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Rigour vs. Reality: Contextualizing Qualitative Research in the Low-Income Settings in Emerging Markets

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Management scholars increasingly conduct qualitative research in low-income settings in emerging markets. These large communities, which often operate in the informal economy and cut across national boundaries, face enormous challenges in meeting basic needs. Nevertheless, low-income settings have not received separate methodological attention and are often subsumed instead under the more general and homogenous category of emerging markets. We argue that application of Western methodological conventions to low-income settings may result in decontextualized and distorted knowledge that does not advance societal betterment. We characterize research that strictly follows methodological rules and steps, with limited contextualization for low-income settings as ‘rigour-by-convention’. In turn, we introduce the alternative concept of ‘rigour-within-context’, which reconciles the seemingly opposing goals of rigorous and contextualized research. In this approach, researchers contextualize their research, even if this means deviating from established conventions. Hence, rigour should be judged by its internal logic rather than by external rules or templates not designed to capture key insights from low-income settings. We conclude by recommending the means through which contextualized research on low-income settings can be conducted.

Introduction

With increasing interest in the challenges of climate change, global inequality and other grand sustainability issues faced by management research (Eisenhardt, Graebner and Sonenshein, 2016; George et al., 2016), a growing number of scholars operating in Western frameworks conduct qualitative management research in low-income settings in emerging economies (Prahalad, 2014). People living in these settings often operate outside formal institutional boundaries (Webb, Morris and Pillay, 2013). Besides struggling to meet basic needs, they are also vulnerable to abuse by employers or authorities and subject to informal rule systems upheld by power holders in their community (de Lima, 2020). Gaining accurate knowledge in such low-income settings is important due to their large size, significant challenges and potential for societal improvements (Bell, Kothiyal and Willmott, 2017), and the possibility of generating novel theoretical insights (Barnard, Cuervo-Cazurra and Manning, 2017; Buckley, Doh and Benischke, 2017). While undertaking research in these contexts may lead to major societal improvements (Hart, Sharma and Halme, 2016), getting it wrong can potentially result in major detrimental unanticipated outcomes (Banerjee and Jackson, 2017; Hall et al., 2012).

Research in low-income settings, however, poses significant challenges for qualitative management scholars. To begin with, their contextual richness cannot easily be conveyed with methodological conventions originating from Western contexts (Fadahunsi, 2000; Halme et al., 2016). Management research has deeply internalized the ideals of natural sciences – to be rigorous and legitimate, knowledge should be context-free and universal (Bell, Kothiyal and Willmott, 2017; Czarniawska, 2016; Flyvberg, 2001; McLaren and Durepos, 2021; Welch, 2022). Such universal theorizing often takes the form of generating novel theoretical insights (Barnard, Cuervo-Cazurra and Manning, 2017; Buckley, Doh and Benischke, 2017). While undertaking research in these contexts may lead to major societal improvements (Hart, Sharma and Halme, 2016), getting it wrong can potentially result in major detrimental unanticipated outcomes (Banerjee and Jackson, 2017; Hall et al., 2012).
of generalizable propositions or theoretical models. Another challenge stems from the inherent epistemological, ontological and axiological questions that arise when employing Western frameworks. By ‘Western’ frameworks we mean the quality criteria espoused by researchers with North American and Western European origins or affiliations and/or training in a Western university. In contrast to universal theorizing, post-colonial scholars emphasize the situatedness of knowledge and call for methods that ‘do not damageingly decontextualize and appropriate’ (Westwood, 2004, p. 74). This requires commitment to reflexivity and engagement with low-income communities that build on sensibility and co-voice (Weston and Imas, 2019, p. 16). Taking contextualization seriously allows theorizing that is both locally relevant and analytically generalizable to theoretical categories.

In this paper, we pose the following research questions. Why is it challenging to conduct rigorous contextualized qualitative research in low-income settings in emerging markets? How can these challenges be resolved? To answer these questions, we analyse the methodological challenges faced by those who conduct qualitative research in low-income settings and attempt to align it with Western conventions of rigour. The challenges of contextualization can occur in any stage of the research process and are likely to lead scholars to ignore or obscure the idiosyncrasies of low-income settings. This may imply missed opportunities for making theoretical contributions and societal improvements in these settings. We argue that methodological decisions in the field have a direct impact on the quality of knowledge produced (Welch, 2022).

