

# COLLECTIVE CASE STUDIES AND RESEARCH PROCESSES – HOW DO RESEARCH TEAMS TACKLE THE DYNAMICS?

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International research collaboration is often regarded as a ‘quick fix’ to access (local) data and contextual knowledge. Research teams are common in analysis of business networks too, following the example of the IMP1 (Håkansson, ed., 1982) and IMP2 (e.g. Snehota & Håkansson, 1995) research projects. Yet few scholars discuss experiences of teams in conducting case studies or ponder how teamwork is suited to case analysis. The issue of team work as a methodological challenge and potential in business network analysis has recently been raised (Salmi 2010), but more work seems to be needed to understand the analytic character of team work and how this potentially influences case studies in the area.

The aim of this paper is to analyze and compare four instances of case research in order to make some initial general claims on how to do case research in teams. My key arguments are that the diversified resources of a team ought to be used to conduct case *analysis* that fully accounts for the pitfalls and opportunities of team work, and that to this end, the team should pay more attention on the *processes* involved in collaborative case studies. The paper is based on earlier literature and on four examples from teams conducting case studies in the area of business networks.

The contribution of the paper is to suggest three types of collective case studies: independent cases, shared case(s), and joint case(s). Depending on the case type, collaboration within the team is different, and in particular, there is variation in what issues/practices become shared within the team. This is bound to affect the case processes and outcomes. The dynamics of networks and interaction have earlier been raised as a challenge in network studies (Halinen and Törnroos, 2005; Dubois and Gadde, 2002; Medlin 2004), but this paper shows that, in addition, the dynamics of team work brings along new processes, relating e.g. to the interaction, coordination and integration within the team, which affects how our network cases unfold.

Keywords: case analysis, time, dynamics, research team, abduction

## INTRODUCTION

International research collaboration is common and team work is often adopted in analysis of business networks too, following the example of the research projects IMP1 (Håkansson, ed., 1982) and IMP2 (e.g. Snehota & Håkansson, 1995). In the international context in particular, scholars tend to regard collaboration as a ‘quick fix’ to access local data, contextual knowledge and/or multiple network actors. Yet few scholars ponder how team work is suited to case analysis or even discuss how it is really conducted. For instance, the iterative nature of a case study may well contradict the coordination needs of teamwork. Often, the most trivial features of collaboration (such as, access to different research sites) are the main motivation for the joint effort, and (too) often joint decision-making concerns only the practical, operative aspects of research, rather than the joint analytic work (Salmi, forthcoming). Indeed, there seem to be few guidelines for conducting case studies collectively.

This paper reflects on the implications of having a team as opposed to a single investigator carry out and analyze a case study. My key arguments here are that the diversified resources of a team ought to be used to conduct case *analysis* that fully accounts for the pitfalls and opportunities of team work, and that to this end, the team should pay more attention on the *processes* involved in collaborative case studies.

In particular, I shall refer to the case study approach that is based on abduction. This (alternative) view to case studies has been gaining momentum in management and network studies (Dubois and Gibbert 2010). The case approach adopted here builds on the inevitable interaction of theory and method, and on the back-and-forth character of the research process (Ragin 1992; Van Maanen et al. 2007), and thus acknowledges an evolving framework and an evolving case (Dubois and Gadde 2002). Having a team working on the case(s) brings along new processes, relating e.g. to the interaction, coordination and integration within the team. This paper thus investigates a setting where research dynamics relate both to the method/object (case) and subject (team) of the study. In this setting, abduction seems to become critical for the collaborative investigation: how the team conducts analysis, i.e. matching of the concepts and empiria over time is bound to affect the outcomes too. The aim of this paper is to analyze and compare four instances of case research in order to make some initial general claims on how to do case research in teams.

The paper is organized as follows. The first section illustrates how the existing literature on research collaboration tends to assume relatively linear research processes and to concentrate on quantitative projects, and rarely discusses teamwork in case studies. The second section discusses the abductive approach and the potential implications of flexibility and emergence for case work in a team. So far, detailed accounts of how teams have tackled collaborative analysis are lacking, and therefore, the third section draws on my own experiences of collaborative case study projects. It sheds light on the research processes by way of looking at four different examples. In the discussion section I suggest three types of collective case studies: independent cases, shared case(s), and joint case(s). Depending on the case type, collaboration within the team is different, and in particular, there is variation in what issues/practices and how become shared within the team. This is bound to affect the

case processes and outcomes. The paper ends by suggesting that case teams should pay more attention to these in the future.

## PRIOR LITERATURE ON RESEARCH COLLABORATION

Writings on team work in general are abundant. Several articles discuss how best to conduct research in teams but most of this discussion assumes a quantitative research project. Still, these normative and practical accounts provide guidance on how research teams are typically seen to work.

The literature so far has paid most attention to team constellation. The focus has been on how the make-up of the team influences project success (Nason and Pillutla 1998; Segalla 1998; Teagarden 1998). Diversity has attracted a particular interest, and in general, it is suggested that heterogeneity is needed to execute the complicated research task successfully (Nason and Pillutla 1998). Publication policies and reporting are discussed, often in connection with the career stage and thus motivation and skills of different researchers in the team (Milliman and Von Glinow 1998; Teagarden 1998; Peterson 2001). Scholars have also looked at how institutional background and varying research views influence teamwork. Increasingly, the effect of different research paradigms and cognitive referential systems is pondered, noting the need for open discussion of different paradigms (Milliman and Von Glinow 1998; Sauquet and Jacobs 1998; Turati, Usai and Ravagnani 1998).

