

Chapter 4

Understanding research philosophy and approaches to theory development

Learning outcomes

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

- define ontology, epistemology and axiology, and explain their relevance to business research;
- reflect on your own epistemological, ontological and axiological stance;
- understand 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 and articulate your own philosophical position in relation to your research;
- distinguish between deductive, inductive, and abductive approaches to theory development.

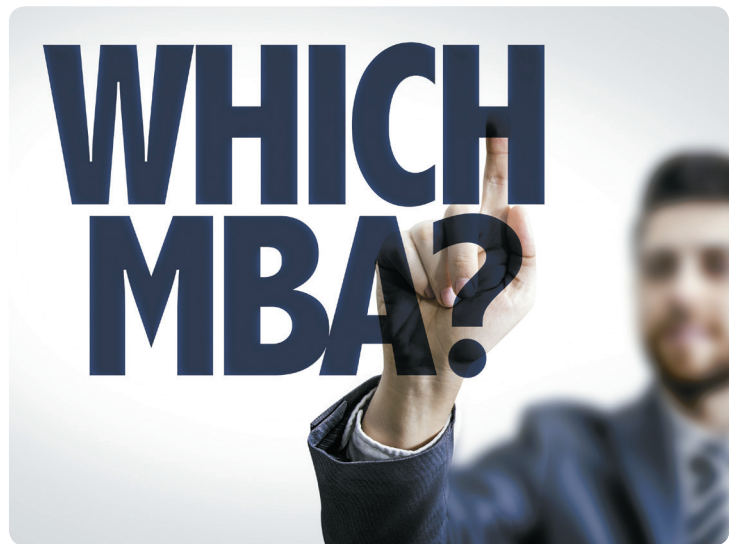
4.1 Introduction

Much of this book is concerned with the way in which you collect data to answer your research question(s). Most 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 techniques they use to collect them. You are not therefore unusual if early on in your research you consider whether you should, for example, use a questionnaire or undertake interviews. However, how you collect your data belongs in the centre of the research 'onion', the diagram we use to depict the issues underlying the choice of data collection techniques and analysis procedures in Figure 4.1. In coming to this central point you need to explain why you made the choice you did so that others can see that your research should be taken seriously (Crotty 1998). Consequently there are important outer layers of the onion that you need to understand and explain 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 and 4.3) and approach to theory development (Section 4.4). In Chapter 5 we examine the layers we call methodological choice, strategy and time horizon. The sixth layer (data collection and analysis) is dealt with in Chapters 7–13.

Our own beliefs and assumptions about what is important affected all of us in the decisions we made about what we wished to study and at which university, and the research we undertook in order to make that decision. Like us, every year hundreds of thousands of people each make the personal decision about what and where to study. Not only is the variety of possible undergraduate and master's programmes extremely diverse, ranging from the natural sciences to the arts and humanities, as well as including vocational subjects such as business and management, but there are also, potentially, thousands of universities to choose from.

Each individual applicant's personal decision about the programme they wish to study and at which university is based, at least in part, on what motivates them to study, the information they find useful in making decisions, alongside a wide variety of other influencing factors. Recent research undertaken for the Higher Education Funding Council England (Dye 2013; Mellors-Bourne et al. 2014) on the decisions made about taught master's degree programmes acknowledges that applicants are a diverse and complex group. Not surprisingly, the researchers conclude that these people approach their decision making in different ways. Drawing on their findings, they offer clear recommendations



about the nature of information prospective students require. They highlight how prospective students' information needs upon which they can base their decisions differ markedly across a variety of dimensions. These include whether or not prospective applicants are students continuing directly from an undergraduate degree or returning to study after a period in employment, and whether or not they are overseas or UK-based applicants.

Just as our beliefs and assumptions affected our decisions about what to study and at which university, they can also have an important impact on the research we decide to pursue and the methodology and methods we use.

