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Qualitative Research: The Toolkit of Theories in the Social Sciences

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1. Introduction

In recent years, the social sciences¹ have witnessed an explosive surge in textbooks, disciplines, specialties, publication venues, research centers, etc. However, few books have addressed the theoretical status of the social sciences as a whole. One reason is that theory is simply understood as a purely intellectual exercise withdrawn from reality and human progress. Another reason is that for a long time, qualitative research, the toolkit of theories in the social sciences, has been considered inferior and weak in scientific research. Still another reason is that authors tend to situate qualitative research's beginnings in the 1920s or 1960s, while leaving aside important social theorists. As a result, misunderstandings concerning social science research have increased. For example, social science research has been equated with the endeavor to interpret meaning and/or study subjective and non-measurable phenomena. While such assumptions can be true, they represent a distortion of social science research and reduce the potential role of theory construction in the social sciences. This chapter takes stock of the role of theory in the social sciences. To this end, the chapter maps the broader history of qualitative research, diffuses some misunderstandings, appraises the specifics of qualitative research, and outlines some practical consequences for theory building in the social sciences.

The last few decades, the social sciences have seen a burgeoning interest in qualitative research even as textbook materials have become one of the most flourishing markets of our times. A Web tally of the five largest and best known publishing houses of social science materials in the world—Sage Publications, headquartered in Thousand Oaks, CA, US (<http://www.sagepub.com>); Taylor and Francis Group, headquartered in London, UK (<http://www.taylorandfrancis.com/>); Pearson Education, headquartered in Upper Saddle River, NJ, US (<http://www.pearsoned.com>); Cengage Learning, headquartered in Stamford, CT, US (<http://www.cengage.com>); and Rowman and Littlefield, headquartered in Lanham, MD, US (<http://www.rowmanlittlefield.com>)—shows that for the year 2010 alone two research methodology textbooks appeared every day. This tally does not involve the

¹ For the purposes of this chapter, the social and human sciences are taken to be interchangeable since these groups of sciences had been criticized all together for having a weak scientific character. For interested parties, Cibangu's (2010) article sketches the differences between the social and human sciences.

outputs of university presses, which commonly publish textbooks and references, or of small-scale publishing companies unincorporated by the five publishing companies listed above. Also worth noting is the fact that publishing houses increasingly require textbooks to include both quantitative and qualitative research to ensure a broader marketing and more persuasive academic reach. "Hardly any handbook is published today that does not have a chapter on qualitative research methods" (Flick, 2002, p. 6). However, despite the rise in qualitative research methods in published textbooks and journals, reflections on social science theory remain scant.

The relevance of qualitative research for social science theory owes much to the core of qualitative research. In effect, it is not that quantitative research cannot generate theories (see Shoemaker, Tankard, & Lasorsa, 2004), but that qualitative research, as apparent below, has a much greater realm of theory creation than does quantitative research. The legendary theory productivity of qualitative research stands on the fact that qualitative researchers deal with the real world in its fullness whereas quantitative researchers intentionally manipulate the world through the lenses of pre-set laboratory and/or laboratory-like questionnaires and samples (Creswell, 2008, 2009). Quantitative research pursues the controllability and manipulability of the independent variable(s) at the exclusion of all external and internal factors (hence the word independent) to allow for the predictability of intended outcomes (dependent variables). The required manipulability of quantitative research reduces, and most often disguises, the already infinite scope of people's lifeworlds and creativity. Quantitative researchers disconnect themselves from the real world in order to manipulate and study the selected phenomenon. Qualitative researchers, however, seek out and immerse themselves into the real, uncontrolled, crude, and non-manipulated world (of humans) to derive and interpret the hidden patterns (theories). It becomes clear that there are more theories to discover in the real world than there are in a laboratory and the like.

On another level, the growing, and often erratic, combination of qualitative and quantitative methods has led many to believe that qualitative research can be best studied only in comparison with and/or in appendix to quantitative research. Such a belief belies the theoretical/practical role of qualitative research. Two good examples are gender and food. Though women can be seen as complimentary to men, should they be studied only in comparison with men? Certainly, women present a nature proper to them that requires no comparison with men. Though they can be mixed with rice to form one protein-filled meal, should beans be studied only as supplementation to rice? Beans present specific characteristics of their own, irrespective of rice. Still, the good news concerning the combination of qualitative and quantitative methods is that it calls for good social science research. Brady, Collier, and Seawright (2006) remarked, "too many qualitative and quantitative studies are simply bad work. We believe that both sides in the qualitative-quantitative debate would be more credible if they began by acknowledging how hard it is to do good social science" (pp. 354-355). Familiarity with discussions of qualitative research, through increased exposure and involvement, can help the social sciences to achieve sound research of qualitative methodology needed for theory creation. This chapter is organized into six parts: (1) definitions of basic concepts, (2) theory/theoretical contribution, (3) historical background of qualitative research, (4) misunderstandings around qualitative research, (5) specifics of qualitative research, and (6) practical consequences.

2. Definitions of basic concepts

Before we begin our discussion, the clarification of a few basic research concepts is helpful. There has been an increase in the use of varied—and often confusing—terminology in research textbooks. A typical example is with the concept research process alternatively called *research methods* (Crowther & Lancaster, 2008; Graziano & Raulin, 2010; Patton, 2002; Thomas, Nelson, & Silverman, 2005), *research methodologies* (Ackroyd, 2006; Noble & Bestley, 2005; Yeboah, 2008), *research design* (Creswell, 2009; Hakim, 2000; de Vaus, 2001; Gschwend & Schimmelfennig, 2007), *social research* (Babbie, 2010), or *analyzing social settings* (Lofland, Snow, Anderson, & Lofland, 2006), among others. For the sake of simplicity, four concepts central to our debate need precision: (1) methodology, (2) method, (3) qualitative research, and (4) case study.

First, we will begin with the two closely related terms: methodology and method. While it is impossible to put enough stress on the importance of methods and methodology in research design, it is equally difficult to arrive at a fixed and unified definition of both terms. For example, in their landmark works on research, Brady, Collier, and Seawright (2010), Collier, Brady, and Seawright (2010), Denzin (2009, 2010), Denzin and Lincoln (1998, 2003a, 2003b, 2005, 2008a, 2008b, 2008c, 2011), and Lincoln and Denzin (2008a, 2008b) employed methodology and method interchangeably, whereas Mason (2002), Teddlie and Tashakkori (2009), and Tashakkori and Teddlie (2010) described methodology and methods as different.² This chapter regards methodology as a suite of methods governed by chief philosophical underpinnings of research, namely, positivism and interpretivism (details below), and method is understood to be a selected strategy or technique with which to address the questions raised in the research process (e.g., discourse analysis, focus group, observation, interview, etc.).³ The third term that needs definition after methodology and method is qualitative research. Carried to its fundamental roots, qualitative research is a research whose means of data analysis is not statistical, and which can involve one participant (n=1), be it a document, event, process, individual, concept, organization, etc. We will discuss the characteristics of qualitative research later; for now this basic definition should suffice. Fourth and last, case study is a systematic investigation of an individual, phenomenon, idea, document, etc. (Ragin, 1987, 1998, 1999, 2004, 2009; Stake, 2008; Yin, 2003, 2009). While it can be quantitative, case study in this chapter is taken to mean qualitative case study. Let us turn now to the concept of theory and theoretical contribution.

3. Theory/theoretical contribution

In this section, we will discuss theory and its corollary, theory construction. First, theory figures among the least valued concepts of academia and industry. All too often, theory is understood as a body of concepts withdrawn from reality. More specifically, theory is seen as an anti-thesis to practice. However, theory lies at the core of research practice and human

² Beware that entire chapters have been reproduced verbatim across Denzin's and Lincoln's oeuvre. Two examples, among others, Denzin's & Lincoln's (2008a) preface and Denzin's & Lincoln's (2008b) introduction to *Landscape of Qualitative Research* have been copied and pasted as Denzin's & Lincoln's (2008d) preface and Denzin's & Lincoln's (2008e) introduction to *Strategies of Qualitative Inquiry*, respectively.

