In the Field: Cases of Bringing 'Access' to the Forefront on the International Business and Management Research Agenda

1. Introduction

'Access' to organisations, institutions, and individuals can determine the stand or fall of the research. It is a crucial element beyond the full control of the researcher. In this paper, the authors acknowledge the challenges which can arise during a qualitative field-research and will provide lessons learned as well as a guide to how to seek 'access' in Multinational Enterprises (MNEs) and to individuals in non-organisational communities. The planned research is often based on an ideal research design, which may pan out very differently in reality. In IB and management methodology textbooks and in research in general, the focus on 'access' is diminutive. Chiefly, it makes brief references to accessing physical space which field-researchers cannot assume open access to – a territorial understanding of the term. The authors use experiences acquired from conducting field-research to advantageously approach 'access' as a social phenomenon.

This paper presents field-experiences as two cases. The first author investigates headquarter-subsidiary knowledge transfer processes in Swedish MNEs. The employed case-study methodology includes field-research in China and Sweden with a total duration of six months. The second author conducted a five-month ethnographic field study of Scandinavian expatriates in Hong Kong SAR as a holistic, social phenomenon in regard to perceptions of intercultural encounters and adjustment experiences, predominantly on the individual level (see Guttormsen 2009).

'Access' is a highly personal activity. Factors such as emotions, culture, and intersubjectivity, in addition to social and language skills can substantially influence the success or failure in securing 'access'. The entanglement of the researcher (as a social being) in the actual 'access'-seeking process is an important matter to discuss due to the vast range of ways in which this involvement may influence the outcome. A plausible explanation for why the role of field-researchers is seldom addressed may relate to the fact that often researchers are located outside the "objectivists' ontological awareness-span" in mainstream, positivist rooted quantitative IB research. The findings in this paper reveal that 'access' can be understood as a social phenomenon in addition to a multi-level and multi-dimensional conceptual term.

2.0 Literature

Despite being a multifaceted issue that is highly influenced by an array of intersubjective and personalised aspects, the critical issue of 'access' has received little attention on the IB research agenda – and beyond within business-academia. The IB literature is saliently rooted in a positivist research paradigm, which permeates most areas of the IB research agenda (see Bate 1997; Buckley & Chapman 1996a, 1996b; Casson 1996; Chapman 1997; Lauring & Guttormsen 2010). In this tradition, where objectivity is adamantly manifested as science proper, it is inevitable that the role of the researcher is neglected as he or she is assumed to be aloof to both the research process and the research subjects.

'Access' can also be thought of as an epistemological and methodological issue, for example in the pursuit of achieving "methodological fit" (Edmondson & McManus 2007). Consequently, the type and nature of 'access' sought by a researcher must be consistent with other internal elements in the research design. However, 'access' is also an external factor where the lack of it may hamper the feasibility of the research project itself. As the eminent scholar and father of cross-cultural research Geert Hofstede postulated:

> "I mean, if you have an Uncle who is the director of a race course in Hong Kong, you may decide to do a study of race courses. Because by this specific fact, you have access to data nobody else has. So, do this and look at your assets and liabilities" (Carraher 2003, p. 103).

There are consummated exceptions to the silence in IB research concerning 'access' issues in the *Handbook of Qualitative Research Methods for International Business* (eds Marschan-Piekkari & Welch 2004). For example, Macdonald and Hellgren (2004) highlight that the organisational and informational hierarchies within firms cannot be assumed to be identical; senior managers may not always possess the most relevant knowledge on a particular topic. Furthermore, Chapman, Gajewska-De Mattos, and Antoniou (2004) showcase several issues relating to field-researchers' personal backgrounds and how these inescapably influence intersubjectivity and interpersonal interaction in the field.

Thus, increased attention in research methodology to the issue of ‘access’ is argued to be both relevant and necessary as both students and academics as well as consultancy practitioners and managers can draw upon the experiences of other researchers. This may provide them with additional learning, which can be useful in future research endeavours and the execution of projects.

3.0 Discussion framework

In this paper, the authors have utilised a practical hands-on mode of academic collaboration as a means to address the main research question: How did the authors experience and tackle challenges in terms of gaining appropriate ‘access’ during their field research in China? Their relevant field-research experiences will be presented as two cases (one per author) derived from having executed more than 60 in-depth interviews each in China. They faced diverse challenges when seeking and securing ‘access’ in China.