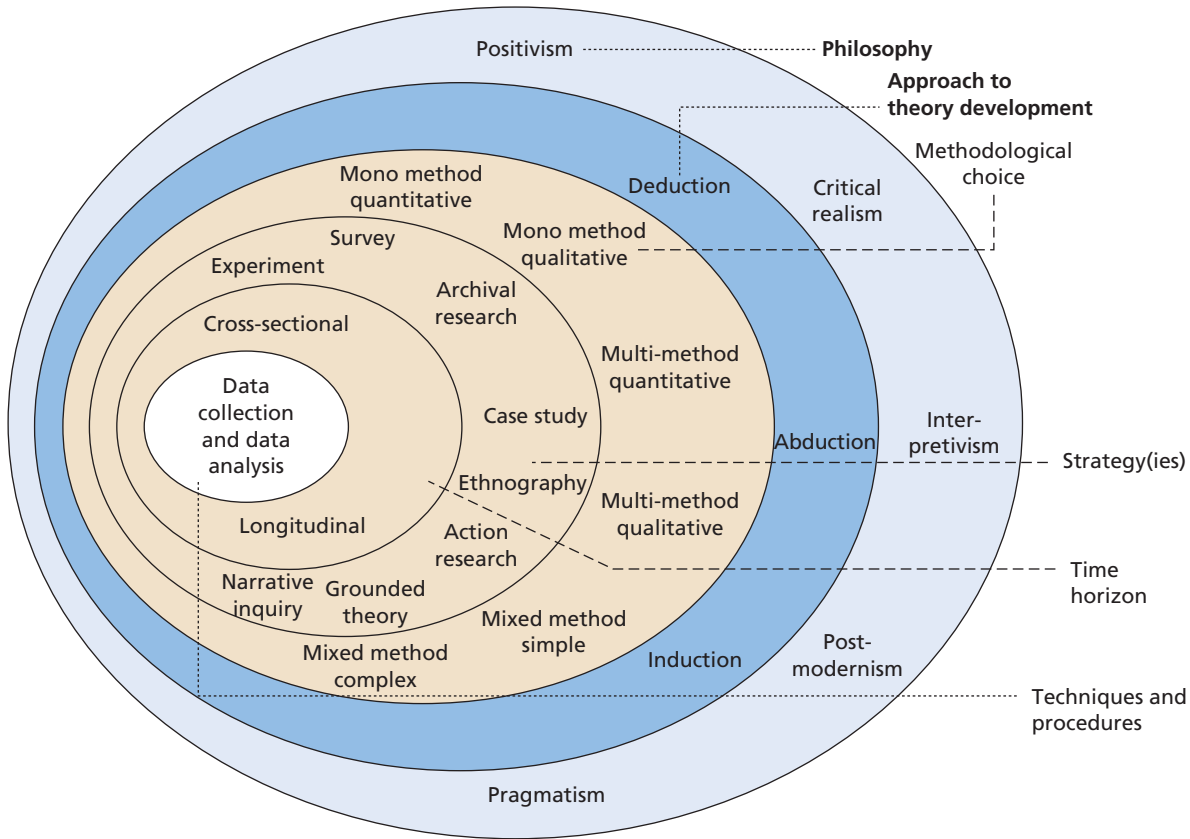


Figure 4.1 The research 'onion'

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4.2 The philosophical underpinnings of business and management

What is research philosophy?

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 answering a specific problem in a particular organisation you are, nonetheless, developing new knowledge.

Whether you are consciously aware of them or not, at every stage in your research you will make a number of types of assumption (Burrell and Morgan 1979). These include assumptions about human knowledge (epistemological assumptions), about the realities you encounter in your research (ontological assumptions) and 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 philosophy, which will

underpin your methodological choice, research strategy and data collection techniques and analysis procedures. 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.

Prior to undertaking a research methods module, few of our students have thought about their own beliefs about the nature of the world around them, what constitutes acceptable and desirable knowledge, or the extent to which they believe it necessary to remain detached from their research data. The process of exploring and understanding your own research philosophy requires you to hone the skill of reflexivity, 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 (Gouldner 1970). 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 your reflexivity, to become aware of and actively shape the relationship between your philosophical position and how you undertake your research (Alvesson and Sköldbberg 2000).

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 the time and finances available for your research project, and the access you can negotiate to data. However, 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;
- familiarise yourself with major research philosophies within business and management.

This section introduces you to the philosophical underpinnings of business and management, and Section 4.3 to the five research philosophies most commonly adopted by its researchers. We will encourage you to reflect on your own beliefs and assumptions in relation to these five philosophies and the research design you will use to undertake your research (Figure 4.2). The chapter will also help you to outline your philosophical choices and justify them in relation to the alternatives you could have adopted (Johnson and Clark 2006). Through this you will be better equipped to explain and justify your methodological choice, research strategy and data collection procedures and analysis techniques.

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 to help you think about your values and beliefs in relation to research. 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 the five major philosophies used in business and management research.

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

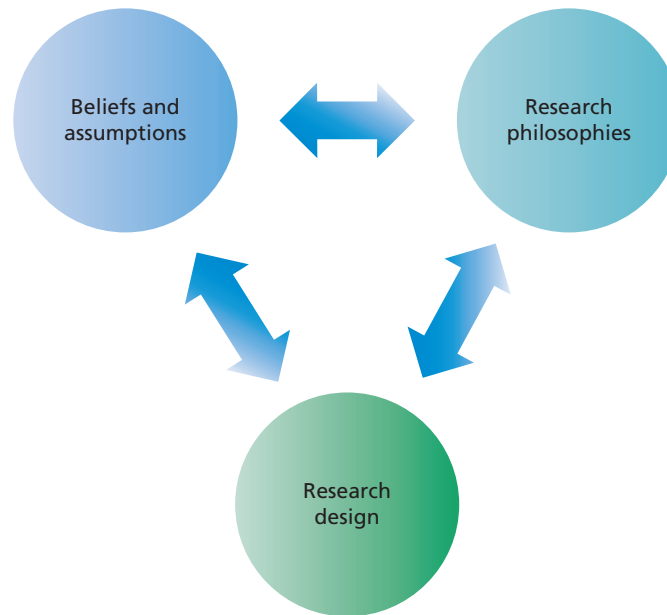


Figure 4.2 Developing your research philosophy: a reflexive process

Source: © Alexandra Bristow and Mark Saunders 2015

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, resulting in the coexistence of multiple research philosophies, paradigms and approaches 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 it from becoming more like a true scientific discipline. They advocate unification of management research under one strong research philosophy, paradigm and methodology. Pluralists see the diversity of the field as helpful, arguing it enriches business and management (Knudsen 2003).

In this chapter, we take a pluralist approach and suggest that each research philosophy and paradigm contributes something unique and valuable to business and management research, representing a different and distinctive ‘way of seeing’ organisational realities (Morgan 1986). 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.

Ontological, epistemological and axiological assumptions

Before we discuss individual research philosophies in Section 4.3, we need to be able to distinguish between them. We do this by considering the differences in the assumptions each makes. We look at three types of research assumptions to distinguish research philosophies: ontology, epistemology and axiology.