³ This definition is a revised version of Picard's (2007) definition.

existence. Humans have a tendency to theorize their experience into patterns. For example, we see things, love people, and make decisions based on the implicit or explicit theories we hold. The critical theorist Adorno (1951/1974) noted, "since utopia was set aside and the unity of theory and practice demanded, we have all become too practical. Fear of the impotence of theory supplies a pretext for bowing to the almighty production process" (p. 44). To a great extent, the mass production of technologies has accentuated this theory-phobia. Authors have also believed that theories do not exist nor do we need them in our existence. This position denies the importance of theory to both the natural and social sciences.

There is no theory. In fact, I don't know of any theory in the social sciences. I don't think the term theory should be applied to fields as intellectually thin as the social sciences. So there is no theory... Theory is very different from understanding... We live our lives often pretty successfully without any theories about other people... There is very few areas of human life where there is anything you might call a theory. Even in biology... Use your sense... you can get as good a sense of the world as anybody does [without theory]. (Chomsky, 1998, n/p)

As shown below, theory is essential to science and human reality. But it should be noted in passing that Chomsky proved to be an influential theorist in the social sciences, in general (detail below), and the field of linguistics, in particular. Without theory, no science and skill can be taught and/or improved over time. It is the case that both the natural and social sciences are made up of a common core of materials used in the fundamental courses of these fields. Sociologist Parsons (1938) wrote, "this common core is not only a body of discrete miscellaneous facts - [but] it is closely integrated with a logically elaborated body of theory - much of which... is stated in a highly generalized form" (p. 13). Theory constitutes the core body of a science's literature, which is criticized, evaluated, and revamped over time in a logically articulated manner. The best way of imagining theory is through the idea of criticism, the substance of theory. Imagine what would become of science and human existence without criticism? One of the goals of repressive regimes is to prevent criticism. The more repression a society is faced with, the less progress and freedom it suffers. "Theory and theorising play key roles in both the natural and the social/behavioural sciences... Both natural and social sciences are empirical in nature, with theory as the primary product" (Venable, 2006, p. 2). Theory plays a vital role in research processes and human existence. Critical discussion allows progress, invention, and creativity. The now widely accepted notion of freedom of speech is an expression of critical discussion.

Another commonly believed idea presents theory as an anti-thesis to reality. As Muirhead, one of Aristotle's best commentators, explained,

Theory is sometimes thought of as concerned with general laws, and therefore as the antithesis of fact and reality. But this, of course, is a misunderstanding. The function of theory is not to carry us away into a region of abstraction and comparative unreality, but to put us into closer touch with fact. (1900, p. 21)

Theory constitutes a tool with which to gain a tighter grasp of reality. Theory is a set of propositions that explain specific relationships between the phenomena being studied. "Theories, however, are a large part of our world, framing the way issues are seen, shaping

perceptions of salience, and thus slanting debate toward certain policies rather than others” (Nussbaum, 2011, p. xi). Theories are the lenses through which we interact with the world.

While there is no unified definition or exhaustive list of theory, it is possible, and in fact important, to derive the commonly featured characteristics of a theory. This chapter explains the four characteristics of a theory outlined by Eisenhardt (1989) and Whetten (1989). Eisenhardt’s and Whetten’s works have served as the classical materials of theory construction in the social sciences.⁴ In simpler and softer terms, Whetten (1989) defined theory as follows,

A complete theory must contain four essential elements... *What*. Which factors (variables, constructs, concepts) logically should be considered as part of the explanation of the social or individual phenomenon of interest... *How*. Having identified a set of factors, the researcher’s next question is, how are they related?... Such a step adds order to the conceptualization by explicitly delineating patterns. In addition, it typically introduces causality... *Why*. What are the underlying psychological, economic, or social dynamics that justify the selection of factors and the proposed causal relationships? This rationale constitutes the theory’s assumptions – the theoretical glue that welds the model together...Who, When, and Where. These conditions place limitations on the propositions generated from a theoretical model. These temporal and contextual factors set the boundaries of generalizability, and as such constitute the range of the theory [italics in original]. (pp. 490-492)

The whats and hows describe the concepts, constructs, characteristics, frameworks, and theories gleaned from the bodies of literature concerning the thing being studied. The whys explain the observed patterns and lay out the discrepancies and similarities. The whos, whens, and wheres set the limitations inherent in the researcher’s suggested theory and chosen methodology. In essence, theory represents a set of demonstrated relationships between selected variables or constructs. In other words, with a proposed theory, the researcher aims to capture and demonstrate the missing relationship(s) in the observed patterns or regularities. Theory is not just mere speculation about the observed relationships, but a definite contribution to the field and the world. This chapter insists on contribution to the researcher’s field (for contribution to the world, see Cibangu, in press).

The second and last point after the definition of theory is the issue of theoretical contribution. Without contribution, science becomes a nuisance or mere verbiage. Like theory, theoretical contribution is seldom discussed, but it provides the substance of scientific work. As should now be clear, by probing the whats, hows, whys, whos, whens, and wheres within a body of work, a sustained discussion of the theories offered in selected social science literature is likely to strengthen the theoretical contributions in the selected area of research. In order to make a contribution, a suggested theory needs to be unique and novel in relation to the literature. Theoretical contribution endeavors to detect and address the gaps, insufficiencies, and weaknesses in relevant literatures to propose newer and tighter relationships about the selected phenomena. Theoretical contribution comes from the

⁴ For advanced discussion about theory construction (also called theory development or theory building), de Jong (2010), George and Bennett (2005), Haynes and Carroll (2010), and Jaccard and Jacoby (2010), among others, supplied helpful reflections.

theory arrived at in a research. Theory construction allows researchers to craft contributions to their fields. Put more clearly, theoretical contribution distinguishes scientific work from other forms of work, such as political speech, newspaper articles, mission statements, art works, diaries, commentary, personal communication, TV shows, etc. One can undertake a research that impacts, and in fact changes, the whole world, but without theory, the research/project is not scientific. It is not the efficient and usually (cost-)effective implementation of the research project and its practical consequences that make the project scientific, but the theory arrived at. Eisenhardt (1989) wrote,

An essential feature of theory building is comparison of the emergent concepts, theory, or hypotheses with the extant literature. This involves asking what is this [observed finding and tendency] similar to, what does it contradict, and why. A key to this process is to consider a broad range of literature. (p. 544)

Such a process requires a broad-based groundwork in the wealth of theories attendant on the key concepts of the selected social science research. The point here is to juxtapose conflicting literatures and findings. Eisenhardt (1989) explained,

Conflicting literature represents an opportunity. The juxtaposition of conflicting results forces researchers into a more creative, framebreaking mode of thinking than they might otherwise be able to achieve. The result can be deeper insight into both the emergent theory and the conflicting literature, as well as sharpening of the limits to generalizability of the focal research. (p. 544)

Selected literature lays bare a number of concepts, hypotheses, and theories. The researcher does not seek to settle the debate, but to raise awareness about the conflicting and solid relationships encountered in the literature. Exposure to and involvement with these and many other relationships are not a solution, but a toolkit needed for firmer and newer research insights. Since qualitative research has grappled with the philosophical underpinnings of social science research, the background of qualitative research is important in order to ensure solid theoretical contributions in the social science literature.