Our main contributions are twofold. First, we offer the notion of rigour-in-context, which suggests that rigour should be judged on its own terms and merits rather than on external rules or templates imposed thereon (Langley, 2022). Rigour should thus emanate from ‘the internal logic’ of a research project (Locke, Feldman and Golden-Biddle, 2022, p. 15) and be produced through a combination of technical mastery, creative crafting, reflexivity and transparency (Le and Schmid, 2022). Our notion of rigour-in-context reconciles the goals of rigorous and contextualized research, which are often seen as opposing (Welch, 2022). Second, we substantiate the notion of rigour-in-context by applying it to the study of low-income settings in emerging markets. We introduce three types of contextualization that pose challenges to researchers studying such settings: (i) contextualization of research process and methods; (ii) contextualization of findings; and (iii) contextualization of the researcher. We offer solutions for overcoming these challenges and provide examples of how researchers have addressed them in practice. To achieve rigour-in-context, we argue that researchers should adapt data collection and analysis techniques to the realities of low-income settings (hereinafter ‘reality’ for brevity).

Since we advocate contextualization in this paper, it is important to discuss our positionality. We approach research in low-income settings primarily from the perspective of Western universities, although one of us was educated in a low-income emerging market. We have conducted qualitative research in low-income settings in Brazil, four East-African countries, India and Sri Lanka over several decades, and also coached local researchers on publishing in high-level journals. This study is motivated by these experiences, which have taught us first-hand how methodological conventions can fall short and thereby hinder authentic knowledge production on low-income emerging markets. A non-positivist stance unites our co-author team.

In what follows, we make the case for differentiating between low-income settings and the broader concept of emerging markets. We situate our work in previous research on contextualization and rigour in qualitative management research and explain why methodological conventions may be unsuitable for research conducted in low-income settings, and even hinder the pursuit of rigour. In conclusion, we offer solutions to resolve these challenges, with the intention of supporting production of insightful knowledge on low-income settings in emerging markets.

**Why low-income settings differ from emerging markets**

Wealthy inhabitants in emerging markets lead lives largely like those in developed countries. In contrast, those in low-income settings in emerging markets struggle due to a lack of opportunities and unmet basic needs. The concept of emerging markets has recently been criticized for glossing over the heterogeneity between and within these markets (Akbar, 2022). To highlight this heterogeneity, we focus on two aspects that distinguish the impoverished from the more affluent populations in emerging markets: low income and lived reality.

Low income can be defined as earnings of less than US$5/day (World Bank Year, 2020). Many low-income individuals are part of the estimated 61% of the world’s employed population who make their living in the informal economy (ILO, 2018). Informal sector income often fluctuates with the availability of work in, for example, agriculture and construction. The self-employed often sell food or readily imitated goods on the street (ILO, 2018; Webb, Morris and Pillay, 2013). Housing in low-income settings is also informal, as formal tenancy or ownership is usually out of reach. The informal nature of work and housing adds to the vulnerability of low-income communities. Employers can withhold salaries without formal sanctions, authorities can confiscate goods for sale, unlicensed moneylenders (‘loan sharks’) may charge high interest rates and resort to brutal...
The assumption that management research should be context-free and universal to be considered rigorous and legitimate is deep-seated (Bell, Kothiyal and Willmott, 2017; Czarniawska, 2016; Flyvberg, 2001; Welch, 2022). This poses a serious challenge for researchers studying low-income settings; the richness of context which should be the essence of qualitative research suddenly becomes a hindrance (Plakoyiannaki, Wei and Prashantham, 2019, p. 6). As we will argue below, the dominant Western methodological conventions define rigour in a very narrow sense, leading researchers to make compromises that overlook lived reality in low-income settings (Bell, Kothiyal and Willmott, 2017, p. 543).