Another stream of the literature looks at the processes of team research; modelling the process of cooperation (Teagarden et al. 1995) or suggesting a life-cycle model, that is, a relatively linear process of research (Bournois and Chevalier 1998). The widely cited model of research cooperation outlined by Teagarden et al. (1995, p. 1281) covers different stages of the research endeavour, that is, inputs, interactions and outcomes, with a strong focus on project management. Furthermore, the literature discusses coordination of research projects (Geringer and Frayne 2001; Peterson 2001; Turati, Usai, Ravagnani 1998). Often, these papers suggest the need for a clear leadership by one or few researchers – ‘project champions’ – to coordinate the process (Geringer and Frayne 2001; Teagarden 1998). The team leader is seen as responsible for synthesizing the teamwork (Stake 2005). In general, the writings so far seem to reflect a process where the analysis takes place towards the end of the joint research project, and is relatively simple to carry out.

Despite all these insights into the dynamics of research collaboration, I would argue that two important gaps remain. The first is the lack of attention paid to *the analysis phase* of the research process. For instance, the process model by Teagarden et al. (1995) does not provide much guidance on the analysis phase. Interpretation is basically seen to follow ‘reliable and valid data gathering’, although the authors note that the process moves back and forth between the different stages of research as learning occurs. Furthermore, the diversity of team composition (that is, level of knowledge, skills, characteristics, and resources) is seen to affect ‘accurate interpretation’, but the authors do not discuss how this interpretation is jointly carried out.

The second gap is that methodological texts on research teams largely assume that collaboration concerns a *quantitative project*. Teams have been advocated for qualitative studies (Miles and Huberman, 1994), but little has been said about how they operate in practice. Furthermore, there is rare guidance on collective studies in the methodological literature on case studies. Discussions on e.g. multiple cases may indirectly relate to several researchers, but scholars are surprisingly silent about the actual collaboration. Yin (1994) addresses collective case studies when discussing in-case and between-case analyses, and some researchers discuss team work in international research projects (Easterby-Smith and Malina 1999; Salmi 2010; Segalla 1998), without really going into the cooperation itself. Indeed, it is only recently that the issue of team work in qualitative case work, and in particular the need for a shared platform for the collaboration, has been raised (Salmi, forthcoming).

Otherwise, methodological texts (implicitly) assume that a single analyst is conducting the case study. For instance, Halinen & Törnroos (1995) who address case studies in the context of network studies, refer to comparisons between cases (networks), but do not explicate the role of a team in these investigations. The assumption of a sole researcher perhaps stems from the stress placed on deep understanding and interpretation found in the literature on qualitative case studies. A case study is viewed as a ‘personal contract [that] is drawn between researcher and phenomenon’ (Stake 2005, p. 449). The input of other researchers is acknowledged in passing, and/or as a tool to get some comments on the work. For example, Stake (2005) refers to ‘teaming’ in the context of data gathering for a large case study. Dubois and Gadde (2002, p. 558) note that the evolving case should be made ‘a platform for discussions’ with other researchers and Stake (2005, p. 453) suggests that the project champion’s case synthesis should be commented upon by team members, data sources and ‘selected sceptical friends’.

This paper addresses these gaps and bridges insights from the methodological literature on collaborative research and qualitative case studies. The next section focuses on the abductive approach and aims to show how it can be affected by having a team working on case studies.

## THE CHALLENGES OF FLEXIBLE CASES IN TEAM WORK

Case researchers have increasingly started to question the positivistic assumption of a linear research process (e.g., Dubois and Gibbert 2010; Piekkari, Plakoyiannaki and Welch 2010). The abductive approach can be seen as an alternative view on case analysis that stresses emergence and flexible processes as strengths of good case studies (Dubois and Araujo 2007; Dubois and Gadde 2002). The approach has attracted recent interest, but has historic roots: Charles Peirce (cited in Van Maanen et al. 2007) argued in 1903 that discovery rests primarily on abductive reasoning; thus he sees research processes to involve induction, deduction, as well as abduction, where the latter plays a role in the moments of surprises and discoveries. Today, abduction is a concept that is widely used, but often in different meanings. In this paper, I use abduction as expressing the continuous interplay between concepts, data and methods. As I see it, researchers should pay more attention on this interplay, and to the ‘matching’ of the frameworks, data and analysis (Dubois and Gadde, 2002) throughout the research processes. For the purposes of the paper, abduction is thus a

“a continuous process, taking place in all phases of the research process. Analysis proceeds by the continuous interplay between concepts and data. Surprises can occur at the beginning, middle, or end of a research process” (van Maanen et al. 2007, p. 1149). While the abductive approach has wide ranging implications for case research generally, authors have not yet addressed the role of teamwork. I discuss next some of the key elements in abductive case studies; the research processes, case selection and analysis, as well as their implications for team work.