Ontology refers to assumptions about the nature of reality. Although this may seem abstract and 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 the management actions that could prevent or stop resistance. More recently, some researchers have started to view the concept of resistance to change 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 that 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 concerns assumptions about knowledge, what constitutes acceptable, valid and legitimate knowledge, and how we can communicate knowledge to others (Burrell and Morgan 1979). 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, from facts to interpretations, and including narratives, stories and even fictional accounts – 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 fictional literature (De Cock and Land 2006).

This variety of acceptable epistemologies gives you a much greater choice of methods than you would have in many other academic disciplines. 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 best scientific evidence is likely 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 that will govern what you consider legitimate for your research.

Axiology refers to the role of values and ethics within the research process. This incorporates questions about how we, as researchers, deal with both our own values and those of our research participants. As we saw in the opening vignette, the role that your own values play in all stages of the research process is of great importance if research results are to be credible. Heron (1996) argues that our values are the guiding reason for all human action. He further argues that researchers demonstrate axiological skill by being able to articulate their values as a basis for making judgements about what research they are conducting and how they go about doing it. Choosing one topic rather than another suggests that you think one of the topics is more important. Your choice of philosophy is a reflection of your values, as is your choice of data collection techniques. For example, conducting a study where you place great importance on data collected through interview work suggests that you value personal interaction with your respondents more highly than their views expressed through an anonymous questionnaire.

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).

Objectivism and subjectivism

Now you are familiar with the 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 that 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 three types of philosophical assumption that we have just discussed.

Objectivism incorporates the assumptions of the natural sciences, arguing that the social reality that 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, 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 into which individuals are born (Burrell and Morgan 1979).

From an objectivist view point, social and physical phenomena exist independently, being 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 seek to keep their research free of values, which they believe

Table 4.1 Philosophical assumptions as a multidimensional set of continua

| Assumption type | Questions | Continua with two sets of extremes | | |
|---------------------|---|--|---|--|
| | | Objectivism | ↔ | Subjectivism |
| Ontology | <ul style="list-style-type: none"> • What is the nature of reality? • What is the world like? • For example: <ul style="list-style-type: none"> – What are organisations like? – What is it like being in organisations? – What is it like being a manager or being managed? | Real | ↔ | Nominal/decided by convention |
| | | External | ↔ | Socially constructed |
| | | One true reality (universalism) | ↔ | Multiple realities (relativism) |
| | | Granular (things) | ↔ | Flowing (processes) |
| | | Order | ↔ | Chaos |
| | | | | |
| Epistemology | <ul style="list-style-type: none"> • How can we know what we know? • What is considered acceptable knowledge? • What constitutes good-quality data? • What kinds of contribution to knowledge can be made? | Adopt assumptions of the natural scientist | ↔ | Adopt the assumptions of the arts and humanities |
| | | Facts | ↔ | Opinions |
| | | Numbers | ↔ | Narratives |
| | | Observable phenomena | ↔ | Attributed meanings |
| | | Law-like generalisations | ↔ | Individuals and contexts, specifics |
| Axiology | <ul style="list-style-type: none"> • What is the role of values in research? How should we treat our own values when we do research? • How should we deal with the values of research participants? | Value-free | ↔ | Value-bound |
| | | Detachment | ↔ | Integral and reflexive |

could bias their findings. They therefore also try to remain detached from their own values and beliefs throughout the research process.

The social phenomenon of management can be researched in an objectivist way (Box 4.1). 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. 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. 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.



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 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 inhabit 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.

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 very much more akin to the subjectivist view.

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 1979). A less extreme version of this is **social constructionism**, which puts forward that reality is constructed through social interaction in which social actors create partially shared meanings and realities.

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 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 use 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 customer motives and behaviour. Customers, like other social actors, may interpret the situations in which they find themselves differently as a consequence of their own view of the world. Their different interpretations

are likely to affect their actions and the nature of their social interaction with others. From a subjectivist view, the customers you are studying both interact with their environment and seek to make sense of it through their interpretation of events and the meanings that they draw from these events. Consequently their actions may be seen by others as being meaningful in the context of these socially constructed interpretations and meanings.

As a subjectivist researcher, it is your role to seek to understand the different realities of the customers in order to be able to make sense of and understand their motives, actions and intentions in a way that is meaningful (Box 4.2). All this is some way from the objectivist position that customer service in an organisation has a reality that is separate from the customers who perceive that reality. The subjectivist view is that customer service is produced through the social interactions between service providers and customers and is continually being revised as a result of this. In other words, at no



Box 4.2 Focus on research in the news

Glastonbury Festival, Worthy Farm, Somerset – review

By Ludovic Hunter-Tilney

“Welcome to Glaston-mud,” announced the bus driver on the way from the train station to the festival. “A few days ago we were getting sunburnt.” At least the humour is always dry in the West Country. But in the event the rain that swept over Glastonbury when its stages opened on Friday turned out not to be too bad. The mud was bearable. Passages of sunshine provided respite. The real threat of a damp squib lay elsewhere.

On paper the three-day line up didn’t lack star power. In Lana Del Rey and Ed Sheeran it had the current holders of the number one album in the US and the UK respectively.

Elsewhere was the usual amazing profusion of acts, hundreds of them. On the main Pyramid Stage, Robert Plant looked over the tens of thousands of people in front of him and recalled how, many riffs ago, Led Zeppelin played the 1970 Bath Festival of Blues and Progressive Music, Glastonbury’s forerunner. “Quite a trip,” the relic sighed.

