, they focused their research on how this phenomenon could be eliminated, looking for types of employee that were most likely to resist change and management actions that could prevent or stop resistance. More recently, some researchers have started to view this concept differently, resulting in a new strand of research. These researchers see resistance as a phenomenon that happens all the time whenever organisational change takes place, and that benefits organisations by addressing problematic aspects of change programmes. Their different ontological assumptions mean they focus on how resistance to change can best be harnessed to benefit organisations, rather than looking for ways to eliminate resistance (Thomas and Hardy 2011).

Epistemology refers to assumptions about knowledge, what constitutes acceptable, valid and legitimate knowledge, and how we can communicate knowledge to others (Burrell and Morgan 2016). Whereas ontology may initially seem rather abstract, the relevance of epistemology is more obvious. The multidisciplinary context of business and management means that different types of knowledge – ranging from numerical data to textual and visual data, and from facts to (as we see in the opening vignette) narratives and stories – can all be considered legitimate. Consequently, different business and management researchers adopt different epistemologies in their research, including projects based on archival research and autobiographical accounts (Martí and Fernández 2013), narratives (Gabriel et al. 2013) and films (Griffin et al. 2017).

This variety of epistemologies gives you a large choice of methods. However, it is important to understand the implications of different epistemological assumptions in relation to your choice of method(s) and the strengths and limitations of subsequent research findings. For example, the (positivist) assumption that objective facts offer the

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best scientific evidence is likely, but not certain, to result in the choice of quantitative research methods. Within this, the subsequent research findings are likely to be considered objective and generalisable. However, they will also be less likely to offer a rich and complex view of organisational realities, account for the differences in individual contexts and experiences or, perhaps, propose a radically new understanding of the world than if you based your research on a different view of knowledge. In other words, despite this diversity, it is your own epistemological assumptions (and arguably those of your project tutor) that will govern what you consider legitimate for your research.

Axiology refers to the role of values and ethics in the research process. We see this in the opening vignette where European colonialists felt it their duty to spread their version of civilisation, including the word of their God, to heathens. One of the key axiological choices that you will face as a researcher is the extent to which you wish to view the impact of your own values and beliefs on your research as a positive thing. Consequently, you will need to decide how you deal with both your own values and those of the people you are researching. For example, you may believe, as Heron (1996) argues, that our values are the guiding reason for all human action, and that while it is inevitable that you will incorporate your values during the process, it is crucially important that you explicitly recognise and reflect on these as you conduct and write up your research. Choosing one topic rather than another suggests you think one of the topics is more important. Your research philosophy is a reflection of your values, as is your choice of data collection procedures. For example, conducting a study where you place greatest importance on data collected using video internet mediated or face to face interviews (Chapter 10) suggests you value data collected through personal interaction with your participants more highly than views expressed through responses to an anonymous questionnaire (Chapter 11). Whatever your view, it is important, as Heron (1996) argues, to demonstrate your axiological skill by being able to articulate your values as a basis for making judgements about what research you are conducting and how you go about doing it.

Some of our students have found it helpful to write their own statement of personal values in relation to the topic they are studying. For example, for the topic of career development, your personal values may dictate that you believe developing their career is an individual's responsibility. In finance, a researcher may believe (hold the value) that as much information as possible should be available to as many stakeholders as possible. Writing a statement of personal values can help heighten your awareness of value judgements you are making in drawing conclusions from your data. Being clear about your own value position can also help you in deciding what is appropriate ethically and explaining this in the event of queries about decisions you have made (Sections 6.5–6.7).

Philosophical assumptions as multi-dimensional continua

Now you are familiar with some types of assumptions that research philosophies make, you need to be able to distinguish between them. Earlier in this chapter we discussed the emergence of business and management as a discipline and how it absorbed a range of philosophies from natural sciences, social sciences and arts and humanities. Although this offers philosophical and methodological choice, it also means business and management research philosophies are scattered along a multidimensional set of continua (Niglas 2010) between two opposing extremes. Table 4.1 summarises the continua and their objectivist and subjectivist extremes in relation to the types of philosophical assumptions that we have just discussed.

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Objectivism

Objectivism incorporates the assumptions of the natural sciences, arguing that the social reality we research is external to us and others (referred to as **social actors**) (Table 4.1). This means that, ontologically, objectivism embraces **realism**, which, in its most extreme form, considers social entities to be like physical entities of the natural world, in so far as they exist independently of how we think of them, label them, or even of our awareness of them. Because the interpretations and experiences of social actors do not influence the existence of the social world according to this view, an objectivist in the most extreme form believes that there is only one true social reality experienced by all social actors. This social world is made up of solid, granular and relatively unchanging 'things', including major social structures such as family, religion and the economy into which individuals are born (Burrell and Morgan 2016).

Table 4.1 Philosophical assumptions and the objectivism – subjectivism dimension

Assumption type	Questions	Continua with two sets of extremes		
		Objectivism	⇔	**Subjectivism**
Ontology	• What is the nature of reality?	Real	⇔	Nominal/decided by convention
	• What is the world like?	External	⇔	Socially constructed
		One true reality (universalism)	⇔	Multiple realities (relativism)
		Granular (things)	⇔	Flowing (processes)
		Order	⇔	Chaos
Epistemology	• How can we know what we know?	Adopt assumptions of the natural scientist	⇔	Adopt the assumptions of the arts and humanities
	• What is considered acceptable knowledge?	Facts	⇔	Opinions
	• What constitutes good-quality data?	Numbers	⇔	Written, spoken and visual accounts
		Observable phenomena	⇔	Attributed meanings
	• What kinds of contribution to knowledge can be made?	Law-like generalisations	⇔	Individuals and contexts, specifics
Axiology	• What is the role of values in research?	Value-free	⇔	Value-bound
	• Should we try to be morally-neutral when we do research, or should we let our values shape research? How should we deal with the values of research participants?	Detachment	⇔	Integral and reflexive

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From an objectivist viewpoint, social and physical phenomena exist independently of individuals' views of them and tend to be universal and enduring in character.

Consequently, it makes sense to study them in the same way as a natural scientist would study nature. Epistemologically, objectivists seek to discover 'the truth' about the social world, through the medium of observable, measurable facts, from which law-like generalisations can be drawn about the universal social reality. Axiologically, since the social entities and social actors exist independently of each other, objectivists strive to keep their research free of values, which they believe could bias their findings. They therefore also try to remain detached from their own values and beliefs throughout a rigorous scientific research process.

You may argue that management is an objective entity and decide to adopt an objectivist stance to the study of particular aspects of management in a specific organisation (see John in Box 4.1). In order to justify this, you would say that the managers in your organisation have job descriptions which prescribe their duties, there are operating procedures to which they are supposed to adhere, they are part of a formal structure which locates them in a hierarchy with people reporting to them and they in turn report to more senior managers. This view emphasises the structural aspects of management and assumes that management is similar in all organisations. Aspects of the structure in which management operates may differ, but the essence of the function is very much the same in all organisations. More generally if you took this ontological stance, the aim of your research would be to discover the laws that govern management behaviour to predict how management would act in the future. You would also attempt to lay aside any beliefs you may have developed from interacting with individual managers in the past, in order to avoid these experiences colouring your conclusions about management in general.

Alternatively, you may prefer to consider the objective aspects of management as less important than the way in which managers attach their own individual meanings to their jobs and the way they think that those jobs should be performed. This approach would be much more subjectivist (see Emma in Box 4.1).

Subjectivism

Subjectivism incorporates assumptions of the arts and humanities (Table 4.1), asserting that social reality is made from the perceptions and consequent actions of social actors (people). Ontologically, subjectivism embraces nominalism (also sometimes called conventionalism). **Nominalism**, in its most extreme form, considers that the order and structures of social phenomena we study (and the phenomena themselves) are created by us as researchers and by other social actors through use of language, conceptual categories, perceptions and consequent actions. For nominalists, there is no underlying reality to the social world beyond what people (social actors) attribute to it, and, because each person experiences and perceives reality differently, it makes more sense to talk about multiple realities rather than a single reality that is the same for everyone (Burrell and Morgan 2016). A less extreme version of this is **social constructionism**. This puts forward that reality is constructed through social interaction in which social actors create partially shared meanings and realities, in other words reality is constructed intersubjectively.

As social interactions between actors are a continual process, social phenomena are in a constant state of flux and revision. This means it is necessary as a researcher to study a situation in detail, including historical, geographical and socio-cultural contexts

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Box 4.1 Focus on student research

A management exodus at ChemCo

As part of a major organisational change, all the managers in the marketing department of the chemical manufacturer ChemCo left the organisation. They were replaced by new managers who were thought to be more in tune with the more commercially aggressive new culture that the organisation was trying to create. The new managers entering the organisation filled the roles of the managers who had left and had essentially the same formal job duties and procedures as their predecessors.

John wanted to study the role of management in ChemCo and in particular the way in which managers liaised with external stakeholders. He decided to use the new managers in the marketing department as his research 'subjects'.

In his research proposal he outlined briefly his research philosophy. He defined his ontological position as that of the objectivist. His reasoning was that management in ChemCo had a reality that was separate from the managers who inhabited that reality. He pointed to the fact that the formal management structure at ChemCo was largely unchanged from that which was practised by the managers who had left the organisation. The process of management would continue in largely the same way in spite of the change in personnel.

Emma also wanted to study the role of management in ChemCo; however, she wanted to approach her research from a subjectivist perspective. In her research proposal, Emma pointed out that even though the formal management structure at ChemCo remained the same, the demographics of the new management workforce were very different. Whereas the managers who had left the company had been mostly close to retirement age, male and white, the new managers were typically young and much more gender- and ethnically-diverse. Taken together with ChemCo's emphasis on the new organisational culture, this led Emma to question whether the formal job descriptions and processes were still interpreted by the new managers in the same way. Emma therefore decided to focus her research on the old and new managers' interpretations of organisational and managerial practices.

in order to understand what is happening or how realities are being experienced. Unlike an objectivist researcher who seeks to discover universal facts and laws governing social behaviour, the subjectivist researcher is interested in different opinions and narratives that can help to account for different social realities of different social actors. Subjectivists believe that as they actively contribute to the creation and use of these data they cannot detach themselves from their own values. They therefore openly acknowledge and actively reflect on and question their own values (Cunliffe (2003) calls this 'radical reflexivity') and incorporate these within their research.

Let us suppose that you have decided to research the portrayal of entrepreneurs by the media. Media producers, like other social actors, may interpret the situations which they are filming differently as a consequence of their own view of the world. Their different interpretations are likely to affect their actions and the nature of the films and television programmes they produce. From a subjectivist view, the media producers' portrayals you are studying are a product of these producers' interaction with their environments and their seeking to make sense of it through their interpretation of events and the meanings that they draw from these events. As a subjectivist researcher, it is your role to seek to understand the different realities of the media producers in order to be able to make sense of and understand their portrayals of entrepreneurs in a way that is meaningful (Box 4.2), all the while reflecting on why you as a researcher might yourself be more drawn towards or convinced by some media portrayals rather than others. All this is some way from the objectivist position that being an entrepreneur is an objective reality that is the same for everyone, and that there is

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only one correct way of perceiving that reality, regardless of who is doing the perceiving. The subjectivist view is that the portrayal of entrepreneurship is constructed through the social interactions between entrepreneurs, media narratives, and those who are reading, watching or writing about those narratives. The portrayal of entrepreneurship is continually being revised as a result of this, even as we write these words and you read them. In other words, at no time is there a definitive entity called 'entrepreneur'. Entrepreneurs are experienced differently by different media producers and other social actors (including researchers) and, as an aggregate, the resultant portrayal is likely to be constantly changing.