The abductive approach gives room for redirections in the research process. Abduction stresses going back-and-forth between theoretical framework, data sources, and analysis (Dubois and Gadde 2002). These notions stress emergence in case studies – it is important to let the empirical reality interact with the conceptual ideas in the analysis, to be open to new issues and to let the case process develop accordingly. Flexibility, however, does not mean a random process. Dubois and Gadde (2002) argue that there is a need for a framework from the start, but this framework should be allowed to further evolve. The evolving framework and the evolving case thus become the cornerstones of a case study.

These aspects of emergence and flexibility pose a challenge to any researcher, but particularly to a research team; on the one hand, a case study should be allowed to evolve in a way that cannot be controlled or prescribed, on the other hand, some control and coordination of teamwork is needed to ensure feasible cooperation. Furthermore, the team should agree on the general research design (e.g. what a case study means, given the different criteria for good case studies; Piekkari, Plakoyiannaki and Welch 2010), and on the approach to project dynamics (concerning e.g. redirections and evolving frameworks).

It may indeed be challenging for a team to cope with the evolving case: it does not suffice merely to bring the (end) results to the common table, but in the process the team should be ready for intensive discussions, remain sensitive to the emerging issues and readily adopt changes in the process. The suggestion of Dubois and Gadde (2002), to go for a ‘tight and evolving’ framework for case study, therefore seems to suit teamwork well. If the research is initially guided by a tight framework (that is, well specified issues of shared interest), there is a better chance of not merely (potentially randomly) collecting (descriptive) data about the research sites, but of analyzing them with a focus. Simultaneously, the evolving case study ensures that the emerging (empirical) observations and (analytical) findings that researchers in different sites achieve are also accounted for. Indeed, if these outcomes of fieldwork are brought under the analysis of the group – to the common platform (Salmi, forthcoming) – the wide knowledge base and diversity of the team may be most fruitfully used.

Case selection is a complex and critical issue in any study. According to Dubois and Araujo (2007), it is the most important methodological decision to be made, and still, ‘the relevance of a case is not necessarily known prior to the study’ (Dubois and Araujo 2007, p. 179). Given the redirections in the case process, ‘the task of the analyst is to progressively construct the context and boundaries of the phenomena under investigation, as theory interacts with methodological decisions and empirical observations’ (Dubois and Araujo 2007, p. 171). Therefore, the process of ‘casing’, that is, questioning what the case is a case about (Ragin 1992), takes place right until the very end of the study.

Having a team working on the case may affect case selection and ‘casing’ in several ways. Dubois and Araujo (2004, p. 210) note that: ‘The boundary around what constitutes a case evolves in response to both practical contingencies affecting the research process and the dialogue between theory and empirical evidence’. A team is bound to affect both the practical contingencies and the dialogue. A particular risk is that team members select cases based on the convenience of their respective features and ease of access, rather than considering other more theoretical criteria, which derive from the emergent understanding of the case. Despite the criticality of case selection, case researchers ‘often overlook the justification of why a case was selected and why it deserves the attention of the reader’ (Dubois and Araujo 2007, p. 179). For a team it is critical to define the case selection(s), because in this way it also explicates the reasons for the collaborative effort.

Most of the potential for team innovation lies in the collective matching process, provided the different backgrounds and knowledge bases of the team members are allowed to interact. To provide a deep understanding of complex qualitative data, it is important to bring in all members of the team (even contract researchers; see Easterby-Smith and Malina, 1999). Furthermore, in order to use the potential of teams to the full, there must be enough ‘scope to compare, challenge and synthesize ‘insider’ and ‘outsider’ perspectives’ (Marschan-Piekkari and Welch 2004, p. 13). One needs a reflexive dialogue, that is, creating ‘space in which to exchange expectations, assumptions, and feelings’ (Easterby-Smith and Malina 1999, p. 85).

Time is required for both reflection and reconsideration of one’s opinion, and to change mindsets (Lunnan and Barth 2003). Heterogeneous teams often struggle with the challenges of coordination and communication. One should, however, remember that it is indeed the various perspectives, iterations and rethinking that make collaborative study valuable and its results unique. Another challenge is that some members may become frustrated by the long processes involved. The first IMP study, involving researchers from five countries, in fact refers to this when discussing the face-to-face meetings within the group: One of their functions was “to maintain enthusiasm, cement the social relationships ... and to reach decisions on the next stage of the work” (Håkansson, 1982, p. 50). Moreover, the IMP Group notes that a key methodological issue was a balance between progress and rigor, since observable signs of both the progress and penetration were needed.

## EXPERIENCES OF COLLECTIVE CASE STUDIES

So far scholars seem to have been silent on the issue of team work in case studies, and in particular, in their analysis, and it is difficult to find published reports on this topic. Therefore, in this section I draw on my own experiences of participating in case collaborations. Based on these experiences, I distinguish three types of collective case studies: *joint*, *shared* and *independent*. In the joint and shared cases, the team focuses on the same case(s), with different degrees of involvement, while in the last one, the team adopts a case approach, but the team members conduct their own studies relatively

independently. My examples consist of one shared case, two joint cases, and one independent multiple case study. All examples come from the network tradition of business markets, in which research is often carried out in teams. The discussion in this section is based on my *ex post* reflection on what types of processes were present, and to what extent the abductive logic was adopted.

Next, I provide a brief overview of each individual project, from their design to the analysis and final output. The section ends with a discussion of the dynamics involved in these four illustrative case studies.