The variety was immense, from queen of country Dolly Parton to fratboy favourite DJ Skrillex. Yet a crucial element was missing: the “wow” factor, as provided by the Rolling Stones last year and Beyoncé in 2011. Prince would have fitted the bill, but the festival fumbled negotiations with him to appear: according

to festival organiser Michael Eavis, the publicity shy singer pulled out when news of the possible booking leaked. So instead we got two headliners drawn from Glastonbury’s indie-rock comfort zone – Arcade Fire on the first night, Kasabian on the last – flanking an oddity: Metallica, the first heavy metal headliner in the festival’s history. That was a curveball, true – but more “really?” than “wow!”.

The stage was thus set for Saturday’s headliners, Metallica. An introductory film showed the thrash metal veterans shooting fox hunters, a comic peace offering to critics who felt that singer James Hetfield’s enthusiasm for slaughtering big game was somehow contrary to the Glastonbury spirit. Their set was equally eager to please, a powerful and focused tour through their biggest hits.

A conceptual leap was required to link Hetfield in Glasto hippy mode (“Hands up all those who want to make the world a better place”) with the bulging-veined roarer of songs such as “Cyanide” and “Creeping Death”, but the band’s bulldozing force won out, sending revellers off into the night chanting the pulverising riff from “Seek & Destroy”. Only the absence of new material led one to suspect that Glastonbury’s first heavy metal headliner would have been even more remarkable 30 years ago when they were in their pomp.



Source: Abridged from ‘Glastonbury festival, Worthy Farm, Somerset. Review’, Ludovic Hunter-Tilney (2014) *ft.com*, 29 June. Copyright © 2014 The Financial Times Ltd

time is there a definitive entity called ‘customer service’. Different versions of customer service are experienced by different individuals, and as an aggregate it is constantly changing.

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. Like the objectivism–subjectivism dimension, this ideological dimension has two opposing poles or extremes. Burrell and Morgan (1979) call these extremes ‘sociology of regulation’ (for short, regulation) and ‘sociology of radical change’ (simply, 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. 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 (Box 4.3). Such research is often visionary and utopian, being concerned with what is possible and alternatives to the accepted current position (Burrell and Morgan 1979). Table 4.2 summarises the differences between the regulation and radical change perspectives.

In their book *Sociological Paradigms and Organisational Analysis* (1979) 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) 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,

Table 4.2 The regulation–radical change dimension

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

Source: developed from Burrell and Morgan (1979)

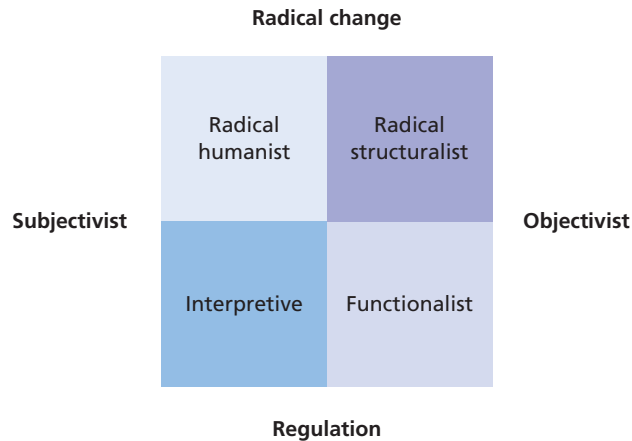


Figure 4.3 Four paradigms for organisational analysis

Source: Developed from Burrell and Morgan (1982) *Social Paradigms and Organisational Analysis*.
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Box 4.3 Focus on management research

Critical Management Studies: questioning management

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 aims to challenge their taken-for-granted acceptance as 'the best' or 'the only available' ways of organising societies (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.

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: 1–2) challenges the acceptance of management.

Parker starts by acknowledging just how difficult and almost unthinkable is it 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, does the environment benefit from being controlled by people? Alternatively, is controlling employees necessarily good for organisations?

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 could include an evaluation study of a communication strategy to assess its effectiveness and to make recommendations for improvement. Research carried out within the functionalist paradigm is most likely to be underpinned by the positivist research philosophy (Section 4.3), this type of research often being referred to as 'positivist-functionalist'.

The bottom left corner of the matrix represents the **interpretive paradigm**. As with the research philosophy of the same name (interpretivism, Section 4.3), 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 irrationalities. Concern with studying an organisation's communication strategy may focus on understanding the ways in which it fails due to unseen 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).



Box 4.4 Focus on student research

Researching the emotional effect 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 details of situations. She considered that these researchers often ignored the individualistic and subjective aspects of contracts as well as individuals' emotional responses. Robyn therefore decided her research would be concerned with the emotional effect that employers' psychological contract violation had on employees, and how these emotions impacted upon their attitudes and behaviours. Based on a thorough review of the literature she developed three objectives:

- to establish how individuals decided their psychological contracts were being violated and their emotions in response to this violation;
- to ascertain the extent to which individuals' attitudes towards their employer changed as a result of these emotions;
- to explore attitudinal and behavioural consequences of this violation.

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.

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 is often underpinned by a critical realist philosophy (Section 4.3), 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 its political nature 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 (1979) 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'. 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 4.3) 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. The connections between paradigms and research philosophies therefore need to be seen in terms of philosophical affinity rather than equivocality, and should be treated with some caution and reflexivity. You will find such reflexivity easier as you become familiar with individual research philosophies.

4.3 Five major philosophies

In this section, we discuss five major philosophies in business and management: positivism, critical realism, interpretivism, postmodernism and pragmatism (Figure 4.1).