Box 4.2 Focus on research in the news

Why do entrepreneurs get such a bad rap?

By Janan Ganesh

Nothing brings on early mid-life ennui* like watching friends set up their own businesses. When one describes his new venture to me, all forms of salaried life seem bloodless all of a sudden. It is not the prospect of riches (you can marry into that stuff) or even the freedom – I am less answerable to legal duties, bureaucratic wrangles, early mornings, late-night panics and the ordeal of managing people than he will ever be.

It is the blend of fun and high stakes. Every decision matters (above all recruitment) and is his to make. To imagine a product into being, to work in a field of personal interest, to influence the way people live: not all entrepreneurs do these things, but the ones who do need only break even to end up somewhere near the top of Maslow's hierarchy of needs.

And then they turn on the television and see a crew of spivs vying to impress a jaded martinet flanked by two stern-faced lieutenants. Criticism of *The Apprentice,* with its desolate picture of entrepreneurial life, is neither new nor effective. If there is something medieval about the show's idiots-in-a-cage concept, then viewers do not seem to mind. The new series of the UK version that starts this autumn is the 17th. An alumnus of the American version now governs the US.

As entertainment, it dazzles. As a portrait of business, it is poison. All commerce is shown as a racket spuriously dignified with mortifying TED-speak. 'Don't tell me the sky's the limit,' one boardroom Voltaire said, 'when there are footprints on the Moon.' The content of each 'task' matters less than the distribution of blame after the fact. To the artful bluffer, the spoils. Real-life business is full of ineloquent but impressive people. *The Apprentice* rewards the opposite. Its corporate veneer is such a sham: it is a superb show about politics.

By itself, though, *The Apprentice* is not the problem. The problem is that *The Apprentice* is all there is. You can watch TV from January to December without seeing a heroic or even benign account of money being made – one that does not involve a plagiarised product, a betrayed friend, a hoodwinked customer or a corner flagrantly cut.

FT *Abridged from:* 'Why do entrepreneurs get such a bad rap?', Janan Ganesh (2017) *Financial Times* 25 August. Copyright © 2017 The Financial Times Ltd

*Feeling of dissatisfaction arising from having nothing interesting or exciting to do. The word is often used in relation to a person's job.

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4.3 Research paradigms

Another dimension that can help you to differentiate between research philosophies relates to the political or ideological orientation of researchers towards the social world they investigate. This dimension has two opposing poles or extremes. Burrell and Morgan (2016) call these extremes 'sociology of regulation' (for short, regulation) and 'sociology of radical change' (simply, radical change). As we will see later, by combining the regulation and radical change dimension with the objectivism-subjectivism dimension Burrell and Morgan develop four sociological (research) paradigms for organisational analysis.

Regulation and radical change

Researchers working within the **regulation perspective** are concerned primarily with the need for the regulation of societies and human behaviour. They assume an underlying unity and cohesiveness of societal systems and structures. Much of business and management research can be classed as regulation research that seeks to suggest how organisational affairs may be improved within the framework of how things are done at present, rather than radically challenging the current position (Box 4.3). However, you may wish to do research precisely because you want to fundamentally question the way things are done in organisations, and, through your research, offer insights that would help to change the organisational and social worlds. In this case, you would be researching within the **radical change perspective**. Radical change research approaches organisational problems from the viewpoint of overturning the existing state of affairs. Such research is often visionary and utopian, being concerned with what is possible and alternatives to the accepted current position (Burrell and Morgan 2016). Table 4.2 summarises the differences between the regulation and radical change perspectives.

Much of business and management research undertaken from within the radical change perspective would fall within the area of management known as **Critical Management Studies (CMS)**. CMS researchers question not only the behaviour of individual managers but also the very societal systems within which that behaviour is situated. CMS research challenges their taken-for-granted acceptance of 'the best' or 'the only available' ways of organising societies and organisations (Fournier and Grey 2000). It therefore attempts to expose the problems and weaknesses, as well as the damaging effects, of these dominant ideas and practices.

Table 4.2 The regulation–radical change dimension

The regulation perspective . . .	⇔	The radical change perspective . . .
. . . *advocates the* status quo	⇔	. . . *advocates* radical change
. . . *looks for* order	⇔	. . . *looks for* conflict
. . . *looks for* consensus	⇔	. . . *questions* domination
. . . *looks for* integration and cohesion	⇔	. . . *looks for* contradiction
. . . *seeks* solidarity	⇔	. . . *seeks* emancipation
. . . *sees the* satisfaction of needs	⇔	. . . *sees* deprivation
. . . *sees the* actual	⇔	. . . *sees the* potential

Source: Developed from Burrell and Morgan (2016)

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CMS researchers also challenge dominant organisational ideas and practices, including 'management' itself. In his book *Against Management: Organization in the Age of Managerialism,* Martin Parker (2002) challenges the acceptance of management. Parker starts by acknowledging just how difficult and almost unthinkable it is to be against something like management, which shapes so completely our everyday lives in today's world. It is one thing, he writes, to question some aspects of management, or some of its effects, so that we can learn how to do management better. It is a completely different and much harder thing to be against management itself, as a whole and categorically – it is a bit like opposing buildings, society or air. Nevertheless, Parker insists, it is the latter, radical questioning of management that is the purpose of his book. Just because management is everywhere, he writes, does not mean that management is necessary or good, or that it is not worthwhile being against it.

Parker builds his radical critique by questioning three key assumptions typically made about management:

- management is part of scientific thought that allows human beings increasing control over their environment;
- management increases control over people;
- management is the best way to control people.

Questioning these assumptions might suggest that management is damaging to organisations and societies. For example, it might emphasise that the environment does not always benefit from being controlled by people, and that controlling employees in managerial ways is not necessarily good for organisations. Once fundamental assumptions about management are questioned, researchers are freer to think about proposing alternative ideas and practices, paving the way for radical societal change.

Sociological paradigms for organisational analysis

In their book *Sociological Paradigms and Organisational Analysis* (2016), Burrell and Morgan combine the objectivist–subjectivist continuum with a regulation–radical change continuum to create a 2×2 matrix of four distinct and rival 'paradigms' of organisational analysis (Figure 4.3). In their interpretation (and also as we use the term here)

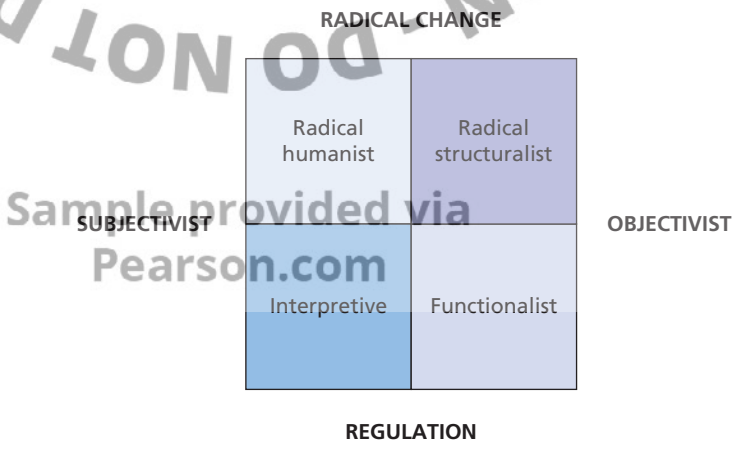

Figure 4.3 Four (research) paradigms for organisational analysis
Source: Developed from Burrell and Morgan (2016) *Sociological Paradigms and Organisational Analysis*

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a **paradigm** is a set of basic and taken-for-granted assumptions which underwrite the frame of reference, mode of theorising and ways of working in which a group operates. The matrix's four paradigms represent four different ways of viewing the social and organisational world.

In the bottom right corner of the matrix is the **functionalist paradigm**. This is located on the objectivist and regulation dimensions and is the paradigm within which most business and management research operates. Research in this paradigm is concerned with rational explanations and developing sets of recommendations within the current structures. Functionalist theories and models of management, such as business process re-engineering, are often generalised to other contexts, the idea being that they can be used universally providing they are correctly implemented and monitored (Kelemen and Rumens 2008). A key assumption you would be making here as a researcher is that organisations are rational entities, in which rational explanations offer solutions to rational problems. Research projects might include an evaluation study of a communication strategy to assess its effectiveness and to offer recommendations for improvement. Research carried out within the functionalist paradigm is most likely to be underpinned by a positivist research philosophy (Section 4.4), this type of research often being referred to as 'positivist-functionalist'.

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Box 4.3 Focus on student research

Researching the employees' understandings of psychological contract violation

Working within an interpretive paradigm, Robyn believed that reality is socially constructed, subjective and could be perceived in different ways by different people. While reading for her master's programme she had been surprised by how many of the research papers she read on the psychological contract (an individual's belief regarding the terms and conditions of a reciprocal agreement between themselves and another) focused on aggregate findings rather than the specific context of each individual situation. She considered that these researchers often ignored the individualistic and subjective nature of contracts as well as individuals' interpretations and responses. Robyn therefore decided her research would be concerned with what individual employees interpreted as employers' psychological contract violations, and how they understood the impact of violations on their own attitudes and behaviours. Based on a thorough review of the literature she developed three objectives:

- to provide a new understanding of how individuals interpreted their psychological contracts as being violated;
- to ascertain the ways in which individuals felt their attitudes towards their employer changed as a result of these violations;
- to explore attitudinal and behavioural consequences of this violation from the employees' perspective.

Robyn argued in her methodology chapter that, as a subjectivist, she was concerned with understanding what her research participants perceived to be the reality of their psychological contract violation as they constructed it. She stated her assumption that every action and reaction was based in a context that was interpreted by the participant as she or he made sense of what had happened. It was her participants' perceptions and their emotional reactions to these perceptions that would then inform their actions. Robyn also made clear in the methodology chapter that her research was concerned primarily with finding the meaning and emotions that each participant attached to their psychological contract violation and their reactions, rather than changing what happened in organisations. This she equated with the regulatory perspective.

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The bottom left corner of the matrix represents the **interpretive paradigm**. The primary focus of research undertaken within this paradigm is the way we as humans attempt to make sense of the world around us (Box 4.4). The concern you would have working within this paradigm would be to understand the fundamental meanings attached to organisational life. Far from emphasising rationality, it may be that the principal focus you have here is discovering multiple subjectivities. Concern with studying an organisation's communication strategy may focus on understanding the ways in which it fails due to unforeseen reasons, maybe reasons which are not apparent even to those involved with the strategy. This is likely to take you into the realm of the organisation's politics and the way in which power is used. Your concern here would be to become involved in the organisation's everyday activities in order to understand and explain what is going on, rather than change things (Kelemen and Rumens 2008).

In the top right corner of the matrix, combining objectivist and radical change, is the **radical structuralist paradigm**. Here your concern would be to approach your research with a view to achieving fundamental change based upon an analysis of organisational phenomena such as structural power relationships and patterns of conflict. You would be involved in understanding structural patterns within work organisations such as hierarchies and reporting relationships and the extent to which these may produce structural domination and oppression. You would adopt an objectivist perspective due to your concern with objective entities. Research undertaken within the radical structuralist paradigm

Box 4.4 Focus on management research

Understanding meanings of power through interpretative research

In their article in *Human Relations,* Berber and Acar (2020) explore what having power means to individuals at work. The authors argue that while there have been countless studies on the sources and uses of power at work, such studies have mostly focused on organisational structures and policies. Instead, Berber and Acar want to acknowledge the role of individuals as knowers of their own experiences. The authors do not seek to make generalisable claims but rather are interested in the richness of different interpretations of 'power' as a phenomenon that can offer a new understanding of power in organisations.