The benefits and challenges of contextualization

Contextualization in qualitative research has long been recognized as a critical factor in management studies (Adler, 1983; Bell, Kothiyal and Willmott, 2017; Brannen, 2021; Shapiro, Glinow and Xiao, 2007; Tsui, 2004; Welch, 2022). The benefits of contextualization are manifold, including the development of stronger and more useful theories for practitioners, which in turn better reflect the complexity of the social world we study (McLaren and Durepos, 2021, p. 74). In post-colonial and decolonial literature, contextualization is approached from a more political perspective than in mainstream management research ‘as an agenda that invites dialogue, understanding, and immersion in localities which are traditionally at the margins of our society’ (Weston and Imas, 2019, p. 16).

Broadly speaking, contextualization refers to ‘linking observations to a set of relevant facts, events, or points of view that make research possible and theory that form part of a larger whole’ (Rousseau and Fried, 2001, p. 1). Depending on the researcher’s philosophical commitments, context is treated in different ways. For example, positivists typically treat context as a pre-existing fixed container in which to place the phenomenon of the study, whereas non-positivists embrace context as ‘a set of relevant connections that we construct as part of the research process to help achieve a research goal’ (McLaren and Durepos, 2021, p. 74). In embracing context, we may also unconsciously ‘bind our interpretation to the context constructed by the dominant social group’ (McLaren and Durepos, 2021, p. 78).

Despite recent calls for contextualization, it is often compromised due to cultural misinterpretation on the part of researchers (McLeod, Payne and Evert, 2016), the effect of intermediary bias on data collection (Christensen et al., 2017), over-reliance on verbal data (Shapiro, Glinow and Xiao, 2007) and translator bias (Rajan and Makani, 2016), for example. In low-income settings, contextualization is further undermined by local power holders, who tend to restrict communication between outsiders and communities under
their power (Hennchen and Schrepf-Stirling, 2021; Whiteman and Cooper, 2016). Researchers have criticized the ‘context deficit’ in management research and highlighted the detrimental effects of decontextualized research (Johns, 2017, p. 582; see also Cunliffe and Scaratti, 2017; Jackson et al., 2019; Kelemen and Bansal, 2002). The risks of disregarding contextual factors can be a major source of misrepresenting the complexity of the underlying phenomena, leading to ill-specified theory (e.g. Jackson et al., 2019; Rousseau and Fried, 2001). While the above risks may also appear in other settings, they are pronounced in low-income settings (Fadahunsi, 2000; Halme et al., 2016).

The contested nature of rigour

Rigour is a contested term in qualitative management research because of its many traditions (Bell, Kothiyal and Willmott, 2017; Harley and Cornelissen, 2020; Mees-Buss, Welch and Piekkari, 2020; Yanow, 2014). The dominant view equates it with transparency in the steps researchers follow during data analysis (Gioia, Corley and Hamilton, 2013; Grodal, Anteby and Holm, 2021). For those following the ethnographic tradition, ‘rigour stems from a deep commitment to reflexivity throughout a research project’ (Boswell, Corbett and Rhodes, 2019, p. 11), affecting the quality of reasoning and theoretical inferences (Harley and Cornelissen, 2020; Mees-Buss, Welch and Piekkari, 2020). For some scholars, rigour may be the form of ‘theories, methodologies, and data analyses that they themselves would use’ and with which they are familiar (Gulati, 2007, p. 777).

During the past few years, management researchers have started to move away from defining rigour in a procedural and mechanistic way (Czarniawska, 2016; Mees-Buss, Welch and Piekkari, 2020). Our concept of rigour-by-convention alludes to the risks of applying methodological conventions procedurally and unreflexively to settings where they do not fit. While this approach may provide legitimacy in the eyes of gatekeepers such as editors and reviewers, it may also lead to a sense of ‘false rigour’ (Eisenhardt, Graebner and Sonenshein, 2016, p. 1121). Such rigour is counterproductive, resulting in weak, decontextualized theory with limited explanatory power for the phenomenon being studied, and producing knowledge irrelevant to the achievement of social impact. Instead, a more craft-based (i.e. involving tacit skills and imagination), context-specific view of rigour is gaining traction (Bansal and Corley, 2011; Bell and Willmott, 2020; Mees-Buss, Welch and Piekkari, 2020; Reay et al., 2019; Reuber et al., 2022). This alternative view suggests that since intellectual craftsmanship is ‘[i]rreducible to a formula, or to a set of protocols’, rigour should not be equated with the rigid application of rules (Bell and Willmott, 2020, p. 1378; Welch and Piekkari, 2017). It instead emphasizes the importance of craftsmanship and heuristics in undertaking rigorous qualitative research that is seen as a ‘skilful, imaginative and embodied activity’ (Bell and Willmott, 2020, p. 1380; see also Klag and Langley, 2013; Mees-Buss, Welch and Piekkari, 2020).