#### *Example no 1: Networks in transition (independent cases)*

This example of a multiple case study concerns a 5-year Nordic project focusing on Eastern European transition and foreign market entry (reported in Törnroos and Nieminen 1999). The initial research group was formed in 1993 and the results of the cooperation were published in a book in 1999. The key rationale for collaboration was the joint interest by several scholars in Denmark, Finland and Sweden in analyzing the ongoing transition process and Eastern European countries as potential target markets for Nordic companies. The leading authors, two Finnish researchers, initiated the project and gradually involved others, so that the book (and the project) has 11 contributors in total. The key output thus is a book with nine cases for analysts and managers. This project group was relatively large and heterogeneous as it involved researchers in different career stages (professors, postdoctoral researchers and doctoral students) from three countries.

In the initiation phase, the group met in different constellations and discussions revolved around the issue of how to apply the (industrial) network approach to the analysis of transition and foreign market entry. Later, the issue of learning was emphasized, showing that some abduction – redirecting the theoretical focus from networks – took place. We decided that each case study would investigate two key issues: business relationships and learning. The researchers were given a free hand in case selection – some used material they had already collected, while others conducted new case studies for this project.

The project initiators invited scholars whom they knew to have similar research interests and/or who had already worked with some companies (cases) to analyze the transition. In the early stages of cooperation, there was some integration of the group and joint reflection about the focus of the study. The idea was to conduct case studies for comparison, and for about a year the discussions centred on developing interview questions for the project. However, while some scholars worked intensively on the issues listed, not all members were keen on forcing their research into this formula, and the original idea of a common interview guide for all data collection was abandoned. The group had grown and became heterogeneous and the members had very different case data ready at hand. The draft interview guide still provided the basis for analysis in some, but not in all of the cases.

The nature of our cooperation changed over time: the beginning phase involved a smaller, inner group and was characterized by enthusiasm and intensive discussions. This was

followed by less frequent meetings, the gradual loosening of the original team and the introduction of some new members. Some of the individual case reports were developed during the process and show the influence of the (initial) teamwork, while those added in a later phase remained somewhat as outliers of the original idea.

This project involved researchers who were all alert to the transition process and thanks to their diversity, our discussions were intensive and provided new insights into the transition developments. While the individual cases (and the theoretical chapter drafts) were presented to the group and briefly commented upon, the analysis was not carried out jointly. No background information (e.g., interview transcripts) was shared, as we discussed only the key outcomes that individual researcher(s) had reached. We thus discussed our results solely at the general level of understanding 'learning in networks in transition'. Case combination and comparison were carried out by the project champions. Still, the comparison plays a minor role in the book and the key contribution is provided by the independent cases.

Our motivations to join the cooperation were different, but we all targeted the book as the key goal and outlet of the independent case studies. The aim was to provide a timely analysis of the (then new phenomenon of) transition process and of the experiences of different companies entering the market. The two project champions took an active role in the publication process, and were responsible for the summarizing analysis and case comparison, thus synthesizing the project.

*Example no 2: Managing project ending (a shared case)*

My second example concerns a micro-team: a dyad of two researchers. As a follow-up to an earlier project, we aimed to turn our academic understanding of network dynamics into managerial lessons. My colleague Virpi Havila (a Finn living in Sweden) had collected rich material for a case on the termination of production of commercial aircraft in Sweden. This was an 'ending' project successfully carried out by a Swedish company Saab Aircraft AB, and to us the case material illustrated a success story of how a company can handle a challenging situation by renegotiating contracts with its suppliers. My colleague offered this data to be shared in a joint project. We decided to use this data to discuss the network context of ending projects together with the consequent implications for project management, and to write a managerial book on project ending (Havila and Salmi 2009). The output of this collaboration thus offers one integrated case for managers. The time span for the joint project was three years, while my colleague worked with the case for ten years.

This case analysis had its background in our joint experiences of working in a team focusing on M&As (to be discussed in the next example). The decision to initiate the project was based on the availability of case material that could be used for a new purpose: to illustrate a managerial point that we felt had been neglected, i.e.; the challenges found in project ending. With the existing, rich empirical data we had several options as to where to focus and how to build our argument. Thus, the process of casing here meant narrowing down the conceptual lenses, focusing on certain aspects (that would be new and relevant for project managers in particular), while paying less attention on other aspects. Our joint

reflection, together with some additional reading and data gathering, was needed to produce the final case we have in the book. In summary, the original empirical case was shared within the team, and we jointly produced a new interpretation of it to illustrate a managerial point.

The process of analyzing the data and of writing the book was highly iterative. For two years we were in regular contact via telephone, email and face-to-face meetings. I familiarized myself with the case material (including the interview notes) and initial case narrative, and we both looked at a wide variety of secondary sources. My colleague had conducted 13 interviews in different countries, and later we briefly interviewed two of the company representatives. As some time had passed since the original case study, we did not go for any major round of new interviews, nor were all respondents any longer reachable.

