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Methodology Matters; Even More

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This editorial essay reflects on the importance of a section like Methodology Matters and its first two years. It also introduces the six articles in this issue of the European Management Review (EMR) that follow this essay and have progressed successfully through the review process for publication and it suggests ways in which the debates that each of those articles have started may be extended. This introduction also justifies other additions to the agenda that appeared in the original call for papers for submissions to this section of EMR.

Introduction

It is less than two years since I (Lee, 2018) had the pleasure of introducing the first article to be published in the *Methodology Matters* section of the *European Management Review (EMR)*; namely Reissner's (2018) idea of a conversational space map to aid reflexivity for researchers whose capacity for visual perception was greater than their capability for textual recognition. Since then, there has been the publication of papers by: Schumacher (2018) who proposed a practitioner-practitioner-researcher inquiry group as a means of promoting academics and managers' collaboration in industry; Cassell and Bishop (2019) who discussed the different types of understanding of the same qualitative database that may be obtained by applying metaphoric, story-telling and thematic forms of analysis; and Li *et al.* (2019) who reflected on the merits of some of the assumptions that are made in statistical analysis.

These publications vindicate the decision to introduce the *Methodology Matters* section. As explained at the time of its inception, provision of such a section in an established journal like *EMR* helped overcome the problem that is faced by new journals discussing research issues, namely their low ratings in ranking indices because of their limited history. Although there is an odd established methodological journal in the management area and there has been the occasional special themed issue on methodological concerns in other general management journals, restricted publication opportunities may have contributed to limitations in our knowledge of the strengths and drawbacks of different methodological approaches and the factors that either facilitate or obstruct their application. As Pritchard (2020) notes, space constraints in most journal articles prevent detailed outline of the methodological framework used when reporting an empirical study that forms the substantive part of many articles. Having full-length articles simply about

methodological issues in *Methodology Matters* provides an important space for such discussions to take place.

The original call for papers for *Methodology Matters* expressed a desire for plurality and for articles that looked beyond the simple technical issues of applying a method to look at the influence of the context on the actual practice of research. *Methodology Matters* has certainly realized its objective of pluralism, already including papers on quantitative (Li *et al.*, 2019) and qualitative methods (Cassell and Bishop, 2019). It has also realized the objective of looking beyond the technicalities of methods to the environment in which people conduct research as illustrated by Reissner's (2018) discussion on the capacities of different researchers and Schumacher's (2018) consideration of academics' collaboration with practitioners. This plurality and contextualized understanding is also evident in the range of papers that appear in the extended *Methodology Matters* section below.

Before proceeding to review the articles that are published below, it is of value to comment on a key reason for desk-rejection of many articles submitted to *Methodology Matters* and why I have discouraged formal submission of numerous others that have been sent to me informally with the authors asking my opinion of their suitability for the section. Overwhelmingly, such rejection and discouragement is for one particular reason. *Methodology Matters* was established to provide a peer-reviewed outlet for articles that make a methodological contribution. The majority of articles that I receive either after or before formal submission, do not do that. They provide an empirical study where the authors state they have conducted their research in a slightly different way to how other authors have reported on their methods. That does not make a methodological contribution *per se*. The substantive content of those papers remain the empirical study and the authors only provide mention of a methodological contribution at best

as a subsidiary consideration, but generally only in passing.

To be appropriate for submission to *Methodology Matters*, the substantive contribution of an article must be a methodological one. This has clear implications for how prior literature is likely to be reviewed. It should be methodological literature that is reviewed and where substantive studies are considered, the focus should be on the relevant parts of their methodological discussion. Of course, this does not preclude the use of empirical material for illustrative purposes. Examples of this have already been published in *Methodology Matters* – for instance, Cassell and Bishop's (2019) discussion of the different types of insights that are obtained when applying different forms of qualitative analysis technique to the same database of evidence – or appear in this issue, such as Wulff and Villadsen's comparison of the findings from different types of experiment on the same topic to address the methodological point of the value of each, Pritchard's use of web-based images to illustrate a visual method of analysis and Heracleous, Paroutis and Lockett's report of a turnaround strategy at the mobile phone company Nokia to illustrate understanding of enthymemes. In these articles, the methodological point is the substantive one and the empirical evidence is used to illustrate that point. These published articles now provide examples of how to focus a paper to make a methodological contribution before making a formal submission to *Methodology Matters*.

Introduction to the papers included here

The aspirations of *Methodology Matters* to capture the plurality of methodological approaches and ideas found across the readership of *EMR* and to encourage reflexivity around research practices are also found in the six papers that are included below. Two consider concepts and theory and four address different research methods of, respectively, participant-observation, experiments, visual research and surveys. The content of each, with suggestions of how subsequent submissions may add to our understanding, will be considered in turn.