4. Historical background of qualitative research

The background of qualitative research comprises a range of thinkers and related theoretical traditions. Qualitative research is deeply rooted in the social sciences' developments. Nevertheless, despite its recent forays in the publishing market, research methodology literature has accorded little attention to the history of qualitative research. As demonstrated below, this methodological restriction has precipitated innumerable misunderstandings about qualitative research and its potentials for theorization. Much of the literature situates the beginnings of qualitative research and its textbooks in the 1960s and 1970s (Flick, 2002, 2009; Gobo, 2005; Knoblauch, Flick, & Maeder, 2005; Patton, 2002). The most common history of qualitative research is the one succinctly proposed under the rubric of (eight, now nine) historical moments. This history of qualitative research is limited to the US (Denzin, 2010; Denzin & Lincoln, 2005, 2008b; Lincoln & Denzin, 2003, 2008b), and is said to have started in the 15th – 16th centuries under the banner of descriptive anthropology or ethnography (Vidich & Lyman, 1998, p. 46). Originally, the historical moments of qualitative research were five (Denzin & Lincoln, 1998). As Denzin

and Lincoln noted, “we employed an arbitrary historical model” (2005, p. xiii). This is not to say that there is a perfect historical model, but that significant portions of qualitative research’s tradition have been omitted. However, works of qualitative research trace as far back as Antiquity. In fact, Antiquity brims with examples of qualitative work. For our discussion, I will present three most important ancient writers: the Egyptian Ptahhotep (25th c. BC, Parkinson, 1991), Herodotus (5th c. BC, 1957, 1960), and Aristotle (4th c. BC, 1853).

Despite the disparity between educated and uneducated people in his times, the ancient Egyptian philosopher Ptahhotep valued the necessity of talking to both groups of people. He wrote, “be not proud for being wise. Consult with the ignorant as with the wise” (Parkinson, 1991, p. 66). Textual analysis of this passage reveals interesting consequences for our discussion. The *Oxford American Dictionary* (1999) provides the following synonyms for the term ignorant: illiterate, uneducated, uninformed, unlearned, unlettered, and untutored. It can be argued that in-person interview of illiterate individuals was found to yield invaluable information. Theorization is taking place around the lived experiences of participants, outside the context of classrooms and laboratories. Because they involve human sensory expressions to their full extent, lived experiences can be used as a basis for theory formation. Such a preferred mode of inquiry represents an accomplished qualitative technique since, per statistical norms, a written questionnaire or survey requires informants to be educated.

The second ancient author is Herodotus. Conducted over three decades using in-person contacts with respondents, as well as open-ended interviews, Herodotus’ (5th c. BC, 1957, 1960) work constitutes, to my knowledge, the largest recorded fieldwork material concerning world population. Despite its limitations, Herodotus’ study brought to bear highly detailed knowledge about selected respondents, providing details of aspects as diverse as cultural, linguistic, political, geographic, historical, and physical information, all of which is unfeasible with standard quantitative method. For focus purposes, the present chapter does not consider the whole nine-volume collection of Herodotus’ histories nor does it intend to supply a specialized qualitative research study focused on Herodotus’ work. Interested parties can read Lateiner (1989). Herodotus’ work points to the significance of historical methods (Gilderhus, 2009; Howell & Prevenier, 2001; McCullagh, 1984), which has yet been underutilized in qualitative research. For example, with its probe of reasoning, researchers’ biases, fact (re)presentation, and sources/documents, historical criticism is a powerful tool for any research design. Historical methods help look at authors and events in the past, their lifeworlds, works, effects, and the significance of their embedded theories. The idea is to immerse in the real context of participants and interpret the patterns carried over time beneath people’s lifeworlds.

The third work is Aristotle’s (4th c. BC, 1853) famous posthumous *Organon*, especially the sections *Prior Analytics*, *On Interpretation*, and *Posterior Analytics* (see also Corcoran, 1974, 2003, 2009). Aristotle propounded the idea of context-bound universal truths. He laid out the procedures of the validity and invalidity of scientific knowledge on the basis of one or a small number of cases (i.e., syllogisms). He understood theories as scientific knowledge or universal truths. It is inexplicable that research methodology theorists have taken the validity of scientific knowledge to be equated with and limited to specific statistical tests of

experimental research while leaving aside Aristotle's magisterial writing. As Corcoran (2003) stressed, "by setting forth in clear and systematic fashion the basic methods for establishing validity and for establishing invalidity, Aristotle became the founder of logic as formal epistemology" (p. 261). Logic is ideally case-specific and context-bound analysis, the core feature of qualitative research. Common to logic are the following areas: causality, counterfactual analysis, inference, etc. (see Baumgartner, 2008, 2009a, 2009b, 2010; Braham & van Hees, 2009; George & Bennett, 2005; Heckman, 2005; Hendrickson, 2010; Morgan & Winship, 2007). In lieu of and contrast with randomized and representative samples, Aristotle established the validity of scientific knowledge by using (1) a purposefully selected small number of cases, (2) everyday human experience, and (3) real life context. All these criteria, as apparent in this paper, lie at the heart of qualitative research's canon. In the Aristotelian methodology, human sensory expressions were not a threat to scientific knowledge; rather, they enabled it. In this regard, scientific knowledge combined the natural and human sciences. Theorization in Antiquity implied the concepts of people's lived experiences, lifeworlds shared over time, context-bound universal truths, and logical validity.

In the meantime, Antiquity saw authors who rejected human sensory expressions and real context as reliable sources of knowledge. Plato (5-4th c. BC, 1997), for example, defended universal knowledge as one that is unchanging, non-context-specific, stable, and independent from the sensible world. Though beyond the scope of the present chapter, the argument of realism in Plato's work can very well be made, which implies that knowledge is context-specific, see Grabowski (2008) and Plato (4-5th c. BC, 1921, 1925, 1966). For advanced discussion of Aristotle's realism see Fine (2004) and Rickless (2007), among others. This chapter focuses on Aristotle because of his seminal work (4th c. BC, 1853) on the validity of scientific discourse. Notable examples of the rejection against human sensory expressions were also the Milesian (from Miletus, the ancient Greek city) Greek philosophers such as Thales (7th-6th c., BC), Anaximander (7th-6th c., BC), and Anaximenes (6th c., BC), among others, who considered supernatural, artistic, religious, mystic, and human expressions as irrelevant to and incompatible with scientific knowledge (Duignan, 2011; Gill & Pellegrin, 2006; Gottlieb, 2002). Aristotle's seminal work (4th c. BC, 1853) *Organon* inscribed itself against such anti-human and pure-rationalistic science, to give just one example. The Aristotelian work left an indelible impact on research methodology from Antiquity onward. The three selected ancient writers Ptahhotep (Parkinson, 1991), Herodotus (5th c. BC, 1957, 1960), and Aristotle (4th c. BC, 1853) show that universal knowledge involves context-limited conditions (i.e., in-person contact, illiterate individuals, small cases, etc.), human sensory expressions, and lifeworlds shared over time. In this sense, knowledge integrates the human and natural sciences since the patterns observed in the natural sciences do not differ from those encountered in people's lifeworlds.

The Middle Ages inherited Antiquity's scientific discourse, whose methodology was based on human sensory expressions, logic (case analysis), people's lifeworlds, and the combination of the natural and human sciences. In the 11th century, in his famous encyclopedia of medical knowledge, the Persian scholar Avicenna (1025/1970) provided a case analysis methodology for the purposes of experimental medicine. Avicenna's work aligns itself with a research practice called casuistry (Jonsen & Toulmin, 1988),

widespread in the Middle Ages, which means the study of cases, from the Latin word *casus* [case]. Casuistry goes back to the Aristotelian case analysis logic. Another characteristic is that the Middle Ages, especially the 1400s and early 1500s, saw a great emphasis placed on human ideals and values to infuse technology. And medieval technology expanded tremendously with the press and the construction of public buildings and cathedrals across Europe. Related exemplars include Leonardo da Vinci (1452-1519), Johannes Gutenberg (1398-1468), and Leon Battista Alberti (1404-1472), among others (Burke, 1999; Copenhaver & Schmitt, 2002; King, 2003; Kristeller & Mooney, 1979). Technology was taken to be integral to human ideals and values. To be scientific, educated, or learned during this time was synonymous with acquiring technical skills as well as the humanities. The humanities concerned themselves with human sensory expressions and lifeworlds. Put differently, the human sciences are ones that deal with the inner and/or exterior behavior of humans active or recorded in writings or art works whereas the social sciences consider human interaction to be the central piece in the study of social reality. One can see that scientific discourse does not draw its legitimacy from the rift between the natural and social sciences, nor is it exhausted by the natural sciences. Coupled with case-specific analysis, the Antiquity-inherited mindset of human-natural integrated science grew into modernism, with the view to improve human material and spiritual conditions.