It took time to familiarize myself with the case, and this project showed me how difficult it is to ‘embrace’ a case (Stake 2005) if one has not been involved in the data collection. On the other hand, my ‘outsider’ views opened new windows into the material and our discussions brought new perspectives to the rich data. For instance, it was as a result of the case analysis, combined with our previous understanding of network management concepts, that we uncovered the critical role of two managerial levels (the ending project manager and the top managers) to the ending of projects of this kind. Accordingly, the original interest in understanding what was happening in the immediate ‘ending’ relationships was thus directed to the key tasks of managers in different positions and also, to the broader networks. This example thus shows an emerging framework, because some of our initial research questions changed over time.

Taking turns during the writing process was necessary to absorb the data thoroughly and make the analytical iterations. The individual chapters took 3-5 iterations before the first version of the manuscript was ready. The key target and outcome of our cooperation is the book published in 2009, which is different from the initial case analysis in 2003 that my colleague had produced.

### *Example no 3: M&A and networks (a joint case)*

This case analysis (reported in Anderson, Havila and Salmi 2001; Salmi, Havila and Anderson 2001) is an offshoot of a larger research project, begun in 1995, examining networks in the Nordic graphics industry. Here we focused on the effects of an international acquisition on the network over a period of three years. Research cooperation in our team had started among peers – initially doctoral students, then academics in their early career – all investigating business networks. Having a common interest in the dynamics of networks (Halinen, Salmi and Havila 1999), we decided to add empirical cooperation to our joint conceptual work. The case approach was a natural choice, because we had all conducted prior case research and felt it was needed to understand the holism prevailing in networks.

In the course of discussing the general topic of dynamics at one research meeting, the idea of looking at M&As (mergers and acquisitions) as causing potential disruptions in network relationships emerged. One researcher raised the issue of M&As, while another was

familiar with a Swedish company that had been going through several M&As. Shortly afterwards, a Finnish company announced an acquisition that would also affect the Swedish company. Being alerted to the conceptual issue (M&As' effect on network dynamics), our Finnish-Swedish team seized the opportunity to follow real-time developments around M&As of a number of companies in the international (Nordic) context. Thus, we soon set out working on a joint case study of cross-border and domestic M&As, where the team members focused on the local companies, but we could jointly investigate the international connections of these companies and the international networks. The Swedish and Norwegian companies were interviewed by the Swedish researchers, while the Finnish companies were approached by the Finnish researcher(s). We adopted a longitudinal approach and interviewed in total 13 managers from seven companies during 1998-2001.

As the case analysis was conducted over time, we could follow the dynamics in real-time and reflect, as well as make iterations in our research design. In particular, when following the developments, we used a snowballing technique in approaching new, connected companies. The key informants were approached four times over the years, and thus we were able to deepen and question the initial findings from the interviews. With regard to analysis, the cooperation and discussions within the group were intensive: we brought to meetings several viewpoints and local understanding for the group to reflect upon. We shared the interview transcripts and notes; everyone could understand the English and Swedish material, while the contents of the Finnish material were given more time during discussions in order to transfer the meanings to the whole group.

Our research setting allowed us to look at relationship developments over time. We started with a focus on the immediate effects of the acquisition and on the managerially intended results of the deal, but the case developments led us to understand the spread of change in an international network more extensively and also to see the unanticipated effects. Accordingly, in the process of casing, we took a broader view of the network, by way of posing new research questions and involving more interviewees.

It was essential for our study that we obtained information from different contexts and network actors. We needed good access over time, but also the time and space in group meetings to develop our understanding of the case. Many factors contributed to the success of the case analysis: first, the team was relatively small (involving three, and two more with regard to the related projects); second, the members knew each other well and had a similar status, which led to open discussions about the case; and third, we had access to different sites and could address the respondents in their own languages. A further contributing factor was the active role of the Swedish team in initiating and in, to some extent, coordinating the project. We were also active in writing (e.g. conference papers) in different constellations, thus building up understanding of the case from different angles. The key outputs of the project were journal articles.

*Example no 4: Network dynamics and mobilization (a joint case)*

This case study (reported in Ritvala and Salmi, 2010) is one result of a recently started on-going project. It is conducted, again, in a micro team of two researchers. The focus is on the environmental state of the Baltic Sea and in particular, on the networking that takes place around the efforts to save the Sea. The success of these efforts seems to call for cooperation between diverse types of actors (administrators, NGOs, and companies), thus networking and mobilization of actors to join the efforts, are called for. The case study aims to analyze mobilization from dyadic and network perspectives; that is, to consider the mobilization efforts, but also how these efforts are seen and reacted on by the target actors (companies) of the networks. To date, the homogeneous research team has cooperated on this project for close to two years.

Research cooperation thus started between close colleagues (within the same discipline and same university). Having a common interest in the dynamics of networks and institutional change (Ritvala and Salmi, 2009), we decided to direct our attention to a new empirical context. Our empirical case is the emerging issue network around Baltic Sea, which is in an alarmingly poor condition. We selected this particular case because it represents a contemporary pressing issue the solving of which requires the mobilization of new types of networks across borders. This context provides us with a fruitful setting to study network mobilization around a common issue, and enables us to make new theoretical insights on mobilization mechanisms and the emerging network itself. Thus, the case was jointly selected based on theoretical sampling (Patton, 2002; Glaser and Strauss, 1967).

