REBECCA PIEKKARI[1] and CATHERINE WELCH[2]

Reflections on Using Qualitative Research Methods in International Business

ABSTRACT

This paper reflects upon our own research journey and raises a number of methodological questions we have been asking ourselves along the way. We focus on the challenges associated with interviewing corporate elites in international organisations and with conducting interview studies in multiple languages. Moreover, we discuss the advantages of the case study as a research strategy which at best is both theoretically sound and managerially relevant. In sharing our experiences of using qualitative research methods in international contexts we encourage researchers to show greater reflexivity towards their individual research processes, and in so doing open up possibilities for methodological innovation at the same time as improving research practice.

Key words: *qualitative interviewing, corporate elites, language, case studies*

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2 Catherine Welch will spend the year 2007 as a Research Fellow at Hanken (Swedish School of Economics and Business Administration).

REBECCA PIEKKARI, Professor

International Business, Helsinki School of Economics • e-mail: rebecca.piekkari@hse.fi

CATHERINE WELCH, Senior Lecturer

School of Organisation and Management, University of New South Wales • e-mail: c.welch@unsw.edu.au

1. INTRODUCTION

The focus of the present paper is on the research process and its influence on the production of scientific knowledge. We argue that increased awareness of how research findings are generated will ultimately lead to enhanced quality in research. There are often calls made for qualitative researchers to show greater reflexivity or sensitivity towards the ways in which the researcher "is part of the social world that is studied" (Alvesson 2003, p. 24; Hardy et al. 2001). This paper is therefore a response to those who have called for reflexive deliberations.

We will centre around three broad issues that emerged from our own research journeys: first, qualitative, personal interviewing with corporate elites in international organisations. Second, questions associated with interviewing that crosses language boundaries. Third, the use of case studies as a research strategy. This is because interviews and case studies are widely used in international business research (Welch et al. 2006). More specifically, we intend to discuss the following questions: Why is interviewing corporate elites any different from interviewing non-elites? What does interviewing in multiple languages imply? How does elite interviewing and language issues affect the research process? What are case studies? What skills do they require from the researcher? These were questions we posed as a consequence of our own research and the disciplinary context in which we operate, international business (IB).

2. INTERNATIONAL BUSINESS AS A RESEARCH CONTEXT

Our empirical examples are from the field of international business. Conducting research across national, cultural and linguistic boundaries often involves greater diversity, more complexity, higher levels of risk exposure and costs compared to research in a domestic context. But the challenges faced by individual researchers differ not only in degree but also in kind – they are qualitatively different from those found in purely domestic research settings. For example, issues associated with transcribing and translating data across languages may be completely invisible to an English-speaking researcher whose research process is monolingual from the beginning until the end, that is it takes place in English. Currently, much of the research in management and organisational studies involves international fieldwork. Therefore, we hope that the concerns we are raising will also appeal to scholars beyond the disciplinary boundaries of international business.

3. SOURCES OF REFLEXIVITY

We will adopt a reflexive approach to qualitative research practice and share with you many of our own experiences on this topic. Our views on qualitative research methods in international business have been shaped by several sources. The first source is our own fieldwork experiences. One of us has primarily conducted interviews and case studies in Finnish multinational corporations and their subsidiaries overseas. These include companies such as Kone Elevators, Nordea, Nokia, and UPM-Kymmene. The research context has generated insights into elite interviewing and the politics of large and complex organisations. Moreover, she has experienced the challenges associated with cross-language research when interviewing subsidiary managers and personnel in remote locations. The second author has primarily researched Australian exporters and project firms, ranging from 'micro firms' of less than five staff to a large, publicly listed conglomerate. Her PhD research combined extensive archival research with in-depth retrospective interviews, thus prompting her to look outside her discipline to other fields, notably history, where such methods are more common (Welch 2000). When we began comparing our field experiences, we were struck by the fact that we had both faced some common challenges, such as elite interviewing, that nevertheless had not been covered in the literature in our research area, or in the popular guides on methodology (e.g. Patton 1990; Yin 2003) which had been our diet as PhD students.