In the 1600s and 1700s, however, the modernist era brought case-specific (logic/philosophy) and context-bounded knowledge and related human values and ideals under considerable attack. In this chapter, modernism is not understood as literary work, art design, and architecture, but as the line of thought, inherited from positivism, which teaches the power of reason to conquer nature and improve human conditions (see Kumar, 2005). The modernist era defended a new idea of science that magnified the power of reason to conquer nature. Several historiographers of science (Burke, 1999; Copenhaver & Schmitt, 2002; King, 2003; Kristeller & Mooney, 1979) showed that the modern period started principally with the English philosopher Bacon (1561-1626) and French philosopher Descartes (1596-1650). Bacon (1605/1960) wrote *New Organon* in an attempt to replace Aristotle's (4th c. BC, 1853) *Organon*. Bacon's goal was to present scientific knowledge in the manner of natural laws and properties, which Bacon thought to be unchanging, stable, universal, and independent from context and human feelings. Big numbers reflected universality and stability whereas small numbers symbolized variability and particularity. Qualitative research was accorded less value due to its characteristic of small-number samples. The subtitle of Descartes' (1637/1987) work, *Discourse on the method*, is also suggestive: *to guide well the reason and seek truth in sciences*. Both the Baconian and Cartesian lines of thought celebrate the absolute power of reason. Since natural laws could be replicated to make machines and tools, they were thought to be the explanation and foundation of human reality. Bacon's (1605/1960) *New Organon* was based on the famous four idols and accompanying aphorisms that present human nature as a definite deterrent to correct reasoning. Correct reasoning had to detach itself from human inherently misleading tendencies, by using objective tools of measurement and neutral knowledge procedures. For Bacon, human feelings and preconceived ideas—that is, biases—were the sources of error from which to *methodically* protect the intellect. Relegated to metaphysics or philosophy, theory was viewed as a diversion from natural

laws and human progress. Therefore, science was intended to allow full, objective, and undisturbed use of reason to conquer nature, enlighten the intellect, and improve human society. This era led to the Enlightenment or Age of Reason. Replication (replicability) of natural laws created an unrestrained pursuit of law-like explanations of reality such that human expressions were seen as alien to and incompatible with natural laws.

Curiously enough, it was within the Age of Reason setting that most universities were formed in North America and Western Europe and that traditional social sciences—such as sociology, anthropology, political science, psychology, and economics—came to be recognized as academic disciplines. Consequently, the Age of Reason influenced the ways in which social science and qualitative research methodology was undertaken for a long period of time. Knowledge acquisition was understood as the endeavor to conquer and master the universe and its objective laws. For example, it was in allegiance to the Baconian (Bacon, 1605/1960) aphorisms that French social thinker Durkheim⁵ (1894/1988) proposed aphorisms that were detached from passions and opinions to define social facts as forces that prevailed upon, and that were independent from and exterior to individuals and their feelings and preconceived ideas. More particularly, Comte (1848/1999) popularized the word positivism by presenting sociology as positive, since it replicated objective principles. Positivist research methodology seeks knowledge through observation and experiment, in opposition to human feelings, emotions, dreams, ideals, and the like. As is clear above, Bacon's (1605/1960) work has left its marks on social science methodology and has embodied the cornerstone of positivism. It is problematic, then, that so many research methodology discussions bypass Bacon's work.

Nevertheless, since the 1800s and early 1900s, Bacon's (1605/1960) methodology has drawn strong criticism from within the social sciences, the most poignant manifestations of which took place from a variety of fronts under the banner of anti-positivism. The goal of this criticism was to demystify the Enlightenment's claim to absolute powers of reason and the accompanying objective universal methodology. Science's goal shifted from the replication of objective natural laws to the in-depth understanding of nature and individuals. Authors were as diverse as Bachelard (1884-1962), De Tarde (1843-1904), De Tocqueville (1805-1859), Dilthey (1833-1911), Freud (1856-1939), Husserl (1859-1938), Marx (1818-1883), Mill (1806-1873), Simmel (1858-1918), Weber (1864-1920), and Windelband (1848-1915), among others. With this host of critics, Bacon's science project did not succeed in overthrowing the tenets inherited from Aristotle's *Organon* (4th c. BC, 1853). For example, Bachelard (1934) outlined the limitations of realism and rationalism defended as absolute in positivism. De Tarde (1890/1993) championed the study of interaction between small numbers of individuals. De Tocqueville (1840/2004) defended the importance of knowledge embedded in the particulars. Dilthey (1988, 2002) propounded the scientific status of the human sciences and related lived experiences. Freud (1900/1913) showed that reason is governed by irrationality. Husserl (1913/1962, 1952/1980) presented metaphysical subjective philosophy as a rigorous discipline. Mill (1843/1872) provided a detailed invaluable account of causal

⁵ An important clarification to make here is that in his other works, Durkheim (1893/2007, 1912/2008) presented us with substantive, yet very often forgotten in research methodology materials, support for case study research, see also Rawls (1996) for further discussion of Durkheim.

inferential knowledge using a small number of cases. Marx (1867/1977) observed that the power of reason engendered increased contradictions in society between the poor and the rich, exploitation and progress, production and dehumanization, etc. Simmel (1908) and Weber (1921/1972) propounded a sociology that looks at individuals' lived experiences. And Windelband (1894/1980) identified scientific knowledge in situated historical circumstances. In one form or another, these authors have expanded on qualitative research's doctrine.

For focus sake, however, three key figures need attention: Simmel (1858-1918), Weber (1864-1920), and Bachelard (1884-1962). Simmel (1908) and Weber (1921/1972) were credited with applying anti-positivism in the social sciences by propelling the German concept *verstehende Soziologie*, commonly translated in English as interpretive sociology, to suggest a more effective means of social research beyond the traditional arm-chair research. Interpretive sociology's views have pervaded research methodology across disciplines. It is not possible to chronologically and semantically distinguish Simmel from Weber in their usage of the term interpretive sociology, since they each presented significantly similar and contemporary insights of the term. Chief among these insights was an increased focus on historical context, experience, and meaning in the path to a better understanding of cases and of social phenomena from the perspective of concerned parties. Also similar and contemporary to Simmel and Weber was the notion *verstehen*, which gained prominence in hermeneutic and phenomenological circles⁶. Although seldom acknowledged in research methodology materials, interpretive sociology embodies the protocol in light of which the concept of interpretivism has been ascribed to the social sciences in general and to qualitative research in particular.

While it can involve – and even be limited to, as is often the case – the study of meaning, text, or human experiences, interpretive sociology, or interpretivism, outstrips a human-, text-, or meaning-bounded conception of qualitative research by inquiring about all aspects of reality, from objects to human experiences to social phenomena⁷. The widespread meaning-bounded perception, or semanticization, so to speak, of interpretivism falls short of qualitative research's tradition. In fact, the connotation of meaning for the German verb *verstehen* is overwhelmingly minor. Out of six outlined meanings (Duden, 1996, p. 1667) of *verstehen*, four are important for our discussion (I changed the enumeration, for ease of use):

1. in Bestimmter Weise auslegen, deuten, aufassen,
2. sich in jemanden, in jemandes Lage hineinversetzen können,
3. eine Verhaltenweise, eine Haltung, eine Reaktion, ein Gefühl eines anderen) vom Standpunkt des Betreffenden gesehen, natürlich, konsequent, richtig, normal finden,
4. gut können, beherrschen... Also interesting is Denzin's (1997) application of the concept interpretive, wherein Denzin went beyond the visual and scriptural dimensions of text and meaning by suggesting the performance of text and people's lives, *ethnodrama* or *ethnoperformance*. Interpretivism makes re-live people's lifeworlds.