Heracleous *et al.* (2020) discuss enthymemes. They highlight that enthymemes, although an integral component of the concept of rhetoric – which has quite widespread usage in the management disciplines – have so far been given insufficient consideration in rhetorical analysis. Moving away from approaches that analyse enthymemes from either an interpretivist or a positivist tradition, they propose instead a mixed methods approach; the strength of which is to facilitate both the nuanced understanding of local assumptions in the enthymeme and the extent of their wider applicability. They provide a protocol for implementing their mixed methods

approach and illustrate its application to a turnaround strategy at Nokia. Heracleous *et al.* make a number of suggestions for developing their analysis in the future. Their article helps to highlight that there are many ways to analyse text. There could be other ways of capturing both localized understandings and assessments of the extent to which meanings are shared more widely. Articles that offer ways of extending that agenda are welcome in *Methodology Matters*.

Accard's (2020) article considers theorizing in management research. He recognizes that many theories are non-indigenous in the sense that they originate from outside of the management disciplines. Some of these are general theories that have highly malleable concepts and – because of the way in which they challenge existing thinking in the management area – may be considered as radical travelling theories. Accard notes that there are few concrete guidelines for how to apply those radical travelling theories to management disciplines. The contribution of his article is, thus, to provide a method and an illustration of a way of applying radical travelling theories to the management area. The method involves tight mapping to reduce the levels of abstraction in the general theory to make clear the analogies that are being drawn between the radical travelling theory and its application in management. *Methodology Matters* would welcome articles that further enhanced our understanding of the application of theory by considering whether the framework suggested by Accard of indigenous theories, novel travelling theories and radical travelling theories is a valid and extensive one and what are the implications of each type of theory when seeking to collect empirical evidence? Other articles providing novel insights into the role of theory in the design, conduct and reporting of research are also encouraged.

Pass (2020) – a relatively early career researcher – used participant-observation in her PhD research. Emphasizing the relative absence of qualitative research studies and resultant lack of depth in understanding of phenomena in the management area and the dearth of literature providing insights into what it is really like to conduct participant-observation, Pass elaborates on her experience to provide a number of lessons about access, emotions, others' expectations in ethnographic research, note-taking, varieties of understanding, benefits of participant-observation and issues of publication opportunities. As noted above, Pass's article is that of a relatively early career researcher and as her article makes clear, the context is a workplace where tasks were often routine and mundane, even if the pace of work could be fast. Future submissions to *Methodology Matters* might add to our understanding of participant-observation if they reported on the experience of more senior researchers, or if they reported on what was encountered in an environment where the activities involved were less

routine. Contributions that add to our understanding of what constitutes and facilitates a research career in academe are also welcome.

Wulff and Villadsen (2020) examine the comparability of responses received from different types of experiment. Starting from the position that experiments provide a good way of investigating causal relationships, Wulff and Villadsen consider the usefulness of laboratory experiments and field experiments when investigating sensitive issues. They apply both types of experiment to the investigation of ethnic discrimination in job recruitment. Wulff and Villadsen acknowledge that there are weaknesses in both their application of the methods and in comparisons, but they offer indicative evidence of finding particular weaknesses in survey experiments. Future submissions to *Methodology Matters* could further enhance our understanding about the usefulness of experiments by greater stringency in the design to make findings from different types of experiment more comparable. Wulff and Villadsen provide some discussion of how that might be achieved. Our understanding of the usefulness of different forms of experiment in management research could also be enhanced by considering their benefits and disadvantages for collecting information from different types of groups of research participants - such as those who are defined as vulnerable - and by comparing different types of experiments with other methods.

Some authors have alluded to a potential visual turn in management research (for example, Bell and Davison, 2013), as visual methods have been seen as increasingly valuable in capturing visual dimensions of phenomena. However, while we know that those involved in management phenomena see things, the so-called visual turn demands that we have methods of analysis that allow systematic interpretation of what people are seeing. Yet there are few developed protocols to interpret, aggregate where appropriate and draw out patterns that may exist across different visual images used in the management of organizations. Pritchard's (2020) article outlines her combined visual analysis and the stages it involves to first identify the content and then draw out meaning from a particular type of pre-existing visual portrayal found in the management area, namely web images of people. Pritchard's article is linked to her research into human resource management. Understanding could be extended by examining whether her approach may be developed and extended to other areas of management. Pritchard's method is directed to pre-existing visual images found on the web. However, discussions of visual methods in *Methodology Matters* might be further enhanced by articles that focus on the usefulness of methods that analyse pre-existing organizational videos, visual aids used in presentations by managers, video recordings of television and film

dramas that portray different branches of management and research participants' photographic or video diaries.