The second source for shaping our views on qualitative research methods is the academic community of which we are members. After all, Hardy, Phillips and Clegg (2001) remind us that reflexivity concerns not just the individual researcher, but also the wider research community. As active researchers, we receive feedback from our peers that shapes research outcomes and steers the choice of an appropriate outlet for our work. For example, at an international business workshop some years back we presented our first co-authored paper on methodology. One of the comments from the audience was that the paper dealt with an interesting topic but would be very hard to publish in an international business journal. Instead, we were advised to write a book on the topic! In the end, we managed to do both, that is have the article published (Welch et al. 2002) as well as edit a *Handbook of Qualitative Research Methods for International Business* (Marschan-Piekkari and Welch 2004). Yet, the journey has been long as the international game of publishing has become highly competitive, and papers that introduce new methodological insights or reflect on research practice do not fit the established mould of empirical reporting. Even worse, our interest has been in qualitative methodology, which has been marginalised in a field that is still heavily influenced by the assumptions and traditions of economics.

The third source of insight comes from our different academic roles within the IB community: 1) as editors and reviewers of colleagues' work, and 2) as authors trying to publish our own research. Moreover, we also 3) supervise doctoral and MSc thesis projects. As co-editors of a Handbook in the field (Marschan-Piekkari and Welch 2004) and a special issue of a journal on the same topic (Piekkari and Welch 2006) we have sought to encourage a debate on qualitative methodology. Although there has been an increase in the volume of publications, it seems that the range of qualitative research methods used in international business remains fairly narrow. Despite the rich, empirical phenomena that researchers in international business are interested in, there seems to be little methodological innovation in terms of how to capture them. Researchers in international business are much more comfortable writing about their findings than about the research process that has led to these findings.

In our role as authors, we try to actively publish our own work in peer reviewed journals. As happens to all of us, we often receive critical comments on the qualitative case studies we have conducted. For example, two reviewers wrote about the paper we had on interviewing corporate elites as follows: ″It can be doubted that elite interviewing is a basic problem in international business research. This assumption should be empirically supported by more than four studies in order to be valid.″ The second reviewer wrote as follows: ″Unfortunately, the current draft appears to develop a series of issues and recommendations based on four case examples.″ In hindsight, one can say that not only did this paper of ours employ a qualitative case study but it was also a methodological article. From this perspective, it probably represented ′double trouble′ for the reviewers.

As supervisors of doctoral theses, we reproduce the tradition of scholarly inquiry by emphasising to students the importance of making a theoretical contribution rather than aiming at a methodological contribution. Yet the field of international business, as many other fields in management and organisation studies, offers considerable potential for extending the boundaries of common research practice and using research methods in an innovative way. For example, a Norwegian doctoral student investigated the intended international strategy of her case company (Grøgaard 2006). She conducted a content analysis of company annual reports over a period of ten years. This source of data was then verified and extended in personal interviews with representatives from headquarters of the case company and its subsidiaries. Such an approach is seldom used in international business research, representing a distinctive methodological contribution.

These three sources – our own fieldwork, the established modes of knowledge production in our field and our various academic roles – have all influenced the way we view qualitative research methods and their use in international business. We shall now discuss the main questions that our own experiences have raised for us. We shall proceed with elite interviewing and the challenges associated with this type of fieldwork.

4. INTERVIEWING CORPORATE ELITES IS DIFFERENT

Consider first *who* is an elite in a business organisation. We would argue that in addition to top management, specialists and middle managers may occupy elite positions due to for example long tenure in the organisation, broad internal and external personal networks or functional responsibility (Welch et al. 2002). In an engineering and manufacturing-oriented company such as Kone Elevators factory managers had important positions within the firm although they were not high up in the formal organisational hierarchy. The motives for interviewing corporate elites may range from negotiating access to a research project to soliciting important information concerning company strategy and policies. Macdonald and Hellgren (2004) also add the need for researchers to gain legitimacy for their findings within the research community by demonstrating interaction with company top management. They discuss the implicit assumption that 'the more the researcher spends time interviewing top managers the better the quality of the study'. This should not be the case as the research questions should determine appropriate informants. In many situations the so called 'non-elites' are far better equipped to answer the interview questions than the top executives.

Interviewing corporate elites differs from non-elites in many ways. Generally, methodological texts portray the interview situation between the researcher and the non-elite informant as an exchange in which the researcher has control over the situation and steers the conversation with the interviewee. The interviewee, in turn, is an ordinary person in the street. In contrast, corporate elites are powerful persons who are used to speaking in public, defending their views and giving commands. It is not uncommon that elite interviewees start posing the researcher tricky questions about the findings or giving the researcher advice – without asking – how to best conduct the study at hand (Welch et al. 2002). For example, in one of our interviews, the top manager said: "I'm tempted to say that this conversation will be very short if we discuss the issue you suggest. Let me rephrase your question". And on he went finger-pointing with a smile on his face!