⁶ For further discussion about the concept interpretive in general one can read Hiley, Bohman, and Shusterman (1991), Mueller-Vollmer (2006), and Moran and Mooney (2002), among others.

⁷ For a broader view of interpretivism, see Denzin and Lincoln (2005), Lincoln and Denzin (2008a), Korte (1999, pp. 86-116), Treibel (1999, pp. 111-132).

The best example of meaning reductionism is with language. One can know, in fact even be a native speaker for, the meaning of the words used by a person, but be unable to understand the person's experiences (i.e., struggles, pains, feelings, views, etc.) behind how the words are being used. Another example is with technology. One can understand what a car is or means and still lack in-depth understanding about the nuts and bolts, so to speak, of the car. Simmel (1908) propelled the importance of not only understanding the Other, but of the Other being understood⁸. Interpretivism serves as the marker of qualitative research (Denzin & Lincoln, 2008b; Knoblauch, Flick, & Maeder, 2005) and rebuts the positivistic postulates of methodology. It follows that interpretivism aims to decipher the patterns that compound the clues, puzzles, and forces hidden beneath specific cases and/or human experiences, feelings, ideas, values, beliefs, symbols, etc. When articulated by the researcher, patterns observed beneath lived experiences are turned into theories.

Another seminal, yet often forgotten, contribution to the qualitative tradition is the philosopher of science Bachelard (1884-1962), whose majority of works remains unknown and non-translated in English-speaking academia. Bachelard (1938/2004) was noted for his critique of Comte. Toward this end, Bachelard developed at length the concepts of knowledge shifts and of the discontinuous progress of science, from which Kuhn's (1996) idea of paradigm shift has been drawn. The Russian-born French philosopher of science Koyré (1892-1964), whose (Koyré, 1939) works Kuhn (1996) extensively read and referenced, acknowledged these concepts as having been borrowed from Bachelard. Methodology is thus understood to be a continuous rupture of established and imposed assumptions, truths, and knowledge. Bachelard (1934) was of the opinion that there was no such thing as absolute realism and rationalism, the key tenets of positivism.⁹ As is clear below, this is an important statement of qualitative research. At another level, Bachelard (1938/2004) stated that researchers need to break away from the pride of universal certainties and from the greed for particular certainties.¹⁰ It follows that qualitative research does not seek global/universal or local/particular certainties as an end product but, instead, for the purposes of deep-rooted understanding. In their pursuit of theories, researchers need to be aware of this epistemological risk: the pride of universality/globalism and the greed of particularity/localism.

In the 1920s, qualitative research received further impetus from the advent of non-traditional school-driven movements of research. For example, integrating Marxism and Freudianism, the Frankfurt School (Honneth, 2007; Horkheimer & Adorno, 1947/1989; Martin, 1996; Wiggershaus, 1998) criticized the ways in which reason was not objective and rational, as had been proclaimed in the Age of Reason, but was instrumentalized to create and maintain massive domination and poverty in industrial societies. Armed with in-person small-scale interaction and participant observation, the Chicago School (Bulmer, 1984)

⁸ "durch Verstehen Anderer und Verstandenwerden" (Simmel, 1908, p. 674).

⁹ "Il n'y a ni réalisme ni rationalisme absolu" (Bachelard, 1934, p. 6). This book has been translated into English by Beacon Press (Bachelard, 1934/1985).

¹⁰ "Rompons, ensemble, avec l'orgueil des certitudes générales, avec la cupidité des certitudes particulières" (Bachelard, 1938/2004, p. 290).

undertook dedicated field research in the vastly impoverished outskirts of Chicago. A later version of the Chicago School, symbolic interactionism, emphasized meaning in the processes of everyday interaction.

The second half of the twentieth century moved toward contemporary qualitative research wherein the all-too-devastating effects of the two world wars brought to light both the value and frailty of humans and their societies. In the 1960s and 1970s, postmodernism (Rosenau, 1995; Ward, 2003) began to posit that authority, knowledge, certainty, truth, subjectivity, and so on, are not imposed, essentialized, or absolute from the top down, but are locally and individually constructed. Postmodernism will determine much of contemporary qualitative research, all of which recalls the demystification of absolute reason of the modernist era. As Lincoln and Denzin (2003) stated,

We do not “choose” to be postmodern. The historical moment has chosen us. The implications of this understanding, of this resituating of the argument are enormous... We are not free to “choose” postmodernism. It is the historical moment when the modernist epoch ends. (p. 1060)

Therefore, qualitative work is understood along the lines of postmodernism in its varying forms. With its reversal of the top-down absolute power of reason, postmodernism has led to different variants of locally-driven and empowering movements of thoughts such as postcolonialism, gender studies, cultural studies, etc. One of the most known variants of postmodernism that has been carried in contemporary qualitative research is constructivism. In this chapter, constructivism and constructionism are considered interchangeable (see especially Ratner, 2006 or Berger & Luckmann, 1967; Burr, 2003; Kukla, 2000; Searle, 1995) since the proposed difference (see Patton, 2002, p. 97) between the two terms is not consequential in the broader context of the social sciences. Much of the literature shows that constructivism has come to be one of the major determinants of contemporary qualitative research (Charmaz, 2009; Lincoln & Denzin, 2003; Patton, 2002). Constructivism envisages research's results and involved assumptions as culturally, racially, historically, politically, sexually, and ethically constructed. The 1960s and 1970s have also been taken to be the classical beginnings of contemporary qualitative research with authors such as Glaser and Strauss (1967), Garfinkel (1967), and Blumer (1969). In the 1980s, the teaching of qualitative research began to gain mandatory status across curriculums. In the 1990s and 2000s the spectacular advances of information and communication technologies have brought into greater focus the complexity of an increasingly networked world and its challenging dilemmas such as a rise in poverty, natural disasters, ethnic conflicts, and incessant incurable illnesses, to name but a few, making qualitative research all the more valuable to a goal of deepening understanding and making the world a better place.

As should be now clear, qualitative research's rebuttals against positivism have carried different forms at different times since Bacon (1605/1960), although interpretivism has now come to serve as the generic term. After the debates that rocked methodology circles in the 1800s and onward, it is safe to state that the “-ism” terms and related schools employed in qualitative research literature can be best understood in light of or reaction against

positivism.¹¹ Benton and Craib (2001), Kincaid (1996), and Rosenberg (2008) offered some of the most invaluable sources of information about different methodological schools of thoughts in the social sciences. Interpretivism leans toward the idea of solid understanding. Constructivism insists on the fact that understanding is individually and collectively specific. Historicism focuses on socio-historical developments when understanding human actions. Naturalism seeks to understand targeted people and selected phenomena not in experimental and manipulated settings, but in their real-life context. These trends each have a particular flavor with which they formalize and envisage a theory. The awareness about the history behind the foundational assumptions that decisively, and too often, inconspicuously undergird our research processes is important in order to fruitfully engage in any discussion of theory construction. Frequently, research methodology textbooks have propelled fragmentary views of qualitative research's tradition (i.e., figures, schools of thoughts, methods, etc.) to the point that misunderstandings have accrued concerning qualitative research.

5. Misunderstandings around qualitative research

The key idea behind the misunderstandings that affect qualitative research resides in the belief that qualitative research is unfit for generalization. Without generalization, one cannot craft theories. "It is exact that the case study is a detailed examination of a solitary exemplar, but it is false to utter that a case study cannot grant unswerving information about the broader class" (Ruddin, 2006, p. 797). More clearly, without generalization, knowledge and its object (i.e., the world or reality) become meaningless. Flyvbjerg (2006) distinguished five most common misunderstandings concerning qualitative analysis.