Berber and Acar use interpretative phenomenological analysis (IPA) which is designed to help researchers develop an in-depth understanding of phenomena through their participants' subjective perspectives relating to their lived experiences (Smith et al, 2012). In IPA a relatively small number of participants' perspectives are explored intensively and in great detail (Larkin et al, 2006). Berber and Acar's analysis draws on semi-structured interviews with 11 participants selected to represent a homogenous group, so that divergence and convergence of different views can be observed, and the richness of individual accounts can be maintained. Berber and Acar also analyse their participants' discussion of a short case about an overlord, which formed part of the interviews.

IPA helps Berber and Acar identify key themes that explain how their participants 'craft' their own versions of power at work. The themes point to a clear divide among their demographically homogenous group between 'position-based power holders' and 'territory holders'. Berber and Acar present their findings first thematically, illustrating the themes with interview extracts, and then focusing on two particular individuals' narratives to explore their experiences in-depth. This enables the authors to develop the concept of 'power crafting' as a conceptual contribution, positioning it in relation to previous understandings of power in organisations.

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is often underpinned by a critical realist philosophy (Section 4.4), although such researchers differentiate themselves from extreme objectivists.

Finally, the **radical humanist paradigm** is located within the subjectivist and radical change dimensions. As we noted earlier, the radical change dimension adopts a critical perspective on organisational life. It emphasises both the political nature of organisational realities and the consequences that one's words and deeds have upon others (Kelemen and Rumens 2008). Working within this paradigm you would be concerned with changing the status quo. As with the radical structuralist paradigm, your primary focus would concern the issues of power and politics, domination and oppression. However, you would approach these concerns from within a subjectivist ontology, which would lead you to emphasise the importance of social construction, language, processes, and instability of structures and meanings in organisational realities.

Burrell and Morgan's (2016) book, although contentious, has been highly influential in terms of how organisational scholarship is seen. One of the most strongly disputed aspects of their work is the idea of **incommensurability**: the assertion that the four paradigms contain mutually incompatible assumptions and therefore cannot be combined. This debate is often referred to as 'paradigm wars' and has implications for thinking about the relationship between paradigms and research philosophies.

Research paradigms and research philosophy

Whether or not you think that different research paradigms can be combined will depend to some extent on your own research philosophy and, going back to our discussion of philosophies as a set of assumptions, the extremity of your views on these continua (Table 4.1) and within paradigms (Figure 4.3). You will see later (Section 4.4) that pragmatists seek to overcome dichotomies such as objectivism–subjectivism in their research, and as such are quite likely to engage in multi-paradigmatic research. Critical realists, who are less objectivist than positivists, embrace 'epistemological relativism', which may include more subjectivist as well as objectivist research, ranging from radical structuralism to radical humanism. Burrell and Morgan's four paradigms for organisational analysis can therefore act as a helpful tool for mapping different research philosophies. This highlights that the connections between paradigms and research philosophies need to be seen in terms of philosophical affinity rather than equivocality, being treated with some caution and reflexivity. You will find such reflexivity easier as you become familiar with individual research philosophies.

There are good reasons to find the relationship between research paradigms and research philosophies confusing. In management research there tends to be little agreement about labels in general, and the labels 'paradigms' and 'philosophies' (and often others like 'approaches' and 'schools of thought') are sometimes used interchangeably to describe assumptions researchers make in their work. Alongside the substantial body of literature in which Burrell and Morgan's (2016) four sociological research paradigms are taken as the more-or-less enduring foundation of the management field, and in which a 'research paradigm' is taken to be specifically one of the four paradigms described by Burrell and Morgan, there is other research in which the term 'paradigm' is treated much more loosely. As a result, you may find yourself reading about, for example, the 'paradigm' (rather than 'philosophy') of positivism (see e.g. Lincoln et al. 2018).

In a similar way, you may find yourself reading about ideas that seem to cross the boundary between a 'paradigm' and a 'philosophy' (and also perhaps cross over into a 'methodology'). One example of this is the participatory inquiry – an intellectual position that emphasises experiential and practical learning and knowing, and the active

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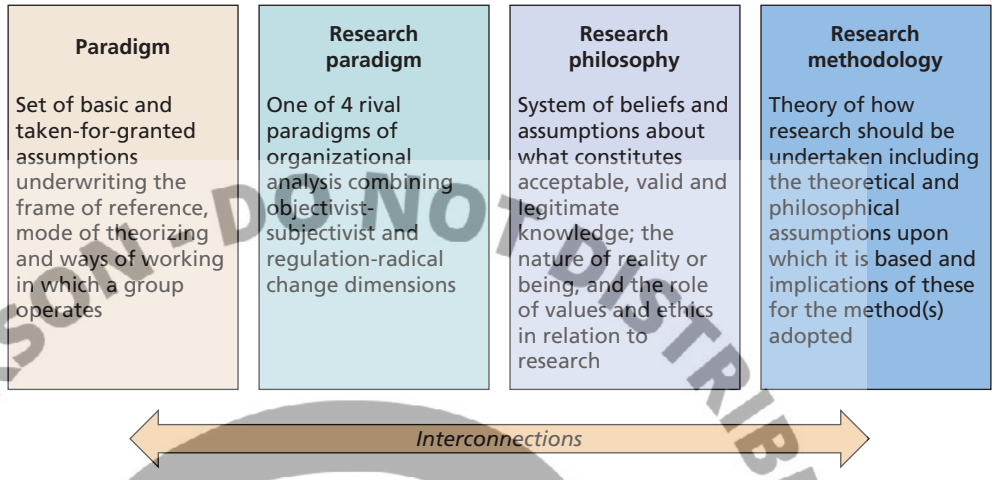

Figure 4.4 Paradigms, philosophy and methodology definitions

involvement of research participants in the making of knowledge throughout the research process. Heron and Reason (1997) call the participatory inquiry a 'paradigm' and use it to critique Guba and Lincoln's earlier (1994) work on competing paradigms. Heron and Reason also describe the ontological, epistemological and axiological foundations of the participatory inquiry (as well as its methodological implications), as we do with five management philosophies in this chapter.

Given this confusion of labels and philosophical ideas we have summarised the definitions we use in Figure 4.4. As you develop as a researcher, you will continue to further your knowledge through reading and experience, and will begin to form your own opinions about which labels and debates matter to you personally. For now, if you are just starting out on your research journey, putting some of this complexity on hold (but being aware that it exists) and using our definitions offer a good starting point. Being more familiar with the basics can also help you interpret more complex issues. For example, being familiar with the pragmatist research philosophy can help you spot how pragmatism tends to underpin and inform participatory action research.

4.4 Five management philosophies

In this section, we discuss five major philosophies in business and management: positivism, critical realism, interpretivism, postmodernism and pragmatism (Table 4.3).

Positivism

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We introduced the research philosophy of positivism briefly in our discussion of objectivism and functionalism earlier in this chapter. **Positivism** relates to the philosophical stance of the natural scientist and entails working with an observable social reality to produce law-like generalisations. It promises unambiguous and accurate knowledge and originates in the works of Francis Bacon, Auguste Comte and the early twentieth-century group of philosophers and scientists known as the Vienna Circle. The label positivism refers to the importance of what is 'posited' – i.e. 'given'. This emphasises the positivist focus on strictly scientific empiricist method designed to yield pure data and facts uninfluenced by

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Table 4.3 Comparison of five research philosophies in business and management research

Ontology (nature of reality or being)	Epistemology (what constitutes acceptable knowledge)	Axiology (role of values)	Typical methods
	Positivism		
Real, external, independent One true reality (universalism) Granular (things) Ordered	Scientific method Observable and measurable facts Law-like generalisations Numbers Causal explanation and prediction as contribution	Value-free research Researcher is detached, neutral and independent of what is researched Researcher maintains objective stance	Typically deductive, highly structured, large samples, measurement, typically quantitative methods of analysis, but a range of data can be analysed
	Critical realism		
Stratified/layered (the empirical, the actual and the real) External, independent Intransient Objective structures Causal mechanisms	Epistemological relativism Knowledge historically situated and transient Facts are social constructions Historical causal explanation as contribution	Value-laden research Researcher acknowledges bias by world views, cultural experience and upbringing Researcher tries to minimise bias and errors Researcher is as objective as possible	Retroductive, in-depth historically situated analysis of pre-existing structures and emerging agency Range of methods and data types to fit subject matter
	Interpretivism		
Complex, rich Socially constructed through culture and language Multiple meanings, interpretations, realities Flux of processes, experiences, practices	Theories and concepts too simplistic Focus on narratives, stories, perceptions and interpretations New understandings and worldviews as contribution	Value-bound research Researchers are part of what is researched, subjective Researcher interpretations key to contribution Researcher reflexive	Typically inductive Small samples, in-depth investigations, qualitative methods of analysis, but a range of data can be interpreted
	Postmodernism		
Nominal Complex, rich Socially constructed through power relations Some meanings, interpretations, realities are dominated and silenced by others Flux of processes, experiences, practices	What counts as 'truth' and 'knowledge' is decided by dominant ideologies Focus on absences, silences and oppressed/repressed meanings, interpretations and voices Exposure of power relations and challenge of dominant views as contribution	Value-constituted research Researcher and research embedded in power relations Some research narratives are repressed and silenced at the expense of others Researcher radically reflexive	Typically deconstructive – reading texts and realities against themselves In-depth investigations of anomalies, silences and absences Range of data types, typically qualitative methods of analysis

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Pragmatism

Complex, rich, external 'Reality' is the practical consequences of ideas Flux of processes, experiences and practices	Practical meaning of knowledge in specific contexts 'True' theories and knowledge are those that enable successful action Focus on problems, practices and relevance Problem solving and informed future practice as contribution	Value-driven research Research initiated and sustained by researcher's doubts and beliefs Researcher reflexive	Following research problem and research question Range of methods: mixed, multiple, qualitative, quantitative, action research Emphasis on practical solutions and outcomes

human interpretation or bias (Table 4.3). Today there is a 'bewildering array of positivisms', Crotty (1998) noting as many as 12 varieties.

If you were to adopt an extreme positivist position, you would see organisations and other social entities as real in the same way as physical objects and natural phenomena are real. Epistemologically you would focus on discovering observable and measurable facts and patterns, and only phenomena that you can observe and measure would lead to the production of credible and meaningful data (Crotty 1998). You would look for causal relationships in your data to create law-like generalisations like those produced by scientists. You would use these universal rules and laws to help you explain and predict behaviour and events in organisations.

As a positivist researcher you might use existing theory to develop hypotheses. These are statements providing hypothetical explanations that can be tested and confirmed, in whole or part, or refuted, leading to the further development of theory which then may be tested by further research. However, this does not mean that, as a positivist, you necessarily have to start with existing theory. All natural sciences have developed from an engagement with the world in which data were collected and observations made prior to hypotheses being formulated and tested. In fact, the original positivists emphasised the importance of inductive research due to the importance of empirical data, even though nowadays positivist research tends to be deductive (see Section 4.5). The hypotheses developed, as in Box 4.5, would lead to the gathering of facts (rather than impressions) that would provide the basis for subsequent hypothesis testing.

As a positivist you would try to remain neutral and detached from your research and data in order to avoid influencing your findings. This means that you would undertake research, as far as possible, in a value-free way. For positivists, this is a plausible position, because of the measurable, quantifiable data that they collect. They claim to be external to the process of data collection as there is little that can be done to alter the substance of the data collected. Consider, for example, the differences between data collected using an online questionnaire (Chapter 11) in which the respondent self-selects from responses predetermined by the researcher, and in-depth interviews (Chapter 10). In the online questionnaire, the researcher determines the list of possible responses as part of the design process. Subsequent to this she or he can claim that her or his values do not influence the answers given by the respondent. In contrast, an in-depth interview necessitates the researcher framing the questions in relation to each participant and interpreting their answers. Unlike in a questionnaire, these questions are unlikely to be asked in exactly the same way. Rather the interviewer exercises judgment in what to ask to collect participant-led accounts that are as rich as possible.