We align our conceptualization of rigour with these views to take account of the differences in value judgements and lived reality between Western researchers and local informants in low-income settings.

Low-income settings and the challenges of contextualization

A key debate on the contextualization of qualitative methods deals with ‘how research methods developed in the Western core are adapted to take account of local cultural characteristics’ (Bell, Kothiyal and Willmott, 2017, p. 544) and the institutional features of emerging markets (Marschan-Piekkari and Welch, 2004; Plakoyiannaki, Wei and Prashantham, 2019). The data most likely to be missed in low-income settings span several ways of knowing, including communication and the sensory and cultural. Consequently, research about these settings runs the risk of missing the multidimensional contextual richness that has the potential to deepen contributions to new knowledge (Shapiro, Glinow and Xiao, 2007).

To respond to our first research question, we next discuss three types of contextualization that pose challenges to researchers studying low-income settings: (i) contextualization of the research process and methods (Michailova, 2004); (ii) contextualization of the research findings (Buckley et al., 2014; McLaren and Durepos, 2021; Welch et al., 2011); and (iii) contextualization of the researchers themselves (Alvesson, Lee Ashcraft and Thomas, 2008; Ly and Speijdnaes, 2021; Wilson, 2004). The first type of contextualization accounts for the changes, deviations and adaptations researchers make to their research design, data collection and analysis techniques to reflect reality in low-income settings. The second type refers to context as a resource − not a hindrance − to theorizing by incorporating it into explanations of the social world (Welch, 2022). In doing so, researchers refrain from presenting their findings in the form of universal and generalizable propositions or theoretical models, and even go beyond specifying the boundary conditions of their theories (McLaren and Durepos, 2021). The third type embraces the impact of the demographics, knowledge, skills, attitudes and experiences of researchers on data collection, analysis and findings. Together, the three types cover both the research process and new holistically produced knowledge about low-income settings.
We conducted a literature review on qualitative management research in low-income settings published in leading management journals (described in Appendix 1 in the online Supplementary Information). The results of this review, together with other pertinent literature, are distilled in Table 1, which summarizes how the dominant Western methodological conventions guide the pursuit of rigour in qualitative management research regardless of context. We juxtapose these conventions with the reality of fieldwork in low-income settings based on previous research and our own collective experiences of doing research in these settings. These are integrated under the three challenges of contextualization defined above (see Table 1). While these challenges could to some extent apply to qualitative research in general, we argue that their impact on fieldwork conducted in low-income settings in emerging markets is compounded.

**Challenge 1: Contextualization of the research process and methods**

Western methodological conventions tend to prioritize recorded, transcribed and coded interviews as the main data source and expect researchers to use direct quotations from interviews as the primary means to ground theory in data and show evidence (see Table 1). In published papers, non-interview data tend to play a merely complementary role, thus making textual analysis of transcripts a fundamental component of theory building (Gephart, 2004; Silverman, 2017). These conventions implicitly hold that the informants from low-income settings are also familiar and comfortable with research interviews as the data collection technique (Eckhardt, 2004).

Personal interviews with low-income informants may raise doubts about the purpose of data collection, especially if recorded. Informants may suspect they are being exploited for political purposes or feel intimidated (Sandman, Meguid and Levänen, 2020). Recording interviews, the ‘gold standard’, poses further challenges due to colliding norms between formally legitimate (i.e. according to regulations pertaining to the formal sector), but informally legitimate business activities (Matos and Hall, 2020; Webb et al., 2009). For example, at the time of writing, one of our colleagues studying the Turkish circular economy struggled to record interviews because companies using recycled textiles purchased them from informal sector intermediaries, who in turn sourced textile waste from Syrian refugees or other impoverished waste pickers; the informants did not want to go on record regarding any connections with the ‘waste mafia’ — a derogatory colloquialism for those who trade with waste pickers. Furthermore, in poor rural or slum settings, there is usually a lack of privacy for the free expression of opinion. A foreigner or a relatively wealthier-looking individual often attracts a crowd, making it difficult to provide a safe environment for recording personal accounts.