Positivism

We introduced the research philosophy of positivism briefly in the 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 human interpretation or bias (Table 4.3). Today there is a 'bewildering array of positivisms', some counting as many as 12 varieties (Crotty 1998).

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 regularities, 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 (Gill and Johnson 2010). You would use these universal rules and laws to help you to explain and predict behaviour and events in organisations.

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 | Scientific method | Value-free research | Typically deductive, highly structured, large samples, measurement, typically quantitative methods of analysis, but a range of data can be analysed |
| One true reality (universalism) | Observable and measurable facts | Researcher is detached, neutral and independent of what is researched | |
| Granular (things) | Law-like generalisations | Researcher maintains objective stance | |
| Ordered | Numbers | | |
| | Causal explanation and prediction as contribution | | |
| Critical realism | | | |
| Stratified/layered (the empirical, the actual and the real) | Epistemological relativism | Value-laden research | Retroductive, in-depth historically situated analysis of pre-existing structures and emerging agency. Range of methods and data types to fit subject matter |
| External, independent | Knowledge historically situated and transient | Researcher acknowledges bias by world views, cultural experience and upbringing | |
| Intransient | Facts are social constructions | Researcher tries to minimise bias and errors | |
| Objective structures | Historical causal explanation as contribution | Researcher is as objective as possible | |
| Causal mechanisms | | | |
| Interpretivism | | | |
| Complex, rich | Theories and concepts too simplistic | Value-bound research | Typically inductive. Small samples, in-depth investigations, qualitative methods of analysis, but a range of data can be interpreted |
| Socially constructed through culture and language | Focus on narratives, stories, perceptions and interpretations | Researchers are part of what is researched, subjective | |
| Multiple meanings, interpretations, realities | New understandings and worldviews as contribution | Researcher interpretations key to contribution | |
| Flux of processes, experiences, practices | | Researcher reflexive | |

| Ontology (nature of reality or being) | Epistemology (what constitutes acceptable knowledge) | Axiology (role of values) | Typical methods |
|---|---|---|--|
| 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 |
| 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 |

As a positivist researcher you might use existing theory to develop hypotheses. These hypotheses would 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. 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 also try to remain neutral and detached from your research and data in order to avoid influencing your findings (Crotty 1998). 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 Internet questionnaire (Chapter 11) in which the respondent self-selects from responses predetermined by the researcher, and in-depth interviews (Chapter 10). In the Internet questionnaire, the researcher determines the list of possible responses as part of the design process. Subsequent to this she or he



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 for software developers. 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 software developers. 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 and telecommunications equipment will negate the productivity gains from home working.
- 2 Home workers will require additional support from on-site employees, for example technicians, which will negate the productivity gains from home working.
- 3 Work displaced to other employees and/or 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.

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 her or his judgement in what to ask to collect participant-led accounts that are as rich as possible.

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 that the decision to try to adopt a value-free perspective suggests the existence of a certain value position!

Positivist researchers are likely to use a highly structured methodology in order to facilitate replication (Gill and Johnson 2010). 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.

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 or rugby 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 what we see are 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 known as 'retroduction') (Reed 2005). Direct realism says that the first step is enough. To pursue our cricket (or rugby) 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 4.4). 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 4.4). 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 his/her sensory data of the 'Empirical' as observed and use reasoning to work it out.

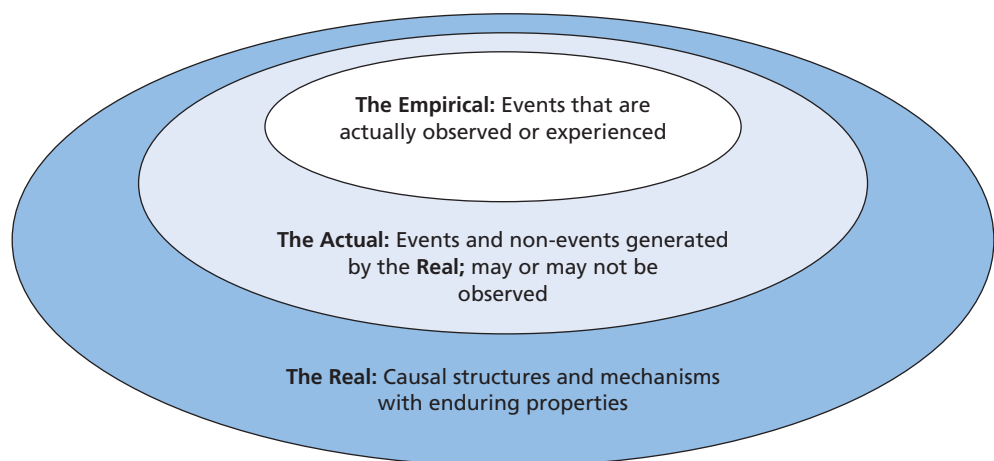


Figure 4.4 Critical realist stratified ontology

Source: Developed from Bhaskar (1978)

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 (1989) 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 1989). This implies that critical realist notions of causality cannot be reduced to statistical correlations and quantitative methods, and that 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 rugby 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). Interpretivism argues 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 that 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, for example, that the ways in which the CEO, board directors, managers, shop assistants, cleaners and customers see and experience a large retail company are different, so much so that they could arguably be seen as experiencing 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 contained to different organisational roles. Male or female employees or customers, or those from different ethnic/cultural backgrounds, may experience workplaces, services or events in different ways. Interpretations of what on the surface appears to be the same thing (such as a luxury product) 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. Different strands of interpretivism place slightly different emphasis on how to do this in practice, so **phenomenologists**, who study existence, focus on participants' lived experience; that is, the participants' recollections and interpretations of those experiences. **Hermeneuticists** focus on the study of cultural artefacts such as texts, symbols, stories, 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, 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 that the researcher has to adopt 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.