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Box 4.5 Focus on student research

The development of hypotheses

Brett was conducting a piece of research for his project on the economic benefits of working from home during the Covid-19 pandemic. He studied the literature on home working and read two dissertations in his university's library that dealt with the same phenomenon, albeit that they did not relate specifically to the pandemic. As a result of his reading, Brett developed a number of theoretical propositions, each of which contained specific hypotheses. One of his propositions related to the potential increased costs associated with home working.

THEORETICAL PROPOSITION: Increased costs may negate the productivity gains from home working.

From this he developed four SPECIFIC HYPOTHESES:

1. Increased costs for computer hardware, software, telecommunications equipment and office furniture will negate the productivity gains from home working.
2. Home workers will require additional information-technology and wellbeing support, which will negate the productivity gains from home working.
3. Increased supervisory requirements will negate the productivity gains from home working.
4. Reduced face-to-face access by home workers to colleagues will result in lost opportunities to increase efficiencies, which will negate the productivity gains from home working.

Positivist researchers are likely to use a highly structured methodology in order to facilitate replication. Furthermore, the emphasis will be on quantifiable observations that lend themselves to statistical analysis (Box 4.5). However, as you will read in later chapters, sometimes positivist research extends itself to other data collection methods and seeks to quantify qualitative data, for example by applying hypothesis testing to data originally collected in in-depth interviews.

You may believe that excluding our own values as researchers is impossible. Even a researcher adopting a positivist stance exercises choice in the issue to study, the research objectives to pursue and the data to collect. Indeed, it could be argued the decision to try to adopt a value-free perspective suggests the existence of a certain value position! How can a researcher completely avoid influencing what is researched, even using methods considered 'objective', when she or he formulates the questions in the questionnaire or sets the parameters and conditions of the experiment? And therefore, how can a researcher stop their personal views developing into biases that prejudice their research?

If you are following this line of thinking, you are treading in the footsteps of many scholars and thinkers who have critiqued positivism. Some of these thinkers – most famously Karl Popper – have become associated with a philosophical movement called **postpositivism**, which has sought to both question positivism and reform it to address critique. The questioning of positivism has also contributed to the development of the other four research philosophies we discuss below.

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Critical realism

It is important not to confuse the philosophy of critical realism with the more extreme form of realism underpinning the positivist philosophy. The latter, sometimes known as **direct realism** (or naïve empirical scientific realism), says that what you see is what you get: what we experience through our senses portrays the world accurately. By contrast, the philosophy of **critical realism** focuses on explaining what we see and experience, in terms

of the underlying structures of reality that shape the observable events. Critical realism originated in the late twentieth century in the work of Roy Bhaskar, as a response to both positivist direct realism and postmodernist nominalism (discussed later), and occupies a middle ground between these two positions (Reed 2005).

For critical realists, reality is the most important philosophical consideration, a structured and layered ontology being crucial (Fleetwood 2005). Critical realists see reality as external and independent, but not directly accessible through our observation and knowledge of it (Table 4.3). Rather, what we experience is 'the empirical', in other words sensations, which are some of the manifestations of the things in the real world, rather than the actual things. Critical realists highlight how often our senses deceive us. When you next watch a cricket match on television you are likely to see an advertisement for the sponsor on the actual playing surface. This advertisement appears to be standing upright on the pitch. However, this is an illusion. It is, in fact, painted on the grass. So we see sensations, which are representations of what is real.

Critical realism claims there are two steps to understanding the world. First, there are the sensations and events we experience. Second, there is the mental processing that goes on sometime after the experience, when we 'reason backwards' from our experiences to the underlying reality that might have caused them (this reasoning backwards is essentially abductive, but is often called 'retroduction' by critical realists (Reed 2005) – see Section 4.5). Direct realism says that the first step is enough. To pursue our cricket example, the umpire who is a direct realist would say about her or his umpiring decisions: 'I give them as they are!' The umpire who is a critical realist would say: 'I give them as I see them!' Critical realists would point out that what the umpire has observed (the 'Empirical') is only a small part of everything that he or she could have seen; a small fraction of the sum total of the 'Actual' events that are occurring at any one point in time (Figure 4.5). A player may, perhaps, have obscured the umpire's view of another player committing a foul. Critical realists would emphasise that what the umpire has not seen are the underlying causes (the 'Real') of a situation (Figure 4.5). For example, was a head-butt a real, intentional foul, or an accident? The umpire cannot experience the real significance of the situation directly. Rather, she or he has to use her/his sensory data of the 'Empirical' as observed and use reasoning to work it out.

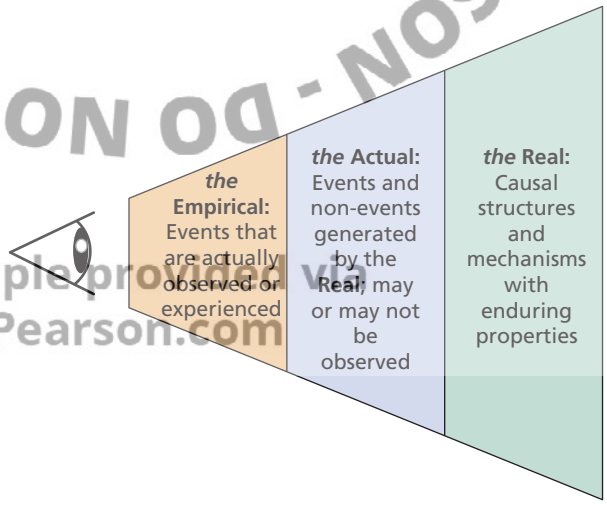

Figure 4.5 Critical realist's stratified ontology
Source: Developed from Bhaskar (2008)

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If you believe that, as researchers, we need to look for the bigger picture of which we see only a small part, you may be leaning towards the critical realist philosophy. Bhaskar (2011) argues that we will only be able to understand what is going on in the social world if we understand the social structures that have given rise to the phenomena that we are trying to understand. He writes that we can identify what we do not see through the practical and theoretical processes of the social sciences. Critical realist research therefore focuses on providing an explanation for observable organisational events by looking for the underlying causes and mechanisms through which deep social structures shape everyday organisational life. Due to this focus, much of critical realist research takes the form of in-depth historical analysis of social and organisational structures, and how they have changed over time (Reed 2005).

Within their focus on the historical analysis of structures, critical realists embrace epistemological relativism (Reed 2005), a (mildly) subjectivist approach to knowledge. **Epistemological relativism** recognises that knowledge is historically situated (in other words, it is a product of its time and is specific to it), and that social facts are social constructions agreed on by people rather than existing independently (Bhaskar 2008). This implies critical realist notions of causality cannot be reduced to statistical correlations and quantitative methods, and a range of methods is acceptable (Reed 2005). A critical realist's axiological position follows from the recognition that our knowledge of reality is a result of social conditioning (e.g. we know that if the cricket player runs into an advertisement that is actually standing up he or she will fall over!) and cannot be understood independently of the social actors involved. This means that, as a critical realist researcher, you would strive to be aware of the ways in which your socio-cultural background and experiences might influence your research, and would seek to minimise such biases and be as objective as possible.

Interpretivism

Interpretivism, like critical realism, developed as a critique of positivism but from a subjectivist perspective. **Interpretivism** emphasises that humans are different from physical phenomena because they create meanings. Interpretivists study these meanings. Interpretivism emerged in early- and mid-twentieth-century Europe, in the work of German, French and occasionally English thinkers, and is formed of several strands, most notably hermeneutics, phenomenology and symbolic interactionism (Crotty 1998). Interpretivists argue that human beings and their social worlds cannot be studied in the same way as physical phenomena, and that therefore social sciences research needs to be different from natural sciences research rather than trying to emulate the latter (Table 4.3). As different people of different cultural backgrounds, under different circumstances and at different times make different meanings, and so create and experience different social realities, interpretivists are critical of the positivist attempts to discover definite, universal 'laws' that apply to everybody. Rather they believe rich insights into humanity are lost if such complexity is reduced entirely to a series of law-like generalisations.

The purpose of interpretivist research is to create new, richer understandings and interpretations of social worlds and contexts. For business and management researchers, this means looking at organisations from the perspectives of different groups of people. They would argue that the ways in which, for example, the CEO, board directors, managers, warehouse assistants and cleaners of a large online retail company see and experience the organisation are different, so much so that they could arguably be seen as experiencing

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different workplace realities. If research focuses on the experiences that are common to all at all times, much of the richness of the differences between them and their individual circumstances will be lost, and the understanding of the organisation that the research delivers will reflect this. Furthermore, differences that make organisations complex are not simply constrained to different organisational roles. Male or female employees, or those from different ethnic/cultural backgrounds, may experience workplaces in different ways. Interpretations of what on the surface appears to be the same thing (such as a particular product, process, or outcome) can differ between historical or geographical contexts.

Interpretivist researchers try to take account of this complexity by collecting what is meaningful to their research participants (Box 4.6). Different strands of interpretivism place slightly different emphasis on how to do this in practice, so **phenomenologists,** who study existence, focus on participants' lived experiences; that is, the participants' recollections and interpretations of those experiences (Box 4.4). **Hermeneuticists** focus on the study of cultural artefacts such as texts, symbols, stories, and images. **Symbolic interactionists,** whose tradition derives from pragmatist thinking (discussed later in this section) and who see meaning as something that emerges out of interactions between people, focus on the observation and analysis of social interaction such as conversations, meetings, and teamwork. In general, interpretivists emphasise the importance of language, culture and history (Crotty 1998) in the shaping of our interpretations and experiences of organisational and social worlds.

With its focus on complexity, richness, multiple interpretations and meaning-making, interpretivism is explicitly subjectivist. An axiological implication of this is that interpretivists recognise that their interpretation of research materials and data, and thus their own values and beliefs, play an important role in the research process. Crucial to the interpretivist philosophy is the researcher adopting an empathetic stance. The challenge for the interpretivist is to enter the social world of the research participants and understand that world from their point of view. Some would argue the interpretivist perspective is highly appropriate in the case of business and management research. Not only are business situations complex, they are often unique, at least in terms of context. They reflect a particular set of circumstances and interactions involving individuals coming together at a specific time.

Box 4.6 Focus on management research

Emotional journeys when initiating workplace improvements

Bindl's (2019) research on proactive employees who initiate improvement at work sought to understand their emotional journeys when making things happen. In her qualitative study she adopted an interpretivist philosophy, immersing herself in the data as she alternated between collection, analysis and theorising. Her paper in *Human Relations* outlines how she investigated a multinational company's service centre employers' and managers' emotional experiences to develop theory. Derived from data from 60 face-to-face interviews with 39 participants about their experiences and overt observations from shadowing 15 participants, Bindl argues that her findings provide an in-depth account in the service centre of emotional experiences the process of engaging in proactivity. These reveal that employees' journeys took alternative emotional paths, giving rise to either frustration, fear or excitement, joy and pride; and impacting differently on their future willingness to be proactive.

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Postmodernism

Postmodernism (not to be confused with postmodernity, which denotes a particular historical era) emphasises the role of language and of power relations, seeking to question accepted ways of thinking and give voice to alternative marginalised views (Table 4.3). It emerged in the late twentieth century and has been most closely associated with the work of French philosophers Jean-François Lyotard, Jacques Derrida, Michel Foucault, Gilles Deleuze, Félix Guattari and Jean Baudrillard. Postmodernism is historically entangled with the intellectual movement of poststructuralism. As the differences in focus between postmodernism and poststructuralism are subtle and have become less discernible over time, in this chapter we will focus on one label, postmodernism.