When conducting fieldwork in low-income settings, the relationship between low-income informants and outside researchers is typically not as direct as normally assumed in qualitative research (see Table 1). Foreign and sometimes local (often upper-class) researchers need instead to rely on intermediaries (Halme et al., 2016; Shepherd, Parida and Wincent, 2020). In a similar vein, cultural and relational differences tend to be common within a single country when differences in social status are great (Middleton and Cons, 2014). Given that local researchers often represent a higher social class than their low-income informants, the ‘liability of status’ needs to be combatted when choosing research collaborators and assistants (Borchgrevink, 2003). In addition to local intermediaries who connect outside researchers with low-income informants, there are often gatekeeper organizations and individuals who control researcher–informant interactions (de Lima, 2020). Once in contact, researchers often have to rely on interpreters who may not share the same vocabulary, dialect or mindset with informants from low-income communities (Borchgrevink, 2003). For example, in a study on sustainable innovation in a low-income, informal settlement (Halme et al., 2016), a Tanzanian research team member listened to Swahili recordings of an interview in which she had not participated. She found that the interpreters had sometimes omitted issues or altered meanings. The low-income informants had been open about issues such as sanitation, oppression or violence, which had apparently made the higher-educated local interpreter uncomfortable, causing him to euphemize or simply omit embarrassing topics. This suggests that interpreters may take liberties in ‘transferring’ meaning by exercising their own judgement about what is appropriate to ask and what is (not) appropriate to translate back to the researcher.

The relational and cultural issues pertaining to the inquiries of educated researchers in low-income settings are often challenging because the informants, who are poor and often illiterate, may not understand the concept of research (Eckhardt, 2004). Informants may also refuse to participate because they feel intimidated or afraid of discussing something that they believe is not acceptable to the researchers, despite being part of their ‘normal’ everyday lives. This can compromise data quality because the informants may agree to participate but lie or hide information for the reasons described above. Interacting with a researcher from a faraway country with a merely intellectual interest in their everyday lives often alienates informants. Living with a low and/or irregular income, the informants may also not appreciate the value of participating in research projects because it takes time away from making ends meet (Lindeman,
Table 1. Rigour vs. reality in conducting qualitative research in the low-income settings of emerging markets