Misunderstanding 1: General, theoretical (context-independent) knowledge is more valuable than concrete, practical (context-dependent) knowledge.

Misunderstanding 2: One cannot generalize on the basis of an individual case; therefore, the case study cannot contribute to scientific development.

Misunderstanding 3: The case study is most useful for generating hypotheses; that is, in the first stage of a total research process, whereas other methods are more suitable for hypotheses testing and theory building.

Misunderstanding 4: The case study contains a bias toward verification, that is, a tendency to confirm the researcher's preconceived notions.

Misunderstanding 5: It is often difficult to summarize and develop general propositions and theories on the basis of specific case studies. [emphasis in original] (p. 221)

The misunderstandings translate the efforts of different authors that have memorialized qualitative research's traditions, the most predominant of which was Aristotle's concept of context-embedded universal knowledge. We use case-derived generalization more than we think. Another common consequence of these misunderstandings is that qualitative research tends to be seen as synonymous with the social sciences and quantitative

¹¹ Further debate about positivism can be found in Habermas' (1968/1971, pp. 65-186) work. This work, in my view, exposes one of the strongest thrusts of positivism against common misrepresentations. For example, post-positivism should not be considered as identical to or representative of positivism (see Morgan, 2007, p. 61).

research with the natural sciences, respectively. However, this belief is not plausible. Quantitative research textbooks, materials, techniques, methods, software, and procedures come from the hard work of social scientists (Babbie, 2010; Lofland, Snow, Anderson, & Lofland, 2006). More specifically, social scientists have crafted techniques such as polls, sampling, and surveys, which have been serving as unparalleled authoritative and outstanding tools and guidelines for generalization and scientific rigor. Generalization is not incompatible with qualitative research. There are several reasons why generalization drawn from qualitative research can be useful, of which I have selected three most common.

First, generalization helps make sense of reality. As Flyvbjerg (2001) noted,

Without generalization, we could not interact with our world in a coherent manner – that is to say, we would need continual repetition of the same mental procedures for each new experience. One can often generalize on the basis of a single case, and the case study may be central to scientific development via generalization as supplement to other methods. (p. 425)

Knowledge comes through generalization. An essential point is that one can live without statistical knowledge, but one cannot function without generalization. Along the same lines, Little (1998) wrote, “a central claim is that social phenomena do not support strong generalizations, akin to laws of nature; rather, we find only weak, phenomenal regularities among social processes and entities” (p. ix). The claim loses ground on a number of levels and reflects a simplistic view of the social world. Popper presented powerful arguments against this claim (see Cibangu, in press). Among the myriad social phenomena that reveal rigid regularities are unemployment, mortality, housing, urbanization, transportation, inflation, group/crowd dynamics, etc. Consequently, “generalization can happen from any research method” (Lucas, 2003, p. 240). Generalization becomes a matter of reality. Particularly pertinent is the historian Gaddis’ (2002, pp. 62-66) idea of *particular generalization* and *general particularization*. Briefly put, particular generalization helps see generalization within particulars (narratives) whereas general particularization sees particulars as pointers to generalization. The idea shows how generalization without particularization, and *vice versa*, is impossible (see also Hellström, 2008; Niaz, 2007; Onwuegbuzie & Leech, 2010). The deeper the knowledge one has about a case, the easier it is to generalize that knowledge for a larger population.¹² It is no accident that another word for case in this context is example. And the qualifiers of case or example are concrete, specific, practical, etc. There is no such thing as an abstract and general example. The more concrete the case about a set of propositions is, the stronger the generalization of the propositions will be. This is where the widespread idea of weak generalization for qualitative research or the social sciences is defeated (Little, 1998; Rosenberg, 2008; Smith, 2003; Williams, 2000; Wallerstein et al., 1996). A weak example means superficial, not deep, knowledge. Note that generalization is not uniformization or denial of particularities.

¹² For further research on generalization in qualitative research, Brady’s and Collier’s (2010), Holland’s and Herstad’s (2000), and Gomm’s, Hammersley’s, and Foster’s (2000) works, to name a few, are recommendable.

A second reason generalization is useful is the research's contribution to the researcher's field. As Marshall and Rossman (2011) clarified,

In examining a specific case or set of individuals, the writer [qualitative researcher] should show how she is studying a case in a larger phenomenon. By linking the specific research questions to larger theoretical constructs or to important policy issues [general applicability], the writer shows that the particulars of the study serve to illuminate larger issues and therefore hold potential significance for that field. (p. 7)

This does not mean that any statement made in qualitative analysis has to be generalized, but that case-specific knowledge, obtained through research, has implications beyond a sampled pool of participants. Contribution makes theory valuable among scientists. A helpful terminology is one of wider resonance or significance. As Mason (2002) maintained,

There is a variety of ways in which generalizations can be made in qualitative research... You may well wish to derive cross-contextual generalities from strategically focused local/contextual studies. You may wish to make claims that have a *wider theoretical resonance* [emphasis mine]. (p. 39)

Wider resonance implies that applicability can be carried and shared across contextual boundaries and individualities. As was shown in the historical background, from Antiquity to 19th- and 20th-century authors, general theories have been drawn from case-specific knowledge and applied to the larger population. Some notable examples of theories that have been replicated to larger populations are Marx's (1867/1977) theory of class conflicts, Chomsky's (1965) generative grammar, and Piaget's (1926) theory of imitation and innovation, among others. Marx selectively observed a few companies in Germany, and generalized his theory to the rest of the world. Chomsky examined a few English native speakers within his reach in Philadelphia and generalized his generative grammar to all speakers in the world. Piaget observed his own three children and generalized his theory of imitation and innovation to all children of the world. Although these theories are not immune to criticism, they have, however, helped generate other theories, and have each become a momentous pillar of research in sociology, linguistics, and child psychology, respectively. None of these theories—or many others, from Ptahhotep (25th c. BC, Parkinson, 1991) to contemporary qualitative research just discussed above—has used a randomly selected representative sample, but rather a few cases deliberately selected in a naturalistic approach, which is characteristic to qualitative research.

The third and last argument for the use of generalization is that qualitative research has the ability to assess the extent to which controlled quantitative research can be applied in real world situations. Graziano and Raulin (2010) made clear that “case-study and naturalistic research can also enhance the generalizability of research findings, especially in areas in which the research has been conducted in laboratory settings” (p. 116). Statistical tests presuppose a laboratory-like research setting, the outcomes of which qualitative research aims to validate in the real world. Not only is generalizability germane to qualitative research, but it also needs qualitative research to fully unfold the real world.

A variant appellation of qualitative research's generalization is tied to the concepts of replicability and measurability, which are inherited from the Enlightenment Age (discussed above). It is widely believed that social phenomena are not as replicable/measurable as natural phenomena. Instances of replicable social phenomena, however, are numerous; to name a few: terrorist attacks, ethnic conflicts, murder, bankruptcy, mass protests (such as those in early 2011 in North Africa and the Middle East), etc. Measurability or quantifiability is another concept that is thought to be unfit for qualitative research. Sutton (1998) showed that there are certainly social phenomena that are quantifiable and others that are not. Examples of quantifiable social phenomena include population, democracy (see Freedom House website, <http://www.freedomhouse.org>), salary, famine, poverty, epidemic, etc. In the same way, there are also natural phenomena that cannot be replicated and/or measured. Astronomy abounds with examples such as movements of the universe, the collision of planets, the formation of Earth, etc.

Misunderstandings around qualitative research are also exacerbated by the tendency to equate qualitative research with just one method. In detail, qualitative research comprises the following methods: logic, ethnography, discourse analysis, case study, open-ended interview, participant observation, counseling, therapy, grounded theory, biography, comparative method, introspection, casuistry, focus group, literary criticism, meditation practice, historical criticism/research, etc. This list is by no means exhaustive, but it is common to limit qualitative research to one of these and similar methods. Furthermore, these methods can be conducted in deference to quantitative tradition. To illustrate, Morgan (1996, 1997) referred to quantitative uses of focus groups. However, by identifying the specifics of qualitative research one can ensure a broader view, clearer implementation, and fairer assessment of qualitative methodology's tradition.