Postmodernists go even further than interpretivists in their critique of positivism and objectivism, attributing even more importance to the role of language (Table 4.3). They reject the modern objectivist, realist ontology of things, and instead emphasise the chaotic primacy of flux, movement, fluidity and change. They believe that any sense of order is provisional and foundationless, and can only be brought about through our language with its categories and classifications (Chia 2003). At the same time they recognise that language is always partial and inadequate. In particular, it always marginalises, suppresses and excludes aspects of what it claims to describe, while privileging and emphasising other aspects. As there is no order to the social world beyond that which we give to it through language, there is no abstract way of determining the 'right' or the 'true' way to describe the world. Instead, what is generally considered to be 'right' and 'true' is decided collectively. These collective 'choices', in turn, are shaped by the power relations and by the ideologies that dominate particular contexts (Foucault 2020). This does not mean the dominant ways of thinking are necessarily the 'best' – only that they are seen as such at a particular point in time by particular groups of people. Other perspectives that are suppressed are potentially just as valuable and have the power to create alternative worlds and truths.

Postmodernist researchers seek to expose and question the power relations that sustain dominant realities (Calás and Smircich 2018). This takes the form of 'deconstructing' (taking apart) these realities, as if they were texts, to search for instabilities within their widely accepted truths, and for what has not been discussed – absences and silences created in the shadow of such truths (Derrida 2016). Postmodernists strive to make what has been left out or excluded more visible by the deconstruction of what counts as 'reality' into ideologies and power relations that underpin it, as you would dismantle an old building into the bricks and mortar that make it up. The goal of postmodern research is therefore to radically challenge the established ways of thinking and knowing (Kilduff and Mehra 1997) and to give voice and legitimacy to the suppressed and marginalised ways of seeing and knowing that have been previously excluded (Chia 2003).

As a postmodernist researcher, you would, instead of approaching the organisational world as constituted by things and entities such as 'management', 'performance' and 'resources', focus on the ongoing processes of organising, managing and ordering that constitute such entities. You would challenge organisational concepts and theories, and seek to demonstrate what perspectives and realities they exclude and leave silent and whose interests they serve. You would be open to the deconstruction of any forms of data – texts, images, conversations, voices and numbers. Like interpretivists, you would be undertaking in-depth investigations of organisational realities. Fundamental to postmodernist research is the recognition that power relations between the researcher and research

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subjects shape the knowledge created as part of the research process. As power relations cannot be avoided, it is crucial for researchers to be open about their moral and ethical positions (Calás and Smircich 2018), and thus you would strive to be radically reflexive about your own thinking and writing (Cunliffe 2003).

Pragmatism

By now you may be thinking: do these differences in assumptions really matter? The proponents of the philosophies discussed above would say that they do, as they delineate fundamentally different ways of seeing the world and carrying out research. However, you may be feeling differently. If you are becoming impatient with the battle of ontological, epistemological and axiological assumptions between the different philosophies, if you are questioning their relevance, and if you would rather get on with research that would focus on making a difference to organisational practice, you may be leaning towards the philosophy of pragmatism. However, you need to be sure that you are not treating pragmatism as an escape route from the challenge of understanding other philosophies!

Pragmatism asserts that concepts are only relevant where they support action (Kelemen and Rumens 2008). Pragmatism originated in the late-nineteenth-early-twentieth-century USA in the work of philosophers Charles Pierce, William James and John Dewey. It strives to reconcile both objectivism and subjectivism, facts and values, accurate and rigorous knowledge and different contextualised experiences (Table 4.3). It does this by considering theories, concepts, ideas, hypotheses and research findings not in an abstract form, but in terms of the roles they play as instruments of thought and action, and in terms of their practical consequences in specific contexts (Table 4.3; Box 4.7). Reality matters to pragmatists as practical effects of ideas, and knowledge is valued for enabling actions to be carried out successfully.

For a pragmatist, research starts with a problem, and aims to contribute practical solutions that inform future practice. Researcher values drive the reflexive process of inquiry, which is initiated by doubt and a sense that something is wrong or out of place, and which recreates belief when the problem has been resolved (Elkjaer and Simpson 2011). As pragmatists are more interested in practical outcomes than abstract distinctions, their research may have considerable variation in terms of how 'objectivist' or 'subjectivist' it turns out to be. If you were to undertake pragmatist research, this would mean that the most important determinant for your research design and strategy would be the research problem that you would try to address, and your research question. Your research question, in turn, would be likely to incorporate the pragmatist emphasis of practical outcomes.

If a research problem does not suggest unambiguously that one particular type of knowledge or method should be adopted, this only confirms the pragmatist's view that it is perfectly possible to work with different types of knowledge and methods. This reflects a recurring theme in this book – that multiple methods are often possible, and possibly highly appropriate, within one study (see Section 5.3). Pragmatists recognise that there are many different ways of interpreting the world and undertaking research, that no single point of view can ever give the entire picture and that there may be multiple realities. This does not mean that pragmatists always use multiple methods; rather they use the method or methods that enable credible, well-founded, reliable and relevant data to be collected that advance the research (Kelemen and Rumens 2008).

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Box 4.7 Focus on management research

Researching accounting practices

In an article in the *Journal of Applied Accounting*, Rutherford (2016) highlights the schism between accounting practices and accounting research. Within this he comments that for over four decades academics have undertaken relatively little 'classical accounting research' (p. 119), that is research on practices of accounting such as financial reporting. Rutherford notes that one barrier to academics undertaking such research is the lack of a theoretical base. This, he argues, can be overcome by using pragmatism as the underpinning for theorisation, thereby providing a clear philosophical justification for research to improve practice. Resumption of such research would, he considers, contribute positively to future accounting standard-setting.

4.5 Approaches to theory development

We emphasised that answering your research question will involve the use of theory (Chapter 2). That theory may or may not be made explicit in the design of the research (Chapter 5), although it will usually be made explicit in your presentation of the findings and conclusions. The extent to which answering your research question involves theory testing or theory building raises an important issue regarding the design of your research project. This is often portrayed as two contrasting approaches to the reasoning you adopt: deductive or inductive; although as we highlight in Table 4.4 reasoning can, alternatively, be abductive. Deductive reasoning occurs when the conclusion is derived logically from a set of theory-derived premises, the conclusion being true when all the premises are true (Ketokivi and Mantere 2010). For example, our research might ask: to what extent is demand likely to exceed supply for a soon-to-be-launched new mobile phone? We form three premises:

- that retailers have been allocated limited stock of the new mobile phones by the manufacturer;
- that customers' demand for the phones exceeds supply;
- that retailers allow customers to pre-order the phones.

If these premises are true we can deduce that the conclusion that online will have 'sold' their entire allocation of the new mobile phone by the release day will also be true.

In contrast, in inductive reasoning there is a gap in the logic argument between the conclusion and the premises observed, the conclusion being 'judged' to be supported by the observations made (Ketokivi and Mantere 2010). Returning to our question regarding the likely demand for a soon-to-be-launched mobile phone, we would start with observations about the forthcoming launch. Our observed premises would be:

- that news media are reporting that retailers are complaining about only being allocated limited stock of the new mobile phone by manufacturers;
- that news media are reporting that demand for the phones will exceed supply;
- that retailers are allowing customers to pre-order the phones.

Based on these observations, we have good reason to believe retailers' demand will have exceeded supply and they will have 'sold' their entire allocation of the new mobile phone by the release day. However, although our conclusion is supported by our observations, it is not guaranteed. In the past, manufacturers have launched new phones which have had underwhelming sales (Griffin 2019).

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There is also a third approach to theory development that is just as common in research, abductive reasoning, which begins with a 'surprising fact' being observed (Ketokivi and Mantere 2010). This surprising fact is the conclusion rather than a premise. Based on this conclusion, a set of possible premises is determined that is considered sufficient or nearly sufficient to explain the conclusion. It is reasoned that, if this set of premises were true, then the conclusion would be true as a matter of course. Because the set of premises is sufficient (or nearly sufficient) to generate the conclusion, this provides reason to believe that it is also true. Returning once again to our example of the likely retail demand for a soon-to-be-launched new mobile phone, a surprising fact (conclusion) might be that retailers are reported in the news media as stating they will have no remaining stock of the new mobile phone for sale on the day of its release. However, if the retailers are allowing customers to pre-order the mobile phone prior to its release then it would not be surprising if these retailers had already sold their allocation of phones. Therefore, using abductive reasoning, the possibility that retailers have no remaining stock on the day of release is reasonable.

Building on these three approaches to theory development (Figure 4.1), if your research starts with theory, often developed from your reading of the academic literature, and you design a research strategy to test the theory, you are using a **deductive approach** (Table 4.4). Conversely, if your research starts by collecting data to explore a phenomenon and you generate or build theory (often in the form of a conceptual framework), then you are using an **inductive approach** (Table 4.4). Where you are collecting data to explore a phenomenon, identify themes and explain patterns, to generate a new or modify an existing theory that you subsequently test through additional data collection, you are using an **abductive approach** (Table 4.4).

Table 4.4 Deduction, induction and abduction: from reason to research

	Deduction	Induction	Abduction
Logic	In a deductive inference, when the premises are true, the conclusion must also be true	In an inductive inference, known premises are used to generate untested conclusions	In an abductive inference, known premises are used to generate testable conclusions
Generalisability	Generalising from the general to the specific	Generalising from the specific to the general	Generalising from the interactions between the specific and the general
Use of data	Data collection is used to evaluate propositions or hypotheses related to an existing theory	Data collection is used to explore a phenomenon, identify themes and patterns and create a conceptual framework	Data collection is used to explore a phenomenon, identify themes and patterns, locate these in a conceptual framework and test this through subsequent data collection and so forth
Theory	Theory falsification or verification	Theory generation and building	Theory generation or modification; incorporating existing theory where appropriate, to build new theory or modify existing theory
Philosophical underpinning*	Positivism (Pragmatism)	Interpretivism (Critical realism) (Postmodernism) (Pragmatism)	(Interpretivism) Critical realism Postmodernism Pragmatism

* brackets indicate use is less frequent within this philosophy

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The next three sub-sections explore the differences and similarities between these three approaches and their implications for your research.

Deduction

As noted earlier, deduction owes much to what we would think of as scientific research. It involves the development of a theory that is then subjected to a rigorous test through a series of propositions. As such, it is the dominant approach to theory development in natural science research, where laws present the basis of explanation, allow the anticipation of phenomena, predict their occurrence and therefore permit them to be controlled.

Blaikie and Priest (2019) list sequential steps through which a deductive approach will progress:

1. Put forward a tentative idea, a premise, a hypothesis (a testable proposition about the relationship between two or more concepts or variables) or set of hypotheses to form a theory.
2. By using existing literature, or by specifying the conditions under which the theory is expected to hold, deduce a testable proposition or number of propositions.
3. Examine the premises and the logic of the argument that produced them, comparing this argument with existing theories to see if it offers an advance in understanding. If it does, then continue.
4. Test the premises by collecting appropriate data to measure the concepts or variables and analysing them.
5. If the results of the analysis are not consistent with the premises (the tests fail!), the theory is false and must either be rejected or modified and the process restarted.
6. If the results of the analysis are consistent with the premises then the theory is corroborated.