In this project all the analysis took place jointly. For the (first) case analysis, the team conducted twenty interviews with 26 people. Both researchers participated in the interviews (except for one interview); one of the researchers transcribed them all, and the transcripts were jointly reflected upon to produce the case study. This feature of deep involvement in the project by both researchers has contributed to a rich and on-going dialog between the data, concepts and researcher's perceptions when conducting the analysis. The downside is that this approach is very time consuming; even the practical side of setting up mutually convenient times for the interviews is complicated. The advantage is that all data has been immediately available to both researchers and it may be reflected upon jointly. Simultaneous to the empirical data collection different reports on the topic have been written, and also different conceptual lenses (e.g. network mobilization views, social network theories, stakeholder theory and institutional approach) to the data have been applied (to be reported separately). The interview data has been complemented with a wide set of secondary data, including for instance, 28 webcasts, that we used as a background material.

This on-going project follows the empirical developments in real-time and reflects on them. Accordingly, iterations in the research design can be made. A snowballing technique in approaching new, connected companies has been actively used, and this has in fact been very efficient – thanks to the common interest in the contemporary issue, suggestions for new interviewees have been readily offered, and also everyone approached has been available for the interview. Analysis too is on-going, with continuous (almost daily) contact and discussions within the team. In the process of casing, we have taken different views of

the network, by way of posing new research questions and involving more interviewees. So far, a key finding of the work concerns a new type of actors – environmental networkers – which helps in understanding better the role played by individuals in promoting the issue and advancing network mobilization.

Collaboration within this case analysis has been exceptionally tight. In addition to discussing the case, we have developed our interpretation and understanding of it by active writing. Writing of (e.g. conference) papers, has built up understanding of the case from different angles. The key outputs of the project are (to be) scientific articles and conference papers. There are plans to continue with this case of a clean Baltic Sea for some time in the future; thus the case is undergoing changes and developing continuously as we collect more data and take different (conceptual) perspectives to the case.

#### How were the dynamics tackled in the cases?

A central point in abductive case studies is to allow for emergence and redirections. Timing issues of the research becomes critical too; in particular, since case studies often are longitudinal. The illustrative projects all followed different dynamics with regard to the research processes.

For the shared and joint cases, several iterations and redirections took place, and the highly integrated teams felt comfortable with intensive interactions. The joint case studies have evolved according to the real-time developments around the empirical developments, while the shared case was analyzed (for this purpose) only afterwards, when most data had been collected and analyzed by one researcher for the initial case study. In all of these cases, raw data were discussed by the group and the reported results were affected by the iterations and by the teams devoting plenty of time to joint reflections. The frameworks in these cases were relatively loose and evolved over time.

The independent case example followed a more linear path and even a deductive logic, with an initial aim of achieving a relatively tight framework. Even in this example, new directions were taken in the process, especially with regard to the issues (concepts) that were to be analyzed in each of the cases. Thus, emergence was evident in all four studies. The teams were, however, doing more of the analysis jointly in the projects with shared and joint cases. The following Table 1. summarises the key matching processes in these examples.

Table 1. Matching processes in the four cases

Type of case	Key phases in linking the data and the concepts
Independent cases (transition)	<p>I concept                      II empirical cases                      III new concept                      IV more analytical work on the cases and new cases added                      V synthesis written by team leaders</p> <p>Initially tight framework, loosening and evolving in the process</p>
Joint case (M&As)	<p>I concept and empirical case developing simultaneously                      II empirical &amp; conceptual scope extended and interview targets added in the process                      III issues (network change/horizon) discussed conceptually and empirically in iterations                      IV joint reporting</p> <p>Loose framework, evolving in the process</p>
Shared case (project management)  micro-team	<p>I network concepts                      II suitable empirical case available                      III analysis of the case and existing literature for a new purpose                      IV iterative writing; joint final report</p> <p>Material and case available, joint decision to focus on certain points and let others 'be silent'</p>
Joint case (mobilization)  micro-team	<p>I concepts and empirical case developing simultaneously                      II Interview targets added in the process (snowballing) and the empirical scope extended                      III network dynamics discussed conceptually and empirically in iterations; different conceptual lenses used                      IV continuous joint writing</p> <p>Evolving frameworks, several conceptual lenses used over time</p>

As comes to the internal integration of the teams, the teams working with joint and shared cases were small and also well integrated – in fact, the projects reported here only account for some of the activities that these research groups were doing together. Also, their starting point was that of an existing cooperation. Interaction for the case study purposes was therefore frequent and unforced. In the multiple independent cases, instead, the team was formed solely for the purpose of this project. It was dispersed and some researchers joined in later, and thus, commitment to the project was relatively modest. Therefore, a major coordination (and reporting) load was put to the two leaders, and all communication was led by them. I would in fact expect this to be typical situation for several large teams working with independent cases.

One striking feature of these illustrative cases is that they all report a successful case study. Neither did any significant conflicts occur in these processes. It would be revealing to find and discuss also examples of ‘badly’ going collaborations; as these may even more clearly show the problems in e.g. matching. This is a clear limitation to this paper and analysis.

Furthermore, one may ask what may be the value of these personal experiences and specific cases for more general discussion on (qualitative) case study methodology. I have chosen the examples so that I (having been an insider) have good knowledge of the processes, but furthermore, so that they would illustrate different, contrasting situations in doing collaborative case work.