6. Qualitative research's specifics

While qualitative research has been the object of extensive literature over the last several decades, its specifics have received only passing attention. The specifics of qualitative research provide an efficient tool with which to craft theories. On the one hand, there is a steady consensus among researchers "that the very term *qualitative research* means different things to many different people [emphasis in original]" (Denzin & Lincoln, 2005, p. xvii). On the other hand, the diversity behind varied suggested meanings of qualitative research reveals some commonly reflected features. In fact, authors have increasingly acknowledged that definite commonalities traverse the differing implementation of qualitative research (Denzin, 1997; Denzin & Lincoln, 1998, 2008a, 2008b; Flick, 2002, 2009; Knoblauch, Flick, & Maeder, 2005; Marshall & Ross, 2010; Maxwell, 2005; Patton, 2002; Silverman, 2010; Sutton, 1998; Tashakkori & Teddlie, 2003, 2010; Teddlie & Tashakkori, 2009). Recognition of commonalities, however, does not warrant the promotion of qualitative research's core principles. As Flick stated, "another result is that qualitative research is in danger of falling into different fields of research and methodological discussions and that in the process core principles and ideas of qualitative research across these different fields could be omitted" (2009, p. xxi). Even more challenging is the fact that, although it is a methodology in and by itself, qualitative research is oftentimes taught as an appendix to or sub-segment of quantitative research methodology. Moreover, while current university curriculums are

equipped with a whole department devoted to statistics and related positivistic tests, there is no such thing as a department of hermeneutics or casuistry and related methods entirely honed in qualitative research. Most qualitative research experts are either quantitative-trained professionals or ad-hoc specialists, both of which camouflage the specifics of qualitative research. This paper has selected four most important, not mutually exclusive, specifics or components that distinguish qualitative research as: (1) ethnographic, (2) contextual, (3) experiential, and (4) case-analytic.

First, an ethnographic component represents one of the most known, yet forgotten, specifics of qualitative research. The tendency is to relegate ethnographic work to anthropologists for the simple reason that ethnography is thought to require an excessive amount of site-immersion that an ordinary research timeline cannot afford. Whether it takes a long or short period of time for immersion depends on the researcher's stated priorities, but immersion remains the key defining feature of an ethnographic component—or, as others would argue (Becker, 1996; Silverman, 2010), of fieldwork. Experience shows that we do ethnographic work in our day-to-day lives more than is usually thought. How often do we involve all our senses and body in the setting of what we are talking about or what we want to learn or experience? People live with other people to gain a fuller understanding of other people's needs and lifeworlds. An ethnographic component requires the researcher to be immersed in the spatiality and temporality of the selected participants and their lifeworlds. Ethnographic qualitative research privileges the immersion into the participants' or case's real world and embedded experiences. Peshkin (1988) asserted,

This way [ethnographic research] enables us to bring, first, the complete range of our senses to our investigations; second, sufficient time in which to be attentive; and, third, the breadth of scope, that is, the fullness of what we are willing and able to attend to. (p. 416)

Our whole senses, attentive observation, and the fullness of the phenomenon studied all determine qualitative work. Note that the Baconian (Bacon, 1605/1960) doctrine, discussed earlier, rejects human senses as an impediment to knowledge acquisition. Qualitative research cherishes sense perception as the privileged portal to participants' or case's situated world.

The second component of qualitative research is the contextual component. The contextual component requires the researcher to speak as fully as possible to the particulars of participants' or a case's situated physicality. The term context can be applied to a variety of items such as word, proposition, argument, conservation, idea, book, etc. However, not everything that qualifies as knowledge is contextual or qualitative. Pertinently, context-specific knowledge lies at the heart of Aristotle's tenets. Aristotle (4th c. BC, 1924) explained,

For it is not man [in general] that the physician cures, except incidentally, but Callias or Socrates or some other person similarly named, who is incidentally a man as well. So if a man has theory without experience, and knows the universal, but does not know the particular contained in it [universal], he will often fail in his treatment; for it is the particular [man] that must be treated. (I, I. 981a)

Qualitative research *treats* knowledge that is context-dependent. Qualitative research deals with real-life context, present or past. The qualitative context is a context within which the

selected phenomenon or topic takes place and from which the qualitative researcher draws first-hand data of the study. Even in the case of a context that no longer exists (such as one that occurs with criminology, history, drama, art, text, etc.), qualitative research seeks to rebuild the real-life context and to draw findings as consistent with the original context as possible. This is where statistical data and their numerical outcomes are too insufficient to knit together and reignite the real world of the requisite context. Such an endeavor of reconstruction and enactment of the real-life world, within which participants' or a case's everyday existence burgeons, constitutes the proper domain of qualitative research methodology. In essence, contextual knowledge is one that allows a foreigner to go and live in the place being researched as easily as the natives.

The third qualitative research specific regards an experiential component. The experiential component provides the researcher with the spectrum of feelings, emotions, insights, views, beliefs, and values with which participants live in and interact with the real world. Qualitative research's component of experiential knowledge flows from hermeneutic and phenomenological circles. In a nutshell, hermeneutics concerns itself with the meaning of individuals' actions manifested in documents, texts, events, or social reality, whereas phenomenology studies the *Lebenswelt* (lifeworld) of human existence. French philosopher Ricoeur (1950, 1969, 1971, 1972, 1986a, 1986b, 1995) presented one of the best integrations of hermeneutics and phenomenology for the social sciences. It is questionable that, despite its immense academic legacy (including its use for linguistics, philosophy, semantics, ethics, theology, law, history, political science, literature, etc.) the Ricoeurian work has received little to no attention in social science and qualitative research literatures. With Ricoeur, social reality is seen as a universe of meaning(s) within and with which individuals share and experience the real world. Therefore, the researcher's immersion into and enactment of participants' lived experiences are central to qualitative research. This implies that qualitative research does not simply seek participants' experiences, but the shared meanings behind those experiences. In the same way, qualitative research does not simply seek participants' meanings, but the essence (such as common ground) or the world behind those meanings.

Pointing to experiential knowledge in slightly different words, Marshall and Rossman (2011) described qualitative research as research in which

analysis proceeds from the central assumption that there is an *essence* [emphasis in original] to an experience that is shared with others who have also had that experience. The experiences of those participating in the study – those who had a similar experience [who are, then, purposefully sampled] – are analyzed as unique expressions and then compared to identify the essence. (pp. 20-21)

As can now be understood, experiential knowledge obtained through research does not imply mere subjectivism and bias on behalf of the qualitative researcher, as is widely believed, but rich objective regularities systematically garnered from participants' lived worlds. Clearly, regularities are not a reserved seat of the natural sciences. As Aristotle (4th c. BC, 1924) put it so well,

It would seem that for practical purposes experience is in no way inferior to art; indeed we see men of experience succeeding more than those who have theory without

experience. The reason of this is that experience is [not only] knowledge of particulars, but *art of universals* [emphasis mine]. (I, I. 981a)

Experiential knowledge is the art that helps learn, discern, and grasp the universals, which in turn make one knowledgeable about life and others. Close textual analysis reveals that Aristotle used the Greek phrase καθ' ἑκαστὸν (*kath' hekaston*), which is commonly translated by the English word particular. Two distinct connotations of *hekaston* are worth-noting for our discussion. *Hekaston* means a single individual, every single one, each one. Aristotle did not use the word sample or section of a population for individual, much less larger population (for universal). Moreover, according to the long-standing authoritative English-Greek lexicon (Liddell & Scott, 1843/1996), *kath' hekaston* reflects an accusative usage that implies the sense of standard, norm, or order. The accusative connotation is thus translated as "in accordance with the particular," which implies the standards or patterns embedded in the particular. Aristotle was aware that lived particulars abound with regularities, the forces and patterns of which ought to be relived, brought to light, understood, and articulated as theories. Quite recurrent in qualitative research's tradition, the Aristotelian insight has become an often forgotten pillar of social science methodology: understanding the world and the self to control natural laws better. Social theorist Habermas (1993) wrote,

Enlightenment thinkers...still had the extravagant expectation that the arts and sciences would promote not only the control of natural forces but also the understanding of the world and of the self... and even the happiness of human beings. The twentieth century has shattered this optimism. (p. 103)

The Aristotelian view of science, art, and experiment, for which Enlightenment theorists fought, resists and challenges the modern statistical-fixed understanding of empirical knowledge and the non-objective consideration of human experience. The information age purports the Enlightenment's dream that knowledge is power with which to master the forces of nature and improve humans and their world. It is inexplicable that arts and human experience have been viewed as mere subjectivity, alien to and autonomous from universal empirical knowledge. At the same time, positivistic and statistical tenets have come to be seen as the only valid form of knowledge, devoid of and separate from subjective and artistic expressions.