Deduction possesses several important characteristics. First, there is the search to explain causal relationships between concepts and variables. It may be that your research question is: Why is there high employee absenteeism in a retail store? After reading about absence patterns in the academic literature you develop a theory that there is a relationship between absence, the age of workers and length of service. Consequently, you develop a number of hypotheses, including one which states absenteeism is significantly more likely to be prevalent among younger workers and another which states absenteeism is significantly more likely to be prevalent among workers who have been employed by the organisation for a relatively short period of time. To test these hypotheses you collect quantitative data. (This is not to say that a deductive approach may not use qualitative data.) It may be there are important differences in the way work is arranged in different stores: therefore you would need to specify precisely the conditions under which your theory is likely to hold and collect appropriate data within these conditions. By doing this you would help to ensure that any change in absenteeism was a function of worker age and length of service rather than any other aspect of the store, for example the way employees were managed. Your research would use a highly **structured methodology** to facilitate replication, an important issue to ensure reliability, as we emphasise in Section 5.11.

An additional important characteristic of deduction is that concepts need to be **operationalised** to enable facts to be measured, often quantitatively. In our example, one variable needing to be measured is absenteeism. Just what constitutes absenteeism would have to be strictly defined: an absence for a complete day would probably count, but what about absence for two hours? In addition, what would constitute a 'short period of employment' and 'younger' employees? What is happening here is that the principle of

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reductionism is being followed. This holds problems as a whole are better understood if they are reduced to the simplest possible elements.

The final characteristic of deduction is **generalisation.** In order to be able to generalise it is necessary to select our sample carefully and for it to be of sufficient size (Sections 7.2 and 7.3). In our example above, research at a particular store would allow us only to make inferences about that store; it would be dangerous to predict that worker youth and short length of service lead to absenteeism in all cases. This is discussed in more detail in Section 5.11.

As a scientific approach that emphasises structure, quantification, generalisability and testable hypotheses, the deductive approach is most likely to be underpinned by the positivist research philosophy.

Induction

An alternative approach to answering the question and developing theory on retail store employee absenteeism would be to start by interviewing a sample of the employees and their line managers about the experience of working at the store. The purpose here would be to get a feel of what was going on, so as to understand better the nature of employee absenteeism. Your task then would be to make sense of the interview data you collected through your analysis. The result of this analysis would be the formulation of a theory, often expressed as a conceptual framework. This may be that there is a relationship between absence and the length of time an employee has worked for the retail store. Alternatively, you may discover that there are other competing reasons for absence that may or may not be related to employee age or length of service. You may end up with the same theory, but your reasoning uses an inductive approach: theory follows data rather than vice versa, as with deduction.

We noted earlier that deduction has its origins in research in the natural sciences. However, the emergence of the social sciences in the twentieth century led social science researchers to be wary of deduction. They were critical of a reasoning approach that enabled a cause–effect link to be made between particular variables without an understanding of the way in which humans interpreted their social world. Developing such an understanding is, of course, the strength of an inductive approach. In our absenteeism example, if you were adopting an inductive approach you would be treating employees as humans whose attendance is a consequence of how they perceive their work experience, rather than as unthinking research objects responding mechanistically to certain circumstances.

Followers of induction criticise deduction's tendency to construct a rigid methodology that does not permit alternative explanations of what is going on. In that sense, there is an air of finality about the choice of theory and definition of the hypothesis in deduction. Alternative theories may be suggested, but these would be within the limits set by the highly structured research design. In this respect, a significant characteristic of the absenteeism research design noted earlier is the operationalisation of concepts. As we saw in the absenteeism example, age was precisely defined. However, a less structured approach might reveal alternative explanations of the absenteeism–age relationship denied by a more strict definition.

Research using an inductive approach to reasoning is likely to be particularly concerned with the context in which such events take place. Therefore, the study of a small sample of subjects might be more appropriate than a large number as with the deductive approach. Researchers in this tradition are more likely to work with qualitative data and to use a variety of methods to collect these data in order to establish different views of phenomena (as will be seen in Chapter 10).

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Due to its connection to humanities and its emphasis on the importance of subjective interpretations, the inductive approach is most likely to be informed by the interpretivist philosophy (Table 4.4).

Abduction

Instead of moving from theory to data (as in deduction) or data to theory (as in induction), an abductive approach moves between data and theory, making comparisons and interpretations, in effect combining deduction and induction (Suddaby 2006). Although Arthur Conon Doyle (1989) refers to the detective Sherlock Holmes as using deduction, he is actually using abduction. An abductive researcher, in a similar manner to Sherlock Holmes 'selects or invents a provisional hypothesis to explain a particular empirical case or dataset . . . and pursu[es] this hypothesis through further investigation' (Kennedy and Thornberg 2018: 52). Abductive theory development is therefore open and sensitive to data while also using pre-existing theories for inspiration and to help identify and interpret patterns. This, as we have noted earlier, matches what many business and management researchers actually do. It begins with the observation of a surprising phenomenon or fact; it then works out a plausible theory of how this could have occurred. Van Maanen et al. (2007) note that some plausible theories can account for what is observed better than others and it is these theories that will help lead to more surprises. These, they argue, can occur at any stage in the research process, including when writing your project report! Van Maanen et al. also stress that deduction and induction complement abduction as logics for testing plausible theories.

Box 4.8 Focus on management research

Developing empirical knowledge and theory abductively through engaged research

Participative and engaged research, in which research participants play an active role in co-designing the research project with researchers, often requires an abductive research approach. In their paper in *Management Learning,* Bristow and colleagues (2021) draw on their engaged ethnography (Cunliffe and Scaratti 2017; Van de Ven 2007) in a major city policing organisation to explore the politics of organisational learning. The authors explain that the engaged nature of their project meant that they were deeply embedded in the police organisation they were researching and also themselves implicated in the politics of learning of which they write. Conversely, the police officers, staff and senior leaders in their study contributed to shaping their study through ongoing negotiation of the direction and themes that emerged during the course of the project. This has also led to a succession of theoretical lenses that were adopted and developed through an iterative, abductive process.

Bristow and colleagues note the importance of multiple sources of data (observation notes, semi-structured interviews and organisational documents) and multiple points of reference (within the research team itself and among their policing colleagues) for empirical themes and conceptual frameworks to gain resonance through multiple abductive cycles. This process, the authors argue, has enabled them to develop theory (a dialectical approach to the politics of learning) in a way that is better able to reflect the complexities of organisational life. In turn, their emergent theoretical lens has enabled them to explore how four different political modalities of learning interplay in complex and contradictory ways within the policing organisation, thus helping them make an empirical as well as a theoretical contribution to knowledge.

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Applying an abductive approach to our research on the reasons for high employee absenteeism in a retail store would mean obtaining data that were sufficiently detailed and rich to allow us to explore the phenomenon and identify and explain themes and patterns regarding employee absenteeism. We would then try to integrate these explanations in an overall conceptual framework, thereby developing a theory of employee absenteeism in a retail store. This we would test using evidence provided by existing data and new data, revising as necessary (Box 4.8).

Due to the flexibility of the abductive approach, it can be used by researchers from within a number of different research philosophies. In fact, some would argue that because pure deduction or pure induction are so difficult (or even impossible) to achieve, most management researchers in practice use at least some element of abduction. However, a well-developed abductive approach is most likely to be underpinned by pragmatism or postmodernism, and can also be underpinned by critical realism.

The abductive approach is sometimes called 'retroduction'. In fact, **retroduction** is believed to be the original label for what has become known as abduction through corrupt translation and misunderstanding of older philosophical texts (Peirce 1896). Apart from this trivia, the notion 'retroduction' may be important to you as a researcher if your chosen research philosophy is critical realism. Critical realists often choose to describe their approach as retroductive in order to emphasise the historical aspect of their research, where they would start with a surprising phenomenon in the present and move backwards in time in order to identify the underlying mechanisms and structures that might have produced it (Reed 2005).

Choosing an approach to theory development

At this stage you may be asking yourself: So what? Why is the choice that I make about my approach to theory development so important? Easterby-Smith et al. (2012) suggest three reasons. First, it enables you to take a more informed decision about your research design (Chapter 5), which is more than just the procedures by which data are collected and techniques by which they are analysed. It is the overall configuration of a piece of research involving questions about what kind of evidence is gathered and from where, and how such evidence is interpreted in order to provide good answers to your initial research question.

Second, it will help you to think about those research strategies and methodological choices that will work for you and, crucially, those that will not. For example, if you are particularly interested in understanding why something is happening, rather than being able to describe what is happening, it may be more appropriate to undertake your research inductively rather than deductively.

Third, Easterby-Smith et al. (2012) argue that knowledge of the different research traditions enables you to adapt your research design to cater for constraints. These may be practical, involving, say, limited access to data, or they may arise from a lack of prior knowledge of the subject. You simply may not be in a position to frame a hypothesis because you have insufficient understanding of the topic to do this.

So far, when discussing induction and deduction we have conveyed the impression that there are rigid divisions between deduction and induction. This would be misleading. As we have seen in our discussion of abduction, it is possible to combine deduction and induction within the same piece of research. It is also, in our experience, often advantageous to do so, although often one approach or another is dominant.

At this point you may be wondering whether your reasoning will be predominantly deductive, inductive or abductive. The honest answer is, 'it depends'. In particular, it

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depends on your research philosophy, the emphasis of the research (Box 4.9) and the nature of the research topic. Different philosophies tend to lead researchers to different approaches: so positivists tend to deduction, interpretivists to induction, and postmodernists, pragmatists and critical realists to abduction (although critical realists would often call their approach 'retroduction') (Table 4.4). A topic on which there is a wealth of literature from which you can define a theoretical framework and a hypothesis lends itself more readily to deduction. With research into a topic that is new, is exciting much debate and on which there is little existing literature, it may be more appropriate to work inductively by generating data and analysing and reflecting upon what theoretical themes the data are suggesting. Alternatively, a topic about which there is a wealth of information in one context but far less in the context in which you are researching may lend itself to an abductive approach, enabling you to modify an existing theory.

The time you have available will be an issue. Deductive research can be quicker to complete, albeit that time must be devoted to setting up the study prior to data collection and analysis. Data collection is often based on 'one take'. It is normally possible to predict the time schedules accurately. On the other hand, abductive and, particularly, inductive research can be much more protracted. Often the ideas, based on a much longer period of data collection and analysis, emerge gradually. This leads to another important consideration, the extent to which you are prepared to indulge in risk. Deduction can be a lower-risk strategy, although there are risks, such as the non-return of questionnaires. With induction and abduction, you have to live with the uncertainty about when and how useful and interesting data patterns and theory will emerge. Finally, there is the question of audience. In our experience, managers are usually most familiar with deduction and more likely to put faith in the conclusions emanating from this approach. You may also wish to consider the preferences of the person marking your research report. We all have our preferences about the approach to adopt.

Box 4.9 Focus on student research

Deductive, inductive and abductive research

Sadie decided to conduct a research project to answer the question: To what extent does violence at work affect the stress levels of staff and why? She considered the different ways she would approach the work were she to adopt:

- the deductive approach;
- the inductive approach;
- the abductive approach.

If she adopted a deductive approach to her reasoning, she would have to:

1 start with the hypothesis that staff working directly with the public are more likely to experience the threat or reality of violence and resultant stress;
2 decide to research a population in which she would have expected to find evidence of violence, for example, a sizeable social security office;
3 administer a questionnaire to a large sample of staff in order to establish the extent of violence (either actually experienced or threatened) and the levels of stress experienced by them;
4 be particularly careful about how she defined violence;
5 standardise the stress responses of the staff, for example, days off sick or sessions with a counsellor.

If she adopted an inductive approach then she might have decided to interview a sample of staff who had been subjected to violence at work. She might have been interested in their feelings about the events that they had experienced, how they coped with the

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problems they experienced and their views about the possible causes of the violence.