Postmodernism

Postmodernism 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 for the sake of simplicity 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 1991). This does not mean that 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 1997). 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 1976). 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 post-modern 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. For example, you might wish to follow the work of Barbara Townley (1994), and explore the ways in which the label 'human resources' (HR) privileges particular ways of seeing and dealing with human beings in organisations and show what other alternatives it suppresses. You might explore how the HR label makes acceptable and legitimate a whole range of ideas and practices that we know as 'human resource management', thus serving the interests of managers rather than those of their subordinates (Townley 1994).

As a postmodernist, 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 phenomena. Fundamental to postmodernist research is the recognition that power relations between the researcher and research 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 1997), 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 4.6). 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 re-creates 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 theme which recurs in this book – that multiple methods are



Box 4.6 Focus on management research

Investigating the realities of how things work in organisations

In an article in the *Journal of Management Studies*, Watson (2011) discusses the rationale for undertaking good ethnographic research when investigating the realities of how things work in organisations. Within this he argues that pragmatist realist principles of truth, reality and relevance to practice provide a powerful rationale for focusing on investigating the

realities of how things work in organisations using ethnography.

In his article Watson highlights how he has always believed that it is not possible to learn a great deal about what actually happens or how things work in organisations without undertaking intensive research that involves observation or the researcher participating, both of which are essential to ethnography. In developing this argument, Watson (2011: 204) emphasises the importance of the ‘relevance to practice’ principle of pragmatism, stating: ‘I felt that there was no real alternative to this if I wanted to contribute in a worthwhile way to the social scientific understanding of how managers manage, how organisational change comes about, how micro politics operate, and how employment relationships are shaped and maintained.’

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).

4.4 Approaches to theory development

We emphasised that your research project 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 you are clear about the theory at the beginning of your research raises an important question concerning the design of your research project. This is often portrayed as two contrasting approaches to the reasoning you adopt: deductive or inductive. Deductive reasoning occurs when the conclusion is derived logically from a set of premises, the conclusion being true when all the premises are true (Ketokivi and Mantere 2010). For example, our research may concern likely online retail sales of a soon-to-be-launched new games console. We form three premises:

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

If these premises are true we can deduce that the conclusion that online retailers will have 'sold' their entire allocation of the new games consoles 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 example of the likely online retail sales of a soon-to-be-launched new games console, we would start with observations about the forthcoming launch. Our observed premises would be:

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

Based on these observations, we have good reason to believe online retailers will have 'sold' their entire allocation of the new games consoles by the release day. However, although our conclusion is supported by our observations, it is not guaranteed. In the past, manufacturers have launched new games consoles which have been commercial failures (Zigterman 2013).

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 was 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 online retail sales of a soon-to-be-launched new games console, a surprising fact (conclusion) might be that online retailers are reported in the news media as stating they will have no remaining stock of the new games console for sale on the day of its release. However, if the online retailers are allowing customers to pre-order the console prior to its release then it would not be surprising if these retailers had already sold their allocation of consoles. Therefore, using abductive reasoning, the possibility that online 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 which you subsequently test through additional data collection, you are using an **abductive approach** (Table 4.4).

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

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 |

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 research approach in the natural sciences, where laws present the basis of explanation, allow the anticipation of phenomena, predict their occurrence and therefore permit them to be controlled.

Blaikie (2010) lists six 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 you wish to establish the reasons for 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 that absenteeism is significantly more likely to be prevalent among younger workers and another which states that 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 this proposition you collect quantitative data. (This is not to say that a deductive approach may not use qualitative data.) It may be that 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 in which people were managed. Your research would use a highly **structured methodology** to facilitate replication, an important issue to ensure reliability, as we shall emphasise in Section 5.8.

An additional important characteristic of deduction is that concepts need to be **operationalised** in a way that enables facts to be measured, often quantitatively. In our example, one variable that needs 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 **reductionism** is being followed. This holds

that 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 5.8.

Induction

An alternative approach to developing theory on retail store employee absenteeism would be to start by interviewing a sample of the employees and their supervisors 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 the problem. 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 a person 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 worker age or length of service. You may end up with the same theory, but your reasoning to produce that theory is using 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 argue that it is more realistic to treat workers as humans whose attendance behaviour is a consequence of the way in which they perceive their work experience, rather than as if they were unthinking research objects who respond in a mechanistic way to certain circumstances.

Followers of induction would also criticise deduction because of its 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. Alternative theories may be suggested by deduction. However, 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 above is that of 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 stricter definition of age.

Research using an inductive approach to reasoning is likely to be particularly concerned with the context in which such events take place (Box 4.7). 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).



Box 4.7 Focus on management research

Developing theory inductively

In their paper titled 'Sustainable entrepreneurship, is entrepreneurial will enough?' Spence et al. (2011) analyse 44 cases from Canada, Tunisia and Cameroon to determine the fundamentals of sustainable entrepreneurship in small- and medium-sized enterprises (SMEs). The overall objective of their research was to analyse and explain SMEs' practices by comparing and contrasting levels of sustainable entrepreneurship in these three countries. They argue that, because the concept of sustainable

entrepreneurship was not well defined among SMEs in emerging and developing countries, an inductive approach would be most appropriate.