Pielsticker and Hiebl (2020) note that surveys are the most common method used for empirical investigations into family business. Their paper conducts an analysis of 126 family business research surveys that were published in seven relevant journals to identify response rates to those surveys and the factors that influence those rates. Pielsticker and Hiebl conclude by suggesting other factors to explore for their potential influence on response rates in family business survey research. While these are a potential contribution for others to consider, one of the most significant signals from Pielsticker and Hiebl's research is that they included the *European Management Review* in their enquiry, yet none of the 126 family business research surveys that they report in their review, were published in *EMR*. Given the importance of family businesses to economies in Europe – one estimate is that such enterprises account for an average 40–50% of all jobs in the private sector in European countries (<http://www.europeanfamilybusinesses.eu/family-businesses/facts-figures>) – and the strength of the family business research strategic interest group (SIG) in this journal's parent organization, the *European Academy of Management (EURAM)*, this is an extremely worrying indicator. Thus, as part of the research agenda for *Methodology Matters* going forward, one area of future interest is a review of the state-of-the-art of research methods in family business research in Europe. In order not to disadvantage other strategic interest groups within *EURAM*, *Methodology Matters* will also welcome articles reviewing the state-of-the-art of research methods in the domain of any of the other SIGs. The section editor welcomes preliminary discussions with officers of SIGs around any proposals for such articles which – once written – will be subject to the normal double-blind review process of the journal.

Extending the methodological research agenda

The world in which management researchers reside is constantly changing which places demands for adaptation of how research is conducted. Some examples of such changes that have taken place since this section was launched are the introduction of the General Data Protection Regulation that affects the collection and storage of information and realignments in Europe that affect labour mobility and potential research collaborations. One principle on which the *Methodology Matters* section has always been based is to look beyond research methods as simple technical exercises, to include considerations of the ways in which the context shapes the conduct of research, so as to recognize that the facilitators of – and constraints on – research are topics worthy of

study *per se*. The issues covered in the original call are still of interest and the articles that have been published to date provide a foundation on which other authors may build when extending the ideas in the original call, but there are also other issues to consider. Thus, the section also welcomes articles that capture the way in which the conduct of research is affected by changes in the broader environment in which that research takes place.

It is of value to emphasize here that *EURAM* is a truly international community of scholars, drawing its constituency from people in many countries across Europe and beyond. In the publishing world, there is a lingua franca with a majority of journals only carrying articles written in the English language. One consequence of this is that academics in some European institutions have been expected to both teach and write in their second language (Boussebaa and Brown, 2017). In the past, *EMR* has tried experiments – without success – of accepting submissions in languages other than English and only publishing the final draft in English (Özbilgin, 2014). The lack of success of that initiative does not preclude an enduring necessity to seek to enhance our understanding by finding ways of looking at the world through different linguistic and cultural lenses. In promoting true internationalism, it is also important to recognize that a number of European countries enjoyed many advantages from imperialism in the past. Colonization has affected many of the assumptions that inform research, its design, its conduct and the methods that are employed. Many of these assumptions have been challenged by post-colonial theorists (Mir *et al.*, 2004; Jack and Westwood, 2009; Nkomo, 2011). *Methodology Matters'* encouragement of truly international research will be promoted by welcoming articles around all aspects of research design and practice that promote equality and culturally diverse understandings, including the following.

Language

Languages are important for a range of reasons. In addition to the English language providing the lingua franca of publication that affects opportunities for disseminating research findings, language influences the conduct of research in many other ways. There is a strong argument that language defines the limits to what may be perceived – with some languages not corresponding with others – and so our ideas are limited (Meriläinen *et al.*, 2008; Tayab, 1994). This has the potential to affect how research is designed, which is of interest to *Methodology Matters*. Language is also involved in the process of collecting, analysing and writing up evidence. With the growing internationalization of the academic labour force in management (e.g., AACSB, 2016), research often entails an academic working across

different languages. This inevitably results in a process of translation. Those in the positivist-realist camp often accept the idea of back translation involving initial translation into one language and then its translation back into the other language to see the consistency. By contrast, others who adopt a more interpretive epistemology recognize that the translator plays a role in how ideas appear once they are translated. As Xian (2008) reports, having worked previously as a translator, translation is ultimately a sense-making exercise by the translator. There are a number of methodological issues that arise from this which may provide interesting contributions to *Methodology Matters*. Is it best for an author whose first language is not the lingua franca of publication, to write up the research in the language in which it is going to be reported to an academic audience, or to write in his/her original language and then translate the research output? When interacting with research participants, is it better to speak with them in their first language, or their second or third language? Does it matter if some interviews are conducted in one language and others in another for the findings of international research? At what stage should translation take place with regards to processing evidence; before, during or after analysis? What should be translated from the evidence that is not collected in the lingua franca – all verbatim transcripts of text, all of the material that remains after analysis, or simply the key extracts that are going to be used when reporting evidence? What is lost and gained in adopting a different strategy for translation?