If she adopted an abductive approach, she might have developed a conceptual model on the basis of her interviews. She might then have used this model to develop a series of hypotheses and designed a questionnaire to collect data from a sample of staff with which to test these hypotheses. Based on analyses of these data she might then have refined her conceptual model.

All approaches would have yielded valuable data about this problem (indeed, within this abductive approach, both inductive and deductive approaches would have been used at different stages) and supported theory development. Sadie concluded that no approach should be thought of as better than the others. Each is better at different things. Sadie realised that she needed to decide where her research emphasis lay and choose her research approach accordingly.

This last point suggests that not all your decisions about the approach to reasoning should always be practically based. Hakim (2000) uses an architectural metaphor to illustrate this. She introduces the notion of the researcher's preferred style, which, rather like the architect's, may reflect 'the architect's own preferences and ideas . . . and the stylistic preferences of those who pay for the work and have to live with the final result' (Hakim 2000: 1). This echoes the feelings of Buchanan et al. (2013: 59), who argue that 'needs, interests and preferences (of the researcher) . . . are typically overlooked but are central to the progress of fieldwork'. However, a note of caution. While researchers often refine their research questions as the research progresses, changing completely the essence of the research question can be problematic, if only because you only have a limited amount of time to complete your research project. Ensuring that the essence of the research question does not change is particularly important if it has been defined by an organisation, for example, as a consultancy project they wish you to undertake.

4.6 Summary

- The term 'research philosophies' refers to systems of beliefs and assumptions about the development of knowledge. This means that your research philosophy contains important assumptions about the way in which you view the world. These assumptions shape all aspects of your research projects.
- To understand your research philosophy, you need to develop the skill of reflexivity, which means asking yourself questions about your beliefs and assumptions, and treating these with the same scrutiny as you would apply to the beliefs of others.
- From the pluralist perspective adopted in this book, there is no single 'best' business and management research philosophy. Each philosophy contributes a unique and valuable way of seeing the organisational world.
- All research philosophies make at least three major types of assumption: ontological, epistemological and axiological. We can distinguish different philosophies by the differences and similarities in their ontological, epistemological and axiological assumptions.
  - Ontology concerns researchers' assumptions about the nature of the world and reality. Ontological assumptions you make determine what research objects and phenomena you focus on, and how you see and approach them.
  - Epistemology concerns assumptions about knowledge – how we know what we say we know, what constitutes acceptable, valid and legitimate knowledge, and how we can

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communicate knowledge to fellow human beings. Epistemological assumptions you make determine what sort of contribution to knowledge you can make as a result of your research.
    - Axiology refers to the role of values and ethics within the research process, which incorporates questions about how we, as researchers, deal with our own values and also with those of our research participants.
- Research philosophies can be differentiated in terms of where their assumptions fall on an objectivism–subjectivism continua.
    - Objectivism incorporates assumptions of the natural sciences. It entails realist ontology (which holds that social entities exist in reality external to and independent from social actors), epistemology focused on the discovery of truth by means of observable, measurable facts, and claims to have a value-free, detached axiology.
    - Subjectivism incorporates assumptions of the arts and humanities. It entails nominalist ontology (which holds that social phenomena are created through the language, perceptions and consequent actions of social actors), epistemology focused on the social actors' opinions, narratives, interpretations, perceptions that convey these social realities, and claims to have a value-bound, reflexive axiology.
- Management and business research can be understood in terms of Burrell and Morgan's (2016) four social research paradigms: functionalist, interpretive, radical structuralist and radical humanist. These paradigms add the dimension of the political rationale for research to the objectivism–subjectivism continua.
- We have discussed five major philosophies: positivism, critical realism, interpretivism, postmodernism and pragmatism.
    - Positivism relates to the philosophical stance of the natural scientist. This entails working with an observable social reality and the end product can be law-like generalisations similar to those in the physical and natural sciences.
    - Critical realism focuses on explaining what we see and experience in terms of the underlying structures of reality that shape the observable events. Critical realists tend to undertake historical analyses of changing or enduring societal and organisational structures, using a variety of methods.
    - Interpretivism is a subjectivist philosophy, which emphasises that human beings are different from physical phenomena because they create meanings. Interpretivists study meanings to create new, richer understandings of organisational realities. Empirically, interpretivists focus on individuals' lived experiences and cultural artefacts, and seek to include their participants' as well as their own interpretations into their research.
    - Postmodernism emphasises the world-making role of language and power relations. Postmodernists seek to question the accepted ways of thinking and give voice to alternative worldviews that have been marginalised and silenced by dominant perspectives. Postmodernists deconstruct data to expose the instabilities and absences within them. Postmodernist axiology is radically reflexive.
    - Pragmatist ontology, epistemology and axiology are focused on improving practice. Pragmatists adopt a wide range of research strategies, the choice of which is driven by the specific nature of their research problems.
- There are three main approaches to theory development: deduction, induction and abduction.
    - With deduction, a theory and hypothesis (or hypotheses) are developed and a research strategy designed to test the hypothesis.
    - With induction, data are collected and a theory developed as a result of the data analysis.
    - With abduction (sometimes referred to as retroduction by critical realists), data are used to explore a phenomenon, identify themes and explain patterns, to generate a new or modify an existing theory which is subsequently tested, often through additional data collection.

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Self-check questions

Help with these questions is available at the end of the chapter.

4.1 You have decided to undertake a project and have defined the main research question as 'What are the opinions of consumers on a 10 per cent reduction in weight, with the price remaining the same, of "Snackers" chocolate bars?' Write a hypothesis that you could test in your project.

4.2 Why may it be argued that the concept of 'the manager' is socially constructed rather than 'real'?

4.3 Why are the radical research paradigms relevant in business and management research, given that most managers would say that the purpose of organisational investigation is to develop recommendations for action to solve problems without radical change?

4.4 You have chosen to undertake your research project following a deductive approach. What factors may cause you to work inductively, although working deductively is your preferred choice?

Review and discussion questions

4.5 Visit an online database or your university library and obtain a copy of a research-based refereed journal article that you think will be of use to an assignment you are currently working on. Read this article carefully. From within which philosophical perspective do you think this article is written? Use Section 4.4 to help you develop a clear justification for your answer.

4.6 Think about the last assignment you undertook for your course. In undertaking this assignment, were you predominantly inductive, deductive or abductive? Discuss your thoughts with a friend who also undertook this assignment.

4.7 Agree with a friend to watch the same television documentary.

- **a** To what extent is the documentary inductive, deductive or abductive in its use of data?
- **b** Is the documentary based on positivist, critical realist, interpretivist, postmodernist or pragmatist assumptions?
- **c** Do not forget to make notes regarding your reasons for your answers to each of these questions and to discuss your answers with your friend.

Progressing your research project

Heightening your Awareness of your Research Philosophy (HARP)*

HARP is a reflexive tool that has been designed by Bristow and Saunders to help you explore your research philosophy. It is just a starting point for enabling you to ask yourself more refined questions about how you see research. It will not provide you with a definitive answer to the question 'What is my research philosophy?' Rather it will give you an indication as to where your views are similar to and different from those of five major philosophical traditions discussed in this chapter. Do not be surprised if your views are similar to more than one tradition. Such potential tensions are an ideal opportunity to inquire into and examine your beliefs further.

HARP consists of six sections each comprising five statements (a total of 30 statements). Each section considers one aspect of philosophical beliefs (ontology, epistemology, axiology, purpose of research, meaningfulness of data and structure/agency). Each statement epitomises a particular research philosophy's position in relation to that particular aspect.

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Progressing your research project (*continued*)

Heightening your Awareness of your Research Philosophy (HARP)

By indicating your agreement or disagreement with each statement you can discover your similarities and differences with different aspects of each research philosophy. Following the completion of HARP, refer to the scoring key to calculate your score and interpret your answer.

HARP statements

	Please indicate your agreement or disagreement with the statements below. There are no wrong answers.	Strongly Agree	Agree	Slightly Agree	Slightly Disagree	Disagree	Strongly Disagree
Your views on the nature of reality (ontology)							
1	Organisations are real, just like physical objects.	❑	❑	❑	❑	❑	❑
2	Events in organisations are caused by deeper, underlying mechanisms.	❑	❑	❑	❑	❑	❑
3	The social world we inhabit is a world of multiple meanings, interpretations and realities.	❑	❑	❑	❑	❑	❑
4	'Organisation' is not a solid and static thing but a flux of collective processes and practices.	❑	❑	❑	❑	❑	❑
5	'Real' aspects of organisations are those that impact on organisational practices.	❑	❑	❑	❑	❑	❑
Your views on knowledge and what constitutes acceptable knowledge (epistemology)							
6	Organisational research should provide scientific, objective, accurate and valid explanations of how the organisational world really works.	❑	❑	❑	❑	❑	❑
7	Theories and concepts never offer completely certain knowledge, but researchers can use rational thought to decide which theories and concepts are better than others.	❑	❑	❑	❑	❑	❑
8	Concepts and theories are too simplistic to capture the full richness of the world.	❑	❑	❑	❑	❑	❑
9	What generally counts as 'real', 'true' and 'valid' is determined by politically dominant points of view.	❑	❑	❑	❑	❑	❑
10	Acceptable knowledge is that which enables things to be done successfully.	❑	❑	❑	❑	❑	❑
Your views on the role of values in research (axiology)							
11	Researchers' values and beliefs must be excluded from the research.	❑	❑	❑	❑	❑	❑
12	Researchers must try to be as objective and realistic as they can.	❑	❑	❑	❑	❑	❑
13	Researchers' values and beliefs are key to their interpretations of the social world.	❑	❑	❑	❑	❑	❑

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HARP statements

Please indicate your agreement or disagreement with the statements below. There are no wrong answers.		Strongly Agree	Agree	Slightly Agree	Slightly Disagree	Disagree	Strongly Disagree
14	Researchers should openly and critically discuss their own values and beliefs.	❑	❑	❑	❑	❑	❑
15	Research shapes and is shaped by what the researcher believes and doubts.	❑	❑	❑	❑	❑	❑
Your views on the purpose of research							
16	The purpose of research is to discover facts and regularities, and predict future events.	❑	❑	❑	❑	❑	❑
17	The purpose of organisational research is to offer an explanation of how and why organisations and societies are structured.	❑	❑	❑	❑	❑	❑
18	The purpose of research is to create new understandings that allow people to see the world in new ways.	❑	❑	❑	❑	❑	❑
19	The purpose of research is to examine and question the power relations that sustain conventional thinking and practices.	❑	❑	❑	❑	❑	❑
20	The purpose of research is to solve problems and improve future practice.	❑	❑	❑	❑	❑	❑
Your views on what constitutes meaningful data							
21	Things that cannot be measured have no meaning for the purposes of research.	❑	❑	❑	❑	❑	❑
22	Organisational theories and findings should be evaluated in terms of their explanatory power of the causes of organisational behaviour.	❑	❑	❑	❑	❑	❑
23	To be meaningful, research must include participants' own interpretations of their experiences, as well as researchers' interpretations.	❑	❑	❑	❑	❑	❑
24	Absences and silences in the world around us are at least as important as what is prominent and obvious.	❑	❑	❑	❑	❑	❑
25	Meaning emerges out of our practical, experimental and critical engagement with the world.	❑	❑	❑	❑	❑	❑
Your views on the nature of structure and agency							
26	Human behaviour is determined by natural forces.	❑	❑	❑	❑	❑	❑
27	People's choices and actions are always limited by the social norms, rules and traditions in which they are located.	❑	❑	❑	❑	❑	❑
28	Individuals' meaning-making is always specific to their experiences, culture and history.	❑	❑	❑	❑	❑	❑
29	Structure, order and form are human constructions.	❑	❑	❑	❑	❑	❑
30	People can use routines and customs creatively to instigate innovation and change.	❑	❑	❑	❑	❑	❑

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Progressing your research project (*continued*)

Heightening your Awareness of your Research Philosophy (HARP)

Your answer scores

Give yourself the points as indicated below for each answer within each philosophical tradition. The different philosophies are represented by specific questions in the HARP as indicated below. Fill each philosophy table with your answer scores, then total up the numbers for each philosophy. (For your reference, in the tables below, the letters in brackets indicate whether the question tests your agreement with the ontological, epistemological, axiological, purpose of research, meaningfulness of data and structure and agency aspects of research philosophy.)