Data were collected using interviews, organisational documents provided by the owner-manager and by examining the SMEs' websites where available. Interviews lasted between one and two hours and were undertaken using a guide comprising of open questions designed to enable an understanding of each SME's level of sustainable entrepreneurship, as well as their business objectives. The questions allowed the interviewer to pursue topics such as the owner-manager's knowledge of sustainability issues, their personal beliefs and a detailed account of their firm's involvement in sustainability.

These data were used subsequently to induce qualitative indicators and develop a typology of sustainable development.

Abduction

Instead of moving from theory to data (as in deduction) or data to theory (as in induction), an abductive approach moves back and forth, in effect combining deduction and induction (Suddaby 2006). This, as we have noted earlier, matches what many business and management researchers actually do. Abduction begins with the observation of a 'surprising 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 uncover more 'surprising facts'. These surprises, 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.

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 building up a theory of employee absenteeism in a retail store. This we would test using evidence provided by existing data and new data and revise as necessary.

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 techniques by which data are collected and procedures 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 choice 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.

Using approaches in combination

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, is it 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 depends on the emphasis of the research (Box 4.8) and the nature of the research topic. 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, have to 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 fear that no useful data patterns and theory will emerge. Finally, there is the question of audience. In our experience, most managers are familiar with deduction and much 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.

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



Box 4.8 Focus on student research

Deductive, inductive and abductive research

Sadie decided to conduct a research project on violence at work and its effects on the stress levels of staff. 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 some 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 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 interview. She might then have used this model to develop a series of hypotheses and designed a questionnaire to collect data 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 were used at different stages). No approach should be thought of as better than the others. They are better at different things. It depends where her research emphasis lies.

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: it is important that your preferences do not lead to you changing the essence of the research question, particularly if it has been given to you by an organisation as a consultancy project.

4.5 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.
- 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 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 communicate knowledge to fellow human beings. Epistemological assumptions you make determines 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 the 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 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.
- Management and business research comprises five main 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, 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.

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 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 which philosophical perspective do you think this article is written? Use Section 4.2 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 or deductive? 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 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. 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.

Your views on the nature of reality (ontology)

| | Strongly Agree | Agree | Slightly Agree | Slightly Disagree | Disagree | Strongly Disagree |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 Organisations are real, just like physical objects. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 Events in organisations are caused by deeper, underlying mechanisms. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 The social world we inhabit is a world of multiple meanings, interpretations and realities. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 'Organisation' is not a solid and static thing but a flux of collective processes and practices. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 'Real' aspects of organisations are those that impact on organisational practices. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Your views on knowledge and what constitutes acceptable knowledge (epistemology)

| | Strongly Agree | Agree | Slightly Agree | Slightly Disagree | Disagree | Strongly Disagree |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 6 Organisational research should provide scientific, objective, accurate and valid explanations of how the organisational world really works. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 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. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 Concepts and theories are too simplistic to capture the full richness of the world. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Progressing your research project (continued)

Heightening your Awareness of your Research Philosophy (HARP)

| HARP Statements | | Strongly Agree | Agree | Slightly Agree | Slightly Disagree | Disagree | Strongly Disagree |
|---|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Please indicate your agreement or disagreement with the statements below. There are no wrong answers. | | | | | | | |
| 9 | What generally counts as 'real', 'true' and 'valid' is determined by politically dominant points of view. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Acceptable knowledge is that which enables things to be done successfully. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Your views on the role of values in research (axiology) | | | | | | | |
| 11 | Researchers' values and beliefs must be excluded from the research. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Researchers must try to be as objective and realistic as they can. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Researchers' values and beliefs are key to their interpretations of the social world. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Researchers should openly and critically discuss their own values and beliefs. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Research shapes and is shaped by what the researcher believes and doubts. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Your views on the purpose of research | | | | | | | |
| 16 | The purpose of research is to discover facts and regularities, and predict future events. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | The purpose of organisational research is to offer an explanation of how and why organisations and societies are structured. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | The purpose of research is to create new understandings that allow people to see the world in new ways. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | The purpose of research is to examine and question the power relations that sustain conventional thinking and practices. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 | The purpose of research is to solve problems and improve future practice. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Your views on what constitutes meaningful data | | | | | | | |
| 21 | Things that cannot be measured have no meaning for the purposes of research. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 22 | Organisational theories and findings should be evaluated in terms of their explanatory power of the causes of organisational behaviour. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



| HARP Statements | | Strongly Agree | Agree | Slightly Agree | Slightly Disagree | Disagree | Strongly Disagree |
|---|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Please indicate your agreement or disagreement with the statements below. There are no wrong answers. | | | | | | | |
| 23 | To be meaningful, research must include participants' own interpretations of their experiences, as well as researchers' interpretations. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 24 | Absences and silences in the world around us are at least as important as what is prominent and obvious. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 25 | Meaning emerges out of our practical, experimental and critical engagement with the world. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Your views on the nature of structure and agency | | | | | | | |
| 26 | Human behaviour is determined by natural forces. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 27 | People's choices and actions are always limited by the social norms, rules and traditions in which they are located. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 28 | Individuals' meaning-making is always specific to their experiences, culture and history. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 29 | Structure, order and form are human constructions. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 30 | People can use routines and customs creatively to instigate innovation and change. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Now please complete the scoring key below.

Your answer scores

Give yourself the points as indicated above 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 |





Progressing your research project (*continued*)

Heightening your Awareness of your Research Philosophy (HARP)

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 | | | | | | | |

Poststructuralism/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 | | | | | | | |

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. (1979) *Sociological Paradigms and Organisational Analysis*. London: Heinemann. This is an excellent 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 which 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 theoretical perspectives not covered in this chapter, including postmodernism, feminism and queer theory.