Note that qualitative research is not a sensualistic, sentimentalist, lyricist, particularistic, or romanticist enterprise, although these elements can be part of the data collection process. The collection process is aimed at reporting the participants' sensations and experiences while employing a disciplined inquiry that is concerned with the patterns, laws, and regularities (hence objective dimensions) that undergird the participants' experiences and lifeworlds. "Qualitative research, however," explained Marshall and Rossman (2011), "is neither subjectivist nor biased (all too common criticisms)" (p. 5). It becomes clear that the dichotomy between objective and subjective is inappropriate for qualitative research's identity. It is often argued that qualitative research is subjective (Myers, 2009), whereas quantitative research is objective. It is also reasoned that qualitative research derives information from the subjective experiences of the participants and quantitative research yields the objective numerical dimensions the phenomenon of interest. As argued above, while these propositions can be true, they lead to undue oversimplification of qualitative research.

The fourth and last specific aspect of qualitative research is its case-analytic component. Case-based analysis is one of qualitative research's most important features. A case-analytic component requires the researcher to unpack the patterns and forces beneath the essence embedded in the case being studied. Common to case study is the confusion about the term case itself. Despite its merits, for example, renowned methodologist Yin's (2009) recent "definition of a 'case' being... a concrete entity, event, occurrence, action, but not an abstract topic such as a concept, argument, hypothesis, or theory" (p. x) is one of the many statements that confuses qualitative research's readers. A thorough review of Yin's oeuvre raises significant questions as to the assumptions beneath the definition given above. While Yin (2009) acknowledged that "[his] book does not cover all uses of case studies" (p. 4), his definition of a case pretends to concern all case types. Perhaps more interestingly, Yin (2003) claimed to be dealing only with the genre of case studies related to organizational and institutional phenomena, without denying the importance of other genres of case studies. In the meantime, Yin's proposed definition (2009) remains one of the most commonplace definitions of case study in research methodology curriculums.

For example, one can perform a case study, so to speak, on a hero to resolve a nation's crisis. One can perform a case study on a rock on the seafloor to see how to strengthen concrete to avoid oil spillage. One can perform a case study on the September 11 attacks in the US to enhance hospitals' readiness. One can perform a case study on the concept of how comfort can heal and strengthen the depressed and brokenhearted. One can perform a case study on a criminal's argument to protect the vulnerable in a neighborhood. One can perform a case study of a hypothesis to improve a domestic appliance. One can perform a case study on a theory to improve research in a specific field. In each of these instances, the deeper the knowledge that the case uncovers, the better the result. As has now become clear, case studies have the potential to involve any topic, depending on the questions raised by the research and the methods used.

Having clarified what constitutes a case, we now need to clarify what characterizes a case study in the qualitative research sense of the term. One of the most indicative features of a case study is thick description. Meanwhile, qualitative research has come to mean any descriptive study, and the ways in which the term descriptive, or description, has been implemented and evaluated remains unclear. Geertz (1973/2000), it should be underlined, is the social exemplar who, in importing interpretive sociology's principles (see Simmel, 1908; Weber, 1972) into anthropology, has made description one of the cornerstones of qualitative work. It is no accident that Geertz (1973/2000) spoke of *thick* description, an important precision that is inexplicably off-sided when it comes to regarding qualitative research as descriptive. In other words, not every description or descriptive study is qualitative or a component of qualitative research. Commonly attributed to Geertz (1973/2000), but originated by 20th-century British philosopher Ryle (1968/1996), thick description aims not to simply articulate the properties of an object, event, or case in and by itself, but to unearth the hidden patterns of essence beneath the object by deriving "the stratified hierarchy of meaningful structures" (Geertz, 1973/2000, p. 7) or by "sorting out the structures of signification" (p. 9). Thin description, however, has nothing to do with the structures and patterns deep-hidden beneath the phenomenon, but provides one easily seen layer of meaning (e.g., size, percentage, frequency, etc.), which "is a surface expression" (p. 17) of

that which is being studied. Put clearly, the more strata of meanings one pulls out, the thicker the description of the selected case is, and the deeper the obtained knowledge. Thick is another qualifier of deep understanding. To be thick and deep, one has to have as many layers as possible. One layer constitutes a thin or surface understanding (e.g., numbers).

Qualitative research's specifics provide us with a clearer grasp of theory contribution. While researchers diagnose the whats, hows, wheres, whens, whys, and whos within a given literature to capture the relationships leading to a theory, they can use qualitative research's specifics to craft firmer theoretical contributions to their fields. A theory that does not immerse in the real world, re-enact the real context, capture the regularities hidden behind lived experiences, and/or provide a thick description of that which is being studied cannot fully account for the whats, hows, wheres, whens, whys, and whos involved in literature. Numbers alone are only a fraction in this endeavor.

7. Practical consequences

This chapter is not proposing a one-size-fits-all formula of theorizing in the social sciences. However, with its largely neglected traditions and theory construction, qualitative research constitutes a tremendous tool of theorization. The belief that theory is an anti-thesis to reality can lead to a notion of theory conceived as incomplete without a specific practice. In addressing the elements of theory: whats, hows, wheres, whens, whys, and whos, researchers achieve a potent grid of not only application, but evaluation. The evaluation of theory should also consider the use of and responsiveness to qualitative research traditions on the one hand, and the specifics of qualitative research on the other hand. Failure to undertake a well-informed account of theory in the social sciences will only perpetuate the misunderstandings outlined above.

The description of the misunderstandings does not seek to assert that qualitative research is the best methodology and the full-fledged generalization toolkit, but rather it advocates for greater awareness about the potentials of qualitative research and its role in contributing to a more informed research process. Equally, the four specifics of qualitative research supplied above are not intended to be comprehensive, but rather to work as a blueprint of how and why to apply, evaluate, and make theoretical contributions in the social sciences. This memo is not an empirical applied study that prescribes and summarizes recipes of qualitative research for the social sciences, but it is an invitation to find a tighter contributive grasp of qualitative analysis among the social sciences. No one can make the necessary contributions without a firm grounding in the wealth of various theorists with which qualitative research's history teems.

8. Conclusion

Familiarity with qualitative research's tradition takes social scientists to several untapped areas with which to craft theories. Theory is a tool with which to gain a handle of reality. Some of the pitfalls to be aware of are the drive for local particularities, the privileging of the idea of general truths, an enmity between the natural and human sciences, a pursuit of sentimentalism or subjectivism, an over-strict limitation of interpretivism to text or meaning, etc. Practicalities are left to the discretion of researchers as localities vary widely. Qualitative

research is an art of deeply understanding or enacting ideas, feelings, objects, individuals' experiences, and social phenomena. Qualitative research seeks not only to understand others, but also to allow others to be understood. It can be argued that the deeper the social sciences' knowledge of qualitative research is, the better is the understanding of our lifeworlds and nature.

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