Each answer you gave is given a number of points as shown in the table below:

Strongly agree	Agree	Slightly agree	Slightly disagree	Disagree	Strongly disagree
3	2	1	–1	–2	–3

Positivism: Questions 1, 6, 11, 16, 21, 26

Question	1 (ontology)	6 (epistemology)	11 (axiology)	16 (purpose)	21 (data)	26 (structure/agency)	Total
Answer score							

Critical Realism: Questions 2, 7, 12, 17, 22, 27

Question	2 (ontology)	7 (epistemology)	12 (axiology)	17 (purpose)	22 (data)	27 (structure/agency)	Total
Answer score							

Interpretivism: Questions 3, 8, 13, 18, 23, 28

Question	3 (ontology)	8 (epistemology)	13 (axiology)	18 (purpose)	23 (data)	28 (structure/agency)	Total
Answer score							

Postmodernism: Questions 4, 9, 14, 19, 24, 29

Question	4 (ontology)	9 (epistemology)	14 (axiology)	19 (purpose)	24 (data)	29 (structure/agency)	Total
Answer score							

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Pragmatism: Questions 5, 10, 15, 20, 25, 30

Question	5 (ontology)	10 (epistemology)	15 (axiology)	20 (purpose)	25 (data)	30 (structure/agency)	Total
Answer score							

Reflection

Now, for the first of what will almost certainly be many philosophical reflections, consider the following questions regarding how you scored yourself.

1. Do you have an outright philosophical winner? Or do you have a close contention between two or more philosophies?
2. Why do you think this is?
3. Which philosophy do you disagree with the most?
4. Why do you think this is?

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Further reading

Brinkmann, S. and Kvale, S. (2015) *InterViews* (3rd edn). Los Angeles, CA: Sage. Chapter 3 provides an accessible discussion of the epistemological issues associated with interviewing.

Burrell, G. and Morgan, G. (2016) *Sociological Paradigms and Organisational Analysis.* Abingdon: Routledge. This is an excellent facsimile of the original 1979 book on paradigms which goes into far more detail than space has allowed in this chapter.

Hatch, M.J. and Yanow, D. (2008) 'Methodology by metaphor: Ways of seeing in painting and research', *Organization Studies,* Vol. 29, No. 1, pp. 23–44. A really enjoyable paper that uses the metaphor of paintings by Rembrandt and Pollock to explain differences between realism and interpretivism.

Kelemen, M. and Rumens, N. (2008) *An Introduction to Critical Management Research.* London: Sage. This contains an excellent chapter on pragmatism as well as going into considerable detail on other philosophies, including postmodernism, and theoretical perspectives not covered in this chapter (for example, feminism and queer theory).

Kennedy, B.L. and Thornberg, R. (2018) 'Deduction, induction and abduction', in U. Flick (ed.) *The Sage Handbook of Qualitative Data Collection.* London: Sage, pp. 49–64. This chapter offers an excellent and insightful discussion of deduction, induction and abduction, particularly in relation to qualitative research.

Tsoukas, H. and Chia, R. (2011) *Research in the Sociology of Organizations,* Vol. 32: *Philosophy and Organization Theory.* Bradford: Emerald Publishing. This book offers excellent in-depth reading about the role of philosophy in management research, and about individual philosophies, including pragmatism, interpretivism (hermeneutics and phenomenology) and postmodernism. There is also a chapter about combining (triangulating) philosophies.

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Case 4
Working out your philosophical assumptions

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During her undergraduate degree, Ailsa had a baby and became interested in the question of how women combine tertiary education with raising a child and the extent to which universities support such students. Now, for her master's degree research project, she wishes to explore these questions further.

Ailsa is deciding how best to approach her project. She is drawn to qualitative methods, and in-depth interviews in particular, because she has always been fascinated by people's stories. She has also been reading about feminist research and how it emphasises 'giving voice' to women, creating close relationships with them, and co-creating knowledge (Jaggar, 2016; Mauthner, 2020a). Ailsa feels that a feminist approach would work well for her study because she wants to take the experiences of students like her as the starting point for her research and use them to help universities develop better support mechanisms for students experiencing pregnancy and motherhood.

She discusses these ideas with her friend Jasmin who is doing a PhD on female entrepreneurs using a feminist perspective. Jasmin tells her about the importance of being 'reflexive' when you do research, and how feminists – and other researchers – see this as an important part of the research process. Jasmin explains that reflexivity is when the researcher recognises how her subjectivity, social location, biography, worldview, conceptual frameworks and philosophical assumptions influence your research question and how you do your research (Mauthner and Doucet, 2003). This makes a lot of sense to Ailsa as she knows that her own experiences of pregnancy and motherhood as a student have informed her choice of research topic. She can also see how her personality, combined with feminist ideas, are shaping how she is approaching her study, the method she wants to use and the kinds of relationships she wants to build with the women in her study. She particularly likes the way reflexivity will foreground her own role, as the researcher, in co-producing knowledge with these students.

But Ailsa is less sure about what her philosophical assumptions are, let alone how they will impact on her study. She asks two friends, Jamal and Duncan, who are also doing master's degrees how they are approaching this issue. They both say that research philosophies are not important. They just want to get on with the research. What is the point in worrying about these abstract ideas, they ask her. What difference will it make to her research project? Ailsa isn't really sure how to answer these questions, but she recalls Jasmin explaining that research philosophies do matter because they influence the kinds of research questions that you ask, what you take as your object of study, and how you decide to study it. Jasmin also told her that even if she didn't state her research philosophy explicitly it would still shape her research but in invisible ways (Mauthner, 2020b). This has convinced Ailsa that she needs to try to understand better this aspect of her research.

She reads about research philosophies in several textbooks; makes a list of different philosophical approaches; and completes the HARP (Heightening Awareness of Research

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Philosophy) quiz (see: 'Progressing your research project' for Chapter 4). She feels overwhelmed by the number of philosophical positions and terms ending in 'ism', and struggles to grasp the differences between them. Ailsa decides to try to translate these abstract ideas into a series of concrete questions and apply them to her particular project to help her work out her philosophical position:

Ailsa's questions for working out her philosophical position

What is ontology?
Ontology refers to the assumptions that researchers make about the nature of the reality that they are studying.

What is the 'reality' that I am studying in my project?
The experiences of female students having a baby while at university and their perceptions of university support mechanisms.

What do I think is the nature of this reality?
I am not sure. I am not sure I even understand the question.

Do I think there is a universal, fixed, singular experience of students having a baby while at university?
This is my translation of what I think 'objectivism' means. Another word used to refer to this seems to be 'realism'. My answer to this question is no, I don't think so, because women will have lots of different experiences of having a baby and of the support provided by universities.

Do I think that the women's experiences are specific and particular to each one of them and that there are therefore multiple experiences?
This is my translation of what I think 'subjectivism' means. And my answer to this question is yes. I also think that their experiences change over time, and that they will have different experiences of the support provided (or not) by universities.

On the basis of these questions what do I think my ontological position is?
I think it is subjectivism.

What is epistemology?
Epistemology refers to the assumptions that researchers make about how knowledge of the reality that they are studying is produced and justified.

How am I developing knowledge about the women's experiences in my study?
I am interviewing them to get their accounts of their experiences.

Do I think that these interview accounts are giving objective facts about their experiences?
This is my translation of what I think 'positivism' means. My answer to this question is no, I don't think so. I think that women will give me their subjective interpretations of their experiences and will probably be making sense of their experiences as they talk to me about them. I have noticed that this is what I do. Talking about my thoughts and feelings is a way of making sense of them. I also think that I am interpreting their stories in a particular way – some things they say will resonate with my own experiences and maybe I will pay more attention to those parts of their accounts. So, I think that I am also involved in interpreting their stories. I think this is partly what reflexivity means.

Do I think that women's interview accounts are subjective interpretations of these experiences?
This is my translation of what I think 'subjectivism' means in relation to epistemology. And yes, as I said above, I think that the female students are forming opinions and attributing meaning to their experiences and what has happened to them.

On the basis of these questions what do I think my epistemological position is?
I think that my epistemological position is subjectivism.

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Ailsa concludes that her ontological and epistemological positions are subjectivism and her overall philosophy is interpretivism. She is unsure though about whether and how she can bring together an interpretivist philosophy with a feminist perspective. She has also been reading about research paradigms and she is wondering what paradigm will be compatible with her interpretive and feminist approach. She will ask her friend Jasmin and her lecturer for advice on these questions, but at least she feels that she has made a start. She has a better understanding of various philosophical terms and positions, and most importantly, how to apply this knowledge to her particular study.

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Questions

1. Ailsa is excited that she's beginning to understand research philosophies and why they matter. What might she tell her two sceptical friends, Jamal and Duncan, to convince them that it is important to reflect on and explain their philosophical assumptions?
2. What might Ailsa's friend Jasmin say about bringing together an interpretivist philosophy with a feminist perspective?
3. How might Ailsa's tutor advise her on choosing a research paradigm that fits with an interpretivist approach?

Additional case studies

These are available via this book's companion website:
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They are:

- Marketing music products alongside emerging digital music channels (focussing on the importance of ontology, epistemology, interpretivist and positivist philosophies);
- Consultancy research for a not-for-profit organisation (focusing on pragmatism and differences between this and post-positivist and interpretivist philosophies);
- Organisational learning in an English regional theatre (focusing on the importance of axiology and the interpretivist philosophy);
- Chinese tourists and their duty-free shopping in Guam (focusing on the positivist philosophy and the need for researcher independence).
- In search of research philosophy (focusing on the use and interpretation of the HARP reflexive tool).

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Self-check answers

4.1 Probably the most realistic hypothesis here would be 'consumers of "Snackers" chocolate bars did not notice the difference between the current bar and its reduced weight successor'. Doubtless that is what the Snackers' manufacturer would want confirmed!

4.2 Although you can see and touch a manager, you are only seeing and touching another human being. The point is that the role of the manager is a socially constructed concept. What counts as 'a manager' will differ between different national and organisational cultures and will differ over time. Indeed, the concept of the manager as we generally understand it is a relatively recent human invention, arriving at the same time as the formal organisation in the past couple of hundred years.

4.3 The researcher working in the radical humanist or structuralist paradigms may argue that they expect managers to prefer recommendations that do not involve radical change because radical change may involve changing managers! Radicalism implies root-and-branch investigation and possible change, and most of us prefer 'fine-tuning' within the framework of what exists already, particularly if change threatens our vested interests.

4.4 The question implies an either/or choice. But as you work through this chapter (and, in particular, the next one on deciding your research design), you will see that life is rarely so clear-cut! Perhaps the main factor that would cause you to review the appropriateness of the deductive approach would be that the data you collected might suggest an important hypothesis, which you did not envisage when you framed your research objectives and hypotheses. This may entail going further with the data collection, perhaps by engaging in some qualitative work, which would yield further data to answer the new hypothesis.

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