In today's business world, many elites are still male which introduces a gender difference for female researchers. Obviously, gender issues are likely to influence the interview dynamics depending on the topic. When we carried out personal interviews with top and middle managers or entrepreneurs on gender-related topics our own gender became an issue. Not surprisingly, it was explicitly referred to by several interviewees.

Moreover, elites are not just individuals but are members of an organisational hierarchy, with MNCs perhaps constituting one of the most complex hierarchies due to their sheer size and geographical dispersal. We and two co-authors, who had interviewed in a range of companies, both large and small, wondered on the effect of the organisational context for IB research. How is it possible for an individual researcher to understand the MNC, given that it is not a single organisation in a single location? In writing that 'Nokia decided' or 'CSR's strategy was successful', are we not guilty of over-simplification? In venturing into such an organisation, researchers may put themselves at risk, unwittingly becoming hostage to different organisational agendas and power struggles in the course of their fieldwork. In a co-authored chapter (Marschan-Piekkari et al. 2004), we argued that IB researchers need to consider this organisational context when designing and undertaking research, for example by triangulating across different units of the MNC.

Despite considerable collaboration between business schools and companies in Finland, the two worlds – the academic and the business world – remain apart. As an outsider, there is a need to understand and translate necessary professional jargon in order to be able to operate effectively as a researcher.

5. QUALITATIVE INTERVIEWING THAT CROSSES LANGUAGE BOUNDARIES

While elite interviews may involve translating between 'company speak' and professional jargon of the academic world, many of us (including the first author of this paper) face the additional challenge of interviewing in one language and reporting the research findings in another. It is not uncommon for researchers to conduct interviews in a language they are not comfortable with or to interview a person who has difficulties in answering the questions in a particular language. However, a field such as IB, which is English dominated, remains largely silent on these challenges. One of us reported her own experiences of interviewing across language boundaries in Marschan-Piekkari and Reis (2004). Additional complexities of interviewing across language boundaries were suggested to us by a comment made by one of the contributors to our *Handbook*. He related to us his experiences of being a Nordic researcher conducting interviews in the UK. He recalled that interviewees were able to 'take control' of the interview, given that they had the advantage over him of being native English speakers. He reflected that in some respects, it was easier if all the parties to the interview are non-native speakers of English.

In organisational research on multinational corporations, for example, one often assumes that since English is the common working language, research interviews can also be conducted in English. However, conducting research interviews in English does not automatically ensure trustworthy data in international organisations. In one of our studies we asked 34 fellow researchers to tell us how they deal with language issues in their qualitative interview projects (Welch and Piekkari 2006). For example, a Danish researcher, who had interviewed Chinese employees both in English and Chinese (Mandarin) gained much better insights when interviewing in Chinese. The quality of data in English was lower as the respondents only provided the researcher with known company policy expressed in company jargon rather than their personal views on the issues at hand. Moreover, there was also a language divide between top managers and lower level employees, with top managers being more comfortable using English.

In this study we also found that during the life cycle of a project, researchers make – consciously or unconsciously – a number of decisions concerning the choice of language. These range from deciding on access language, project language and interview language to reporting language (Welch and Piekkari 2006). For example, in which language is access to the company negotiated? What about when interacting with gate-keepers such as secretaries? Once access is granted, is the interviewee allowed to choose the interview language or is it the researcher who makes this decision? If no shared language is available, what are the implications of using an interpreter for the data collection and analysis? If the interview and the reporting languages differ, who translates the data and in which stage of the process is it done? These are questions that researchers, who speak minority languages of the academic community such as Finnish or Swedish, often confront. Yet, these issues tend to remain invisible in published research reports or PhD theses, or are only explained in passing, if dealt with at all.

Language use shapes the identity and power of the researcher alongside several other personal factors that affect the dynamics in the interview situation. For example, based on the findings of our study, language use is coupled with perceptions of foreigness. Perhaps contrary to expectations, being a foreigner and speaking a foreign language may be an advantage in a sense that interviewees are more open and willing to talk to somebody who is not part of their social and professional circles locally. In this sense, being an outsider from the academic world and a foreigner may jointly contribute to generating trustworthy and credible data (Welch and Piekkari 2006).