Origins and cultural aspects of research methods

There is evidence that our knowledge has been shaped by academics in particular countries (e.g., Locke, 1989; Kipping *et al.*, 2004; Mir *et al.*, 2004; Meyer, 2006). To broaden the scope of setting research agendas, *EMR* made a commitment to establishing a network to invite writers who are influential in setting the agenda in a particular country, but whose work has yet to be shared with an English-speaking audience (Lee *et al.*, 2019). It is just as likely that both the methods that we employ and our assumptions about the usefulness of the information gathered by those methods are shaped by particular cultures. Historical accounts of the development and genealogy of particular methods and their usefulness in different countries covered by the readership of *EMR* could provide interesting contributions for *Methodology Matters*. Similarly, with the advent of big data, what are the cultural dimensions that we need to take into account when analysing big data and have we already developed the tools and concepts – such as ethnostatistics (Gephart, 2006) – to demonstrate sensitivity to such cultural dimensions, or are there better ways of drawing out cultural nuances with such datasets?

International research and collaboration

There are often calls for international research and many funding bodies provide monies to facilitate such collaborations. Yet lessons from post-colonial thought remind us that other cultures and countries are not simply there as subjects for our research, to be represented and moulded according to our own theories. In the colonial past – and in its ongoing vestiges in academe (e.g., Kothiyal *et al.*, 2018) – there have been relationships of domination and subordination. These are not the only ways in which international research teams may be established. Europe is a continent in which relationships between its different countries may be less exploitative. *Methodology Matters* will welcome contributions about what constitutes ethically acceptable international research and what is the best way to constitute international collaborative networks to conduct that research in non-exploitative ways? Do the same arrangements in establishing such a network work as well across different continents as within a continent? This issue also extends to establishing relationships with potential participants in research. *EURAM* aspires to be a community of engaged scholars, generating useful knowledge for broader constituencies. Schumacher's (2018) article showed an effective way in which academics may work with managers. Yet organizations do not only affect managers, nor are they only affected by managers. Articles that consider how to engage actively and effectively with other stakeholders of organizations in one or more countries, either based on experiences across many projects, or specific insights from one project, are welcomed by *Methodology Matters*.

Conclusion

This editorial essay concludes by stating that *Methodology Matters* welcomes articles that build on the foundations of the debates that have appeared in this section to date and continues to welcome articles in its initial call as well as inviting contributions in the additional areas identified here. Thus, to summarize, based on adding the issues raised in the current discussion to those in the original call for papers, the different areas in which contributions are welcome include:

- novel applications of any method of data collection or analysis;
- critical reviews of a specific application of a method or approach particular to a stipulated intellectual, national or disciplinary context and reflections on the wider applicability of that method or approach;
- reflections of applicability and usefulness of any ontological, epistemological or methodological approach;

- insider, reflexive accounts on any of the challenges faced in the conduct of research, particularly those relating to international boundaries;
- critical appraisals of the criteria used for evaluating research in different traditions;
- interpretations of the mechanisms – such as journal lists, research quality audits, ethical regulatory boards – that are used to manage research at an institutional, national or international level;
- sharing of good or promising practices in management research methodology and the pursuit of engaged scholarship;
- commentaries upon the use of new technologies in the management research process;
- challenges to established methodological practices, both qualitative and quantitative;
- expressions of state-of-the-art of research methods in a particular sub-discipline of management covered by the *EURAM* and *EMR* constituency and suggestions for innovation and improvement in those areas;
- the methodological challenges faced in research when notable changes take place such as by the introduction of a far-reaching new technology, new data control regulations or international political realignments;
- methodological issues – in the broadest sense from conception to dissemination – involved in translation between languages when conducting research;
- origins of – and cultural influences on – different research methods and their usefulness; and
- ways of establishing international research teams in ethical ways that respect cultural differences and international diversity.

This list is not intended to be exhaustive and any article that addresses an appropriate methodological concern may be of interest.

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