Indeed, I would expect the first type of independent cases to be very (if not most) common in research collaboration. A group of researchers come together and work with individual cases. The second example of a joint case study seems to be typical too; all researchers contributed with their ‘pieces of data’ to the big picture that was forming. In addition, it is also a positive example of how a team can ensure access to foreign sites (companies within their respective countries), but still work in a synergetic way at the level of the entire case, including actors and relationships that cross borders. Another valuable feature of this case study is that it is truly longitudinal, and the team was committed long enough for the project to follow the empirical developments over time.

The other two examples (number 3 and 4) are special, since they were conducted by micro-teams, in fact in dyads. A clear limitation is that the situation of a dyad is not truly a team – having three or more members brings along connections between the dyads, and e.g. makes some of the interaction indirect. The examples serve their purpose here, however, since they illustrate other, perhaps less common, issues. Case example on project management (3) shows that a collaborative case study can be conducted on existing data. This type of situation may in fact be typical when researchers invite others to work with the material they have available. However, publications even in these situations seldomly report about the true character and division of work. The joint analysis of shared data is not without problems; firstly, it is more difficult to embrace the case the further away one is from the original data sources, and secondly, the problem in working flexibly with existing data may be that there is no access anymore to the data sources. The less there are possibilities for iterations and the further away one is from the data, the more difficult abduction may become. The final case, on network mobilization, in turn contributes by showing a case of very close cooperation in a team. In particular, it shows how the matching between data, concepts and methods (researchers) may take place when it is at its most intensive and closest.

## **DISCUSSION: JOINT, SHARED AND INDEPENDENT CASES IN EMERGENCE**

By providing an ‘insider’s view’ of cooperative research projects and investigating the reality of case work in teams, I have aimed to show the challenges and the potential related to collaborative case studies. This section discusses two issues that seem to emerge as critically important for research teams to consider. First, it addresses the question of

working with different types of cases: joint, shared or independent cases. Second, it looks at the interplay between teamwork and analytical processes and emergence in case studies.

### What to share within the team?

When investigating joint matching processes, a key question is what becomes shared and jointly handled in the team. Different ways of sharing may be placed on a continuum from sharing as little as possible to share as much as possible. Furthermore, sharing may concern data and/or analysis (including conceptual frameworks). In the previous examples the teams were basically sharing, respectively: 1. the framework and key concepts to be used for different cases; 2. the existing data, together with analysis for a new purpose, or 3. the data, data collection, and analysis. The possibilities for abductive analysis at the team level were highest in the last case, where so many issues of research were brought to the common platform over the entire research period.

To explicate better the meaning of sharing, I have suggested the further division of collaborative cases to *shared* or *jointly* conducted. The former means that the group members may use the same material, and to some extent do the casing together, but do not necessarily conduct the case study together, jointly. The last example presented earlier was a perhaps extreme case of joint case, where in practice all research decisions were made simultaneously within the micro-team.

Case studies often result in rich data. When scholars present the strengths of heterogeneous research teams, they assume that the rich data is actually brought into the analysis and further work of the team. When this happens, there is the potential for in-depth discussions and different interpretations. The necessary condition, however, seems to be that the material is shared and the team becomes involved in framework development as well. Three of the earlier examples show intensive reflections on the data and analysis, while in the first example (with multiple cases) the team members did not, for instance, see each other's interview notes or transcripts. In order to embrace the cases, the sharing of extensive information would be essential. Moreover, for the team to do joint analysis there seems to be need for thick, rather than thin descriptions. Since the latter means e.g. generalized findings, factual statements, or coded data offering a snapshot picture, one may question what kind of fieldwork can provide the former (Cunliffe; 2010) – it seems that if the team aims for using abduction, it would need to go for fieldwork that ensures thick descriptions that are shared within the team.

A team may work with a single case or with multiple cases. Thus, the team may share either the *case* (potentially with embedded cases by different researchers at different sites) or the *collection of cases*, where the cases are conducted separately and only their combination or comparison is jointly worked on. Both approaches for conducting case analysis are feasible, but they bring out different results and provide different bases for using abduction. Joint analysis seems to be easier to do when conducting a single, shared or joint, case.

But the group benefits from joint abduction in a multiple case study too, if it reflects on the nature of the 'collection' – what can be achieved by a specific combination of cases. The risk in collections of independent cases organized around a common topic is that researchers are satisfied with adding descriptions rather than analyses: the team follows the naïve path of collecting a wide empirical database, without necessarily conducting collective analysis. By bringing the issues and the analysis to the team, the cases may be produced collectively.

The question of sharing the cases relates to the features of the group and its ways of working together. The diversity of the team – knowledge, resources, skills – is bound to influence the analysis. It is certainly difficult to conduct joint analysis in a large group, in other words, to reach 'embraceable' cases in large numbers. As my examples mainly concern small, well-integrated teams there is not much room for analyzing the different team constellations in case work. But for future studies, this would be one of the fruitful areas to develop further.

So far, this section has addressed the question of what is brought to the common platform. Another issue, which is relevant for flexible case approaches, is the question of how the team handles redirections and iterations in the process. This will be discussed next.

#### How to deal with the timing and redirections?

I have proposed that joint matching may be used more and in better ways in collaborative case works. This approach means, however, that the team needs to consider the common platform explicitly and what kinds of issues are brought there. This leads to the practical question: Is there enough scope and time for team-based analysis? Indeed, all the case studies reported here involved several years (from initial idea to the key output varies from ca. 2 to 5 years) of more or less intensive cooperation – thus time wise, a collaborative case study is not a quick fix. Furthermore, for longitudinal case studies it may be difficult to set precise timelines; which in turn may complicate long-term commitment of the team members.