Given that ″qualitative research generates words″ and meaning (Marshall and Rossman 2006, p. 113), we would argue that language issues should not be treated as mere technical concerns. In research reports and alike, decisions concerning language use and choice in various stages of the research project should be made visible to the reader. Alongside the challenges associated with elite interviewing, language issues have broad implications for the accuracy and authenticity of data, for rapport-building between the researcher and the interviewee, and for the construction of shared meaning (Welch and Piekkari 2006).

6. THE USE OF CASE STUDIES IN INTERNATIONAL BUSINESS

Case studies often rely on multiple sources of data and forms of analysis although interviews are commonly used. They may successfully mix qualitative and quantitative elements in their designs. Case studies as a research strategy provide us with the opportunity to develop or test models and constructs which are both managerially relevant and theoretically sound. They often build on close and long-term research collaboration with companies and generate valuable contextual data. At the same time, the tentative theoretical framework is repeatedly examined against the data and relevant literature. As a research strategy, case studies also offer a suitable avenue for disseminating novel research findings to participating organisations. This is something that the funding institutions of research projects tend to appreciate.

Particularly in the Nordic countries, we have the competitive advantage in research to use the case approach for producing solid pieces of work. Companies, which are based in this part of the world, often welcome researchers to investigate real problems. Mutual trust and respect are the main ingredients of well-executed case studies. Managing delicate relationships with companies under study becomes a key skill of the case researcher. Gradually, such research collaboration generates insights and knowledge which could not have been gained otherwise, for example in a one-off survey or interview. The openness, trust and goodwill that many business practitioners show towards universities and business schools in the Nordic countries is something rather unique. It is a striking feature of our research climate compared to the situation encountered in other parts of Europe or let alone the broader Anglo-Saxon world.

In an on-gong project on case studies we explore the research practice of using case studies in international business (Welch et al. 2006). The purpose is to open up a debate on case studies which has largely been dominated by two authors, namely Kathleen Eisenhardt and Robert Yin. In this project, we compare how case studies are conceptualised in the methodological literature (i.e. how case studies *should* be conducted) with how they *are* applied in our field. A comprehensive review of major journals in international business is likely to reveal how case studies have been adopted and adapted to the particular context of field studies in international business. Moreover, we want to categorise different case study designs such as an ethnographic case study, a theory-building case study, a retrospective case study, a real-time case study etc. Our aim is also to identify 'best practice' in qualitative case study designs, Finally, we hope to encourage innovative, contextualised research that is managerially relevant as well as theoretically sound.

7. CONCLUDING REMARKS

In this paper, we have highlighted some of the challenges associated with interviewing corporate elites and interviewing across language boundaries. We have also emphasised the value of well-executed case studies.

We would like to re-emphasise the role and position of the researcher in the choice of methods and the overall process of generating knowledge. It is important to be aware – and make the reader aware – of our own backgrounds and personal orientations since they serve as the starting point of any research process. As researchers, one of our responsibilities is to specify clearly the cultural boundaries of our work (Michailova 2004).

To conclude, as researchers we have different skills and therefore it is worthwhile to consider what qualitative interviewing and case studies require from the researcher. Leonard-Barton (1990) notes in her article on case studies that when interviewing one needs to keep previous interviewee responses in mind while simultaneously interacting with the current informant. Moreover, one needs to be very aware of what is left unsaid as well as what is said. Scapens (2004) writes that case study research also requires excellent language skills in terms of communicating with interviewees and various groups of personnel. He describes his own role as a bridge-builder between production and marketing staff of the case company. Moreover, competence in foreign languages may be necessary. Analysis of data also requires a high tolerance for initial ambiguity, as one moves towards clarity. Finally, in case studies the researcher ends up spending almost as much time and effort on setting organisational expectations and on fostering and maintaining relationships with the case company as on the actual data collection. Qualitative case studies do not yield immediate results. They are labour-intensive and require continuous efforts over long periods of time. Therefore, one must really enjoy fieldwork.

In this paper, we have sought to show how our own fieldwork generated dilemmas and questions which we felt had not been voiced in the existing literature in our field. By seeking to write about these experiences in a systematic way, and to encourage others to do the same, we hope that we have been able to open up new possibilities for research in our field. Methodological innovation and reflexivity are, we would argue, important to any field – not just in terms of improving research practice, but also because they have a role to play in terms of new theoretical directions as well. ■

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