The authors refer to the employed discussion framework (i.e. transferring field-research experiences) as a ‘dialogical’ methodological approach. Firstly, the authors identified commonalities between their field-researches so that they suffice for being juxtaposed (i.e. Chinese cultural context, both researchers sharing a Scandinavian socio-cultural and linguistic background, and conducting qualitative field-research). Secondly, it was agreed that the collaboration could contribute significantly towards two main areas of learning and materialisation of knowledge. For example, juxtaposing his or her own field-experiences with the ones acquired by the other researcher could not only enhance general knowledge but also result in transparency and improved self-reflexive reflections. This proved to provide a much deeper understanding of acquired experiences and awareness of relevant, but dormant, ‘access’ issues in his or her conscious. In practical terms, this was carried out by both authors writing lengthy documents about their personal field-experiences in regard to ‘access’, swapping them, and subsequently commenting on each other’s experiences and reflecting on their initial statements. This paper is the materialisation of this ‘dialogical’ process.

4.0 In the field seeking ‘access’

The case-studies, which illustrate field-research experiences in regard to grasping the multifaceted issue of ‘access’, can be categorised into various phases, dimensions, and levels (albeit not in a taxonomical sense).

4.1 Personalised dimension

Because field-researchers are to various extents are integral to the research process (see Sanday 1979), the authors’ personal capabilities and backgrounds became an extremely important factor to reflect on. Qualitative researchers cannot solely be guided by what positivists affectionately refer to as “theoretical gaps” when delineating the research problem of a new project. The former group of researchers must also take into account their own personas and personal abilities. This becomes increasingly important when being an ethnographic researcher due to the longitudinal nature of the research (for example, close social interaction/observation with research subjects, and higher requirements for achieving a more comprehensive meaning- and context-based understanding as a ‘native’). A quantitative researcher investigating, let us say, US Inward Foreign Direct Investment to Malaysia by analysing secondary data from Thompson One Banker with a regression analysis, is likely to face less personalised issues. Consequently, here, ‘access’ constitutes a mere technical factor.

Most of the personalised factors played out beyond the full control of the field-researchers. This was a result of intersubjectivity and the fact that respondents interpreted the persona and background of the researcher in different ways. How to dress when interacting with research subjects was carefully planned by both researchers. In the first case, the author considered ‘access’ and the interview sessions as a very formal situation, which demanded formal attire. She experienced being invited to formal business lunches and dinners, as well as other professional and corporate events. This enabled her to network effectively and subsequently meet potential interviewees. This author also emphasises the importance of building a network with contact persons and interviewees in MNEs after establishing trust. They might assist with introductions to people of interest in terms of the research, if they choose to, within the organisation and beyond. Building trust after establishing contact also became necessary as these ‘gatekeepers’ have the authority to grant ‘access’ into their company. They do not get paid for it and often lack the time to interact with researchers. Thus, it is up to the researcher’s persona and skills to prove what the firm can gain from partaking in the research. For example, the researcher may be willing to spend time in the organisation at no additional cost whilst carrying out research of some kind with prospects of presenting findings and propose managerial implications. This type of consultancy work is often of interest to firms if they deem the research topic interesting.

In the second case-study, the author dressed ‘casual smart’ as a means to avoid being too underdressed in an office environment, but not too overdressed for meeting at a cafe. This enabled him to easily move between various interview-sites and also to be prepared for sudden changes of locality or being invited for a meal or drink in a professional environment. This was especially helpful when interacting with expatriates from non-corporate sectors. Stereotypically, for example, being dressed as a “financial investor” in a remote suburb of Hong Kong might cause interviewees to feel less inclined to divulge all their personal thoughts about corporate expatriates as the Other. The author was advantaged by employing his skills as an organist which positioned him to meet new people, experience the Scandinavian community from the inside, and on a more personal level, to make friends within the Scandinavian church community and beyond, which benefited both his research and his social life.

4.1.1 Administrative aspects

Whilst carrying out longitudinal field-work, researchers are not merely conducting research but also solely responsible for all administrative and management tasks which come with it. This is particularly salient for postgraduate researchers who suddenly find themselves removed from their offices and indeed from regular supervision. Furthermore, they need to quickly adapt to an unfamiliar cultural environment, which poses additional challenges because of the pressure to complete the de rigueur research within a limited timeframe and budget.

The significant amounts of time which needs to be allocated to administrative side of things are seldom highlighted in textbooks or elsewhere. For example, in the first case, the author was faced with the challenges of coordinating interviews at ten subsidiaries located in different cities and provinces in China. This required the organisation of a complex itinerary featuring multiple flights, trains and accommodation locations but with very little room for flexibility after finalising the schedule. Sometimes, interviews were postponed for days - even weeks. It is pivotal to be aware that the targeted professionals frequently travel on a tight time schedule, in particular those employed by MNEs. Depending on the size and scope required for the particular project, it is advisable to estimate around 3-9 months for establishing and securing access, in addition to factoring in additional time in case of changes, to ensure that a sufficient number of interviews are obtained. Post-interview, it is important to acknowledge the interviewee’s contributions and interest in the research, for example by a postcard.