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.

Tsoukas, H. and Knudsen, C. (2003) *The Oxford Handbook of Organization Theory: Meta-Theoretical Perspectives*. Oxford: Oxford University Press. This book has in-depth chapters on positivism, interpretivism and postmodernism. It also has a chapter about pluralism in the field of management.

Case 4 Chinese tourists and their duty-free shopping in Guam



It was a Saturday night and Francisca was sitting at her desk. The house was quiet, and all her house-mates were out. Francisca decided to stay in, as she told herself that she really needed to get this done. What has been troubling her is quite a common issue for any student: her research philosophy.

Francisca knew the idea of her research project all along, thanks to her friends back home in Guam – a United States of America (USA)-owned island located in the western Pacific Ocean with a population of approximately 160,000; and where tourism is the largest contributor to the local economy. One of Francisca's friends worked for a duty-free shopping retailer, operating in a number of airports

across the world. During one conversation, Francisca's friend had mentioned that, although most tourists in Guam are from Japan and South Korea, this duty-free retailer had decided to target Chinese tourists as one of its main customer segments. She had commented that new flight routes between China and Guam were believed to bring about 14,000 Chinese tourists to the island in 2014 (Guam Visitors' Bureau 2014, cited in Brown 2014).

Based on her initial research, Francisca had already decided that Chinese tourists and their spending power would be an interesting and topical area for her project. China was the fastest-growing tourism source market in the world, and Chinese expenditure on travel abroad had reached US\$ 102 billion in 2012, a 40 per cent increase compared with the year 2011 (World Tourism Organization 2013). Moreover, according to a recent report produced by Global Blue, Chinese tourists had been the top spenders in tax-free shopping over the last few years, spending on average more than 800 euros per transaction (Global Blue 2014). Understanding the buying behaviour of these highly valuable shoppers seemed an important topic for any global retailer, including those involved in duty-free shopping. Francisca considered this was a very promising and practical idea for her research project.

Francisca had initially stated that the aim of her project would be to understand Chinese tourists' buying behaviours and motivations in duty-free shopping stores. She had discussed this with her project tutor, who had commented that she still needed to refine her research aim further. He had also emphasised that she needed to be clear about her own research philosophy as this would underpin her research design. Her friend had introduced the duty-free retail manager in Guam to

Francisca, and the manager had given permission for Francisca to conduct her project in the store. The manager emphasised that, since the Chinese tourists are new customers for Guam, it would be really helpful for the store to know what kinds of consumers they were and what motivated them to shop at the duty-free. Based on this Francisca had revised her aim: to establish the characteristics of Chinese tourists, and how these characteristics affect their shopping motivations in duty-free stores.

Francisca believed that a data collection technique like interviewing would not enable her to address this research aim. She felt that interviewing a small number of tourists would not provide enough data to reveal the observed behavioural patterns of the majority of Chinese tourists in Guam. She wanted her findings to be representative of the actual behaviour of Chinese tourists in Guam; she wanted to collect quantitative data using a questionnaire which she could analyse statistically.

Francisca's thoughts turned to her research philosophy. This she considered was more in line with positivism than other philosophies such as interpretivism. She was going to design a questionnaire asking Chinese tourists about their motives for shopping at duty-free stores in Guam. However, she had a dilemma. From her research methods lectures, Francisca knew that, as a positivist, she should maintain an independent and objective stance, not allowing her values or opinions to influence her research. However, when she was thinking about her research, she found herself constantly recalling her own shopping experiences in duty-free stores. She felt she could identify with tourists' motives to shop, such as buying a gift for family or friends. Her friend who worked at the duty-free store had also given her some ideas about Chinese tourists' motives for shopping. If she used such sources, her research design would be considered subjective. This, she felt, did not seem to fit with positivism.

Francisca reminded herself she needed to be objective. Even though she had some prior experiences of shopping in duty-free stores, she recognised that these were her views rather than those of other consumers. She also noted that she was interested in the patterns of the consumers' behaviours, rather than an individual's opinion. After further searching, she found a paper that might serve as her theoretical foundation, as the reported study investigated the possible reasons why consumers shop at airports. Crawford and Melewar (2003) provided several explanations for buying behaviour at airports, such as gift giving, killing time and disposal of foreign currency. Francisca decided she could use the reasons identified in this study to design a questionnaire. She commented to herself, 'by doing this the reasons identified will be derived from scientific research, not my own subjective experiences. My research idea is more aligned to positivism as I am observing the behavioural pattern of Chinese tourists, and looking to discover law-like generalisations, rather than just their perception as individuals.'

Francisca had made up her mind. As air travel and Chinese tourists' spending continued to follow an upward trend, she believed that her research would be interesting and practical for the field of global retailers. Now it was time to enjoy the rest of Saturday night.

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Questions

- 1 Why do you think Francisca considered her research idea unsuitable for interpretivism?
- 2 How did Francisca solve her dilemma? Is there any other way to solve it?
- 3 How might Francisca's positivist philosophy and approach impact her research process?

Additional case studies relating to material covered in this chapter are available via this book's companion website: www.pearsoned.co.uk/saunders.

They are:

- Marketing music products alongside emerging digital music channels.
- Consultancy research for a not-for-profit organisation.
- Organisational learning in an English regional theatre.



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 a manager is 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 it is predictable that managers would say that the purpose of organisational investigation is to develop recommendations for action to solve problems without 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 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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