As comes to the timing of cooperative work in the earlier examples, the projects followed different paths, respectively: 1. cooperation in the early phase to discuss/formulate the common framework, but less collaborative attention on the common (comparative) results, 2. analytic and reporting cooperation after the case data had been collected, and 3. deep cooperation in all phases of the project, from the initial aim setting to collecting and interpreting data, and writing up the case.

This illustrates that team members may join in the case work at different times and different stages of the process. Consequently, they share different areas of the case work. Researchers may also exit the case project (although it did not happen here). Even the exiting members may have some impact on the process and on how the case evolves. Altogether, the interest and commitment of individual team members may vary over the time of research project.

When working jointly on an emerging case, it seems particularly important to bring the empirical findings into the group discussions early on and not leave teamwork to the end of the case process. The initial stories (Ghauri 2004) collected from the field should be shared within the group, thus putting them immediately under the analysis of several observers. Furthermore, this is preferably done, when one still has the opportunity to go back to the data sources, if needed. Furthermore, these discussions should be carried out using the ‘empirical language’ of the field rather than imposing ‘theoretical language’ too early (Dubois and Gadde 2002).

Whether one is ready to go for a flexible case process or aims at a linear process depends on the team and type of case study in question. Given the twists and turns present in any case research processes, it seems to be difficult to make a clear-cut division between a flexible and a linear approach. Still, evolving case and iterations seem to be more naturally adopted when the team is working with single (joint) cases.

Case collections often rely on the positivistic and linear orientation of analysis. Indeed, especially for large research groups, it may be easier to follow a well-specified path with a given organization, given frames and research questions used to collect and analyze data on the site, and to bring the results to the group for a joint report. In this case most of the analysis (and potential abductive processes) rest with the single researchers. Alternatively, the collective work on independent, but related cases may be taken towards more intensive analytical cooperation – bringing some key issues to the group, and letting joint reflection redirect the individual processes. The team may thus explicitly consider the case combination as the focus of collaboration.

Even when working with independent cases, there is a need to reconsider the selection of and contributions of them at different points of the research process – reflecting on such questions as: Do the initial case selections match with what the *group* wants to study, even if the research question is changing? How about the selection of additional cases and the sequencing and ordering of cases? Should the cases be approached in a different way? Letting the team affect individual cases would bring along some flexibility to the casing processes.

## CONCLUSION

Given the large number of collaborative research relying on cases studies and the increasing interest in developing the case approach further, scholars have been surprisingly silent on the interplay of collaborative work and case study approach. By addressing this gap, the present paper aims at contributing to (qualitative) case methodologies. Network researchers, in particular, typically work with cases studies, often in collaboration with others (Halinen & Törnroos, 2005; Salmi 2010). The key contribution of this paper has been to bridge the topics of teams and flexible (abductive) case studies. In particular, the paper notes the need for more careful considerations about what is shared in research teams.

A team should not be satisfied with merely building the practical infrastructure for collaboration, but needs to go further in collective analysis. This would mean joint matching processes; in other words, working together on one or several cases, but consciously taking the analysis to the group, by sharing the empirical findings, discussing the changing framework and evolving case, and working together for research reporting. To explicate the different settings for collaboration (which may help teams in defining what to share and when) this paper suggests three types of case studies: joint, shared and independent ones. The common platform for analysis may be found at the case level (shared/ joint case) or at the level of a case collection; both are feasible choices for teamwork, but lead to different research processes. Moreover, flexibility in research processes may be adopted and encouraged in both situations, but is probably more common when the team works on a single case (possibly with embedded cases).

One reason for focusing on teams in this paper is a belief that using the community features of research teams for analysis will lead to better-informed and more innovative case studies. However, to this end, teams need to pay more explicit attention to their collaborative efforts and joint analysis, not only in the process but also when reporting their studies. Real-life case processes seem to be ‘messier’ than reported in the methodological literature. Indeed, in practice research teams often seem to follow the iterative processes and emergence of abductive case studies, although this is not seen in their research reports. The process of abduction is largely hidden from view (Van Maanen et al. 2007), but could be made more visible. Teams, as case analysts in general, often fail to report their analytical paths as comes to the aspects of processes and timing. It is common that scholars carefully document the data sources, interviews and timing of research, even group meetings, but do not discuss the actual analysis. However, reporting the analytical paths would be valuable to convince others of the relevance and theoretical contributions of the study (Dubois and Araujo 2007). This would also help in developing the (case) methods further. For research teams it would be meaningful to recount openly what was done jointly within the team, and what was left for individual analysts.

This paper has initiated discussion on team work and dynamics in case studies. To some extent it has explicated the processes and team challenges, based on (personal) experiences in teams working with case studies. A limitation to these examples has been their focus on small (even micro-teams) and on the Nordic research context. To take the methodological ideas further a natural next step would be to expand the empirical analysis to other teams. In particular, more examples of large teams working with cases would be needed. Another, practical implication of the paper is the urge for all teams to reflect more openly on the joint processes in their case studies.

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