Similarly, in the second case, the author reports that almost one working day per week was spent on administrative related tasks ranging from contacting people, maintaining contact whilst approaching new ones, keeping a diary of interview appointments with contact details, planning where and when to meet, distributing interview material to respondents, and recording background details, in an ever continuing circle. Indeed, this work onus drew attention away from the research and must be carefully considered by researchers in terms of planning the field-work endeavour.

4.2 Physical dimension

The physical dimension of ‘access’ is what is normally discussed - a physical boundary (for example a firm’s building) where field-researchers must seek permission to enter. This was indeed the everyday-reality in the first case, for example through personal networks or cold calling. Emails, letters, and telephone calls, or a combination of them, were very much used. Researchers need to identify who in the target firm they want to reach, that is name and title. The initial person serves as a gatekeeper and decides what and who to forward - or not. When it was not known who was the best person to speak to, the author often experienced being randomly forwarded by the initial person in the hope of identifying the appropriate person.

Due to the uncertainty associated with this process, researchers must seek all possible ways of securing ‘access’. The author used up to twelve different ways in her effort to secure access to a

MNE, for example contacting the Swedish headquarters, contacting different affiliated subsidiaries in China, attempting to identify employees working there, sending emails to different addresses, and making telephone calls. Sometimes she found that one person would accept her request for ‘access’, but that she was turned down by another individual within the same organisation at a later stage. Thus, locating the person with the appropriate authority to make this decision is crucial. Eventually, it all comes down to introducing yourself and the research topic in an attractive way. The benefit to the company should be underscored. Moreover, introduction letters should be kept as short as possible considering the busy schedules of those receiving them. Normally, it is not part of their normal workload, and researchers must therefore succeed immediately in attracting their interest. To avoid confusing employees with cumbersome academic language is important. A polite, formal, and professionally written letter is preferred.

In the second case, the author was to a much lower degree exposed to the issues of physical access to firms. His research focused predominantly on expatriates as individuals and members of a perceived Scandinavian “expat-community” rather than being constrained to a physical area or processes within firms. This facilitated approaching individuals directly at social events outside “organisational communities” and acting on informal introductions to potential interviewees. This did not mean, however, that firms were not part of the research. For example, when interviewees discussed intercultural issues, experiences at work became a very normal thing to talk about. Moreover, the individual and organisational levels cannot be taxonomically demarcated. The author also approached firms as part of his “snowball” and “reflexive” sampling approaches (see Guttormsen 2009), but did so in an attempt to locate individuals in the capacity of being expatriates as opposed to representatives of the firm. Participation was also elicited by “advertising” the study in Scandinavian publications and through relevant organisations in Hong Kong.

‘Access’ is thus also a result of flexibility on the part of the researcher and the ability to work around interviewees’ commitments, an approach which the author experienced success with. He would set up in-depth interviews when most convenient to the respondents regardless of locations (which ranged from an office to somebody’s home) and time (within or outside office hours, including weekends). In Hong Kong, work hours often last to 9 pm (in addition to Saturdays). Hence, a tenacious “Scandinavian 9–4 pm” work attitude would be a disadvantage. This also challenged his stamina and his ability to concentrate, for example if conducting interviews at 9 am, 12 noon, 4 pm, and 8 pm in several languages (i.e. Danish, English, Norwegian, and Swedish) and having to travel across the Territory. Two interviews per day is an advisable maximum. Additionally, knowing all questions by heart also assisted the second author in conducting interviews where sitting down was not possible. For example, on one occasion an interview had to be terminated after 10 minutes as the interviewee’s baby was reluctant to fall asleep. But because she kindly welcomed the author to accompany her when walking to the next location approximately 40 minutes away, the author was able to obtain a full interview after all by continuing the conversation whilst sauntering across the Central Business District with a trolley and his digital audio recorder. In other words, the work culture of the researcher is an influential factor in terms of gaining ‘access’.

Flexibility is also an issue of shortage of time. The first author observed that firms often did not want to spend too much time on a researcher. She found that a contact person in a firm would email her the day before the arranged interview requesting to shorten the duration of the interview due to lack of time. There was nothing she could do other than express appreciation of the situation and try her best to accommodate the changing circumstances. Furthermore, interviews and meetings can be delayed because of absence and urgent business matters. As experienced by the second author, flexibility is also an issue in terms of deciding when to stop pursuing an ad-hoc interview appointment if it does not seem to be materialising.

4.3 Socio-cultural’ dimension

This sub-section focuses particularly on linguistic and cultural aspects, which cannot be separated because language constitutes a sub-system of culture (Keesing & Strathern 1998). It can be understood as socially and historically constituted along with other human practices (Bourdieu 1977, 1991). The linguistic capabilities and cultural backgrounds of both researchers played an essential role when seeking desired ‘access’. It can be argued that the understanding of ‘access’ should not only revolve around its physical description (i.e. as a site or firm). It should be approached as a social phenomenon, as successful ‘access’ depends on personality and social skills as depicted in the ‘personal dimension’ sub-section. It is also important to reflect upon socio-cultural attributes as many of them do not relate to skills which can be altered. For example, a field researcher cannot construct herself as a man if she is a woman – nor can researchers control how research subjects perceive their encounters with the researcher. This may have important implications for gaining ‘access’. For example, a female sales director might feel more comfortable talking about gender issues in an MNE or about family adjustment with a female interviewer. And perhaps a male managing director might feel more comfortable talking to an interviewer with a similar business education dressed in a suit rather than a young researcher wearing an anti-globalisation t-shirt and a Palestine scarf.

Similarly, researchers need to consider whether to write letters and emails in English when approaching an organisation/firm, when using the local dialect or their own “Scandinavian” language. In the first case, the author who is a native Swedish speaker decided to conduct all contact in English when liaising with Swedish headquarters back home and when seeking access to subsidiaries in China because of the possibility that emails would be forwarded to a non-Swedish speaking employee. Swedish employees would know by looking at her surname that she was Swedish, and could therefore instigate a two-way discussion in Swedish if they preferred - as many of the Swedish expatriates did. In the second case, the author found that “sharing nationalities” with his research subjects helped him tremendously with gaining ‘access’ more easily due to being defined as in-group and thus having “natural access” to events organised for Scandinavians. He also experienced a collective spirit of “we are helping out a fellow country-man”.

However, ‘access’ should not be considered solely as an issue of locating relevant research subjects. It also suggests a highly sophisticated ability of researchers to access information – to comprehend process, analyse, and interpret obtained data in the most effective way. This way, the ‘total universe of data’ (see Miles & Huberman 1994) can be treated more accurately and authentically according to the intended transfer of meaning by the interviewee. This was the main reason why the second author chose to investigate Scandinavian expatriates (i.e. being socio-culturally emic with the informants due to his native Norwegian language in addition to having excellent understanding and conversational skills in Swedish and Danish). Thus, he was especially well equipped to grasp nuanced meanings, contextuality, and the respondents’ ‘native categories’ (see Buckley & Chapman 1997), which are focal points in ethnographic research (Hammersley & Atkinson 2007). This enhanced his social analysis by drawing upon an already in-depth understanding of the research subjects’ cultural backgrounds, which signifies an important part of contextuality and intersubjectivity. The latter is paramount as human beings construct their meanings, perceptions, and social reality within the contextual framework, and are constructed by it (Crotty 2003). This abstract/immaterial nature of accessing contents relates to not only human subjects but all types of collected data.

5 Conclusion

‘Access’ as a methodological issue has been under-researched in the IB literature, as well as in cognate areas. The authors have not only discussed the importance and challenges in regard to ‘access’, but also suggested a new way of exploring this issue during field research. It is advisable to discuss levels of access in empirical research where the multi-faceted nature of ‘access’ is evident. The main contribution of this paper is to institute the academic discussion in IB and management research and share experiences from the field relating to ‘access’. The paper suggests that it is insufficient to merely refer to the type of ‘access’ which has been secured in academic research papers and methodology textbooks. The authors suggest that a more holistic discussion is needed in order to fully comprehend the nature of ‘access’. Providing transparency concerning ‘access’ as multidimensional and as a social phenomenon should be part of any self-reflexive deliberations in order to improve the internal validity, trustworthiness, and credibility of the research (see Bryman & Bell 2003; Cunliffe 2002; Easterby-Smith, Thorpe, & Jackson 2008; Sinkovics, Penz, & Ghauri 2008). Consequently, ‘access’ is a highly personalised issue beyond the mere notions of physicality and technicality, but indeed entails substantial impact from an administrative and socio-cultural perspective. This applies not only to locating research subjects but also to being able to engage with information imparted by research subjects, written material, and contextuality in the most effective manner.

For future research it would be interesting to explore how socio-cultural aspects may diverge in different parts of the world, and how ‘access’ is influenced by locality and different cultural environments. The levels, phases, and dimensions of ‘access’ in concert can be argued to warrant the development of an ‘access’ model. In this paper, the authors have examined field experiences of two academic researchers presented as two cases; these experiences are different in character due to focusing on different levels of access - the individual and the organisational. Yet, they serve as complementary sources of accumulated learning as they highlight different perspectives of conducting qualitative field-research. The authors dealt with ‘access’ on the international stage where the challenges of ‘access’ are more salient compared to the national arena due to the cultural dimension. The paper, however, only addresses ‘access’ issues as encountered by the two authors within their respective field-research endeavours in China. Thus, there are many additional ‘access’ issues yet to be illuminated in various contextualities.

References

Bate, S.P. (1997), “Whatever Happened to Organizational Anthropology? A Review of the Field of Organizational Anthropology and Anthropological Studies”, *Human Relations*, Vol. 50, No. 9, pp 1147-1175.

Bourdieu, P. (1977) *Outline of a Theory of Practice*, Cambridge University Press, Cambridge.

Bourdieu, P. (1991) *Language and Symbolic Power*, Polity Press, Cambridge.

Bryman, A. and Bell, E. (2007) *Business Research Methods*, 2nd edn, Oxford University Press, Oxford.

Buckley, P.J. and Chapman, M.K. (1996a), “Economics and Social Anthropology - Reconciling Differences”, *Human Relations*, Vol. 49, No. 9, pp 1123-1150.

Buckley, P.J. and Chapman, M.K. (1996b), “Theory and Method in International Business Research”, *International Business Review*, Vol. 5, No. 3, pp 233-245.

Buckley, P.J. and Chapman, M.K. (1997), “The Use of Native Categories in Management Research”, *British Journal of Management*, Vol. 8, No. 4, pp 283-299.

Carraher, S.M. (2003), “The Father of Cross-Cultural Research: An Interview with Geert Hofstede”, *Journal of Applied Management and Entrepreneurship*, Vol. 8, No. 2, pp 98-107.

Casson, M. (1996), “Economics and Anthropology – Reluctant Partners”, *Human Relations*, Vol. 49, No. 9, pp 1151-1180.

Chapman, M.K. (1997), “Social Anthropology, Business Studies, and Cultural Issues”, *International Studies of Management & Organization*, Vol. 26, No. 4, pp 3-29.

Chapman, M.K., Gajewska-De Mattos, H. and Antoniou, C. (2004), “The ethnographic international business researcher: Misfit or trailblazer?” in *Handbook of Qualitative Research in International Business*, eds R Marschan-Piekkari & C Welch, Edward Elgar, Cheltenham, pp 287-305.

Crotty, M. (2003) *The Foundations of Social Research: Meaning and Perspective in the Research Process*, Sage, London.

Cunliffe, A.L. (2002), “Social poetics as management inquiry: A dialogical approach”, *Journal of Management Inquiry*, Vol. 11, No. 2, pp 128-146.

Easterby-Smith, M., Thorpe, R. and Jackson, P. (2008), *Management Research*, 3rd edn., Sage, London.

Edmondson, A.C. and McManus, S.E. (2007), "Methodological Fit in Management Field Research", *The Academy of Management Review*, Vol. 32, No. 4, pp 1155-1178.

Guttormsen, D.S.A. (2009), “Institutions of Scandinavian expatriatism in Hong Kong: A dynamic perspective on interaction and adjustment”, *LEWI Working Paper Series*, No. 91.

Keesing R.M. and Strathern A.J. (1998) *Cultural Anthropology: A Contemporary Perspective*, 3rd edn., Thomson, Belmont.

Lauring, J. and Guttormsen, D.S.A. (2010), “Challenges of ethnicity in organizational interaction: The role of language use”, in *Ethnicity: Cultural roles, Spiritual Practices, and Social Challenges*, Nova Science Publishers, New York.

Macdonald, S. and Hellgren, B. (2004), “The Interview in International Business Research: Problems We Would Rather Not Talk About”, in *Handbook of Qualitative Research in International Business*, eds R Marschan-Piekkari & C Welch, pp 264-284.

Marschan-Piekkari, R. and Welch, C. (2004) *Handbook of Qualitative Research in International Business*, Edward Elgar, Cheltenham.

Miles, M.B. and Huberman, A.M. (1994) *Qualitative Data Analysis: An Expanded Sourcebook*, 2nd edn., Sage, London.

Sanday, P.R. (1979), “The Ethnographic Paradigm(s)”, *Administrative Science Quarterly*, Vol. 24, pp 527-538.

Sinkovics, R., Penz, E. and Ghauri, P. (2008), “Enhancing the Trustworthiness of Qualitative Research in International Business”, *Management International Review*, Vol. 48, No. 6, pp 689-714.