<table>
<thead>
<tr>
<th>Western methodological conventions guide the pursuit of rigour in qualitative research</th>
<th>Lived reality in low-income emerging markets</th>
<th>Type of challenge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal interviews are assumed to be the main data source and quotes from recorded interviews are expected in publications.</td>
<td>Personal interviews are difficult to undertake as recording interviews may intimidate informants living under corrupt or authoritarian regimes, resulting in evasive or self-censored responses.</td>
<td>Challenge 1: Contextualization of the research process and methods</td>
</tr>
<tr>
<td>Smooth interaction between researchers and informants in a shared language (often English) is implicitly assumed.</td>
<td>In researcher–informant interactions numerous languages, dialects and/or unfamiliar terminology are used, hindering informants’ ability to understand the questions and resulting in ad-hoc translation and difficulties in adapting questions and confronting the risks of misunderstanding interview accounts.</td>
<td></td>
</tr>
<tr>
<td>Researchers and informants are expected to have direct relationships.</td>
<td>Researcher–informant relationships are often indirect, involving gatekeeper organizations, interpreters and other intermediaries (fixers, etc.) that are likely to impede the research process.</td>
<td></td>
</tr>
<tr>
<td>Informants are assumed to understand the nature and value of academic research.</td>
<td>Informants have other priorities (e.g. struggles of daily life); they may be transient, poorly educated or illiterate and misunderstand the concept of research, resulting in self-serving responses or responses intended to please researchers.</td>
<td></td>
</tr>
<tr>
<td>Long-term ethnography is considered the ‘gold standard’ that produces rigorous findings.</td>
<td>Low-income settings seldom allow outsiders to stay for lengthy periods due to inferior conditions, safety concerns and threats of violence towards wealthier-looking foreigners.</td>
<td>Challenge 2: Contextualization of the research findings</td>
</tr>
<tr>
<td>Data analysis and interpretation are assumed to be straightforward.</td>
<td>Researchers often face major challenges in interpreting data due to voids of meaning and differences in lived reality with informants.</td>
<td></td>
</tr>
<tr>
<td>Translation of interview data from the local language into the reporting language of the study is assumed to be straightforward.</td>
<td>Translation of interview data from the local language into academic English can result in loss of informants’ meaning.</td>
<td></td>
</tr>
<tr>
<td>Research is assumed to contribute to universal theories generalizable across contexts.</td>
<td>Research produces contextualized findings which have both local relevance and analytical – not statistical – generalizability to theoretical categories.</td>
<td>Challenge 3: Contextualization of the researcher</td>
</tr>
<tr>
<td>Researchers are assumed to be detached and objective.</td>
<td>Research within low-income settings is often emotionally challenging, rendering objectivity/detachment difficult and, depending on the researchers’ philosophical commitments, perhaps undesirable.</td>
<td></td>
</tr>
<tr>
<td>Differences in lived reality are expected to be irrelevant to researchers’ interpretation (e.g. researchers’ identity and positionality are not problematized).</td>
<td>Researchers’ ability to interpret data may be bound by their Western frameworks, thus legitimating rather than confronting the status quo of informants’ lived reality. Acknowledgement of differences between Western researchers and local informants in world views and value judgements is essential.</td>
<td></td>
</tr>
</tbody>
</table>
2014); alternatively, they may hope to benefit from participation in research financially or otherwise (Ado and Wanjiru, 2018; Fadahunsi, 2000). In the latter case informants, who do not have an understanding of research as the pursuit of academic knowledge, tend to provide self-serving views, or views they expect the researcher wants to hear, regardless of their truthfulness (de Lima, 2020).

A further challenge lies in the preference of leading management journals to favour increasingly large datasets as a threshold condition for rigorous research. This makes outsourcing of research interviews to non-authoring research assistants or local service providers tempting (Shepherd, Parida and Wincent, 2020). While such practices produce a larger number of interviews, the immersion of the researcher in the field will suffer, resulting in a loss of important contextual understanding for interpreting the complex phenomenon being studied in low-income settings (Hart, Sharma and Halme, 2016). However, the risk associated with these service providers is that they resort to ‘standard respondents’ (some commercial agencies keep a list of convenient informants) or provide data they believe the customers want.

**Challenge 2: Contextualization of the research findings**

It is common that papers using qualitative methods for studying low-income settings present the analysis as a standard and uncomplicated step-by-step process without reporting the challenges of interpretation (Chmielewski, Dembek and Beckett, 2020; Ciambotti and Pedrini, 2021). Yet, transferring intended meaning from informants to researchers has generally been recognized as an important methodological hurdle in cross-cultural studies (Rajan and Makani, 2016). This is accentuated in research on low-income settings due to voids of meaning between researchers, interpreters and informants, which can also be caused merely by differences in the expressions and concepts used by the low-income informants and the foreign or local (usually upper-class) researchers (Borchgrevink, 2003). For example, during an interview with a Brazilian subsistence farmer regarding scale economies, the informant stated ‘I don’t know’, but one of the researchers (who was local and spoke Portuguese fluently) could tell by his gestures that he really meant ‘I don’t care’, something that was not detected by the other (non-local) researcher. Such voids are thus sometimes difficult to identify, let alone overcome.

Reliance on interview data can only produce skewed findings. For example, when conducting focus group interviews with rural Ethiopians on their energy use habits, Halme, Lindeman and Linna (2012) found that the village elders spoke on behalf of all the others in the focus group. The researchers were politely prevented from interviewing anyone individually, effectively suppressing all other views. Nahi (2018) found that during fieldwork in India, male employees of a non-governmental organization (NGO) sought repeatedly to speak for the local self-help group of poor women, although the researchers were interested in the women’s accounts. The male NGO representatives also kept watching the researchers to ensure that they did not talk with the poor women without their presence. While these situations may occur in any society and at any income level, they are typically more acute in low-income communities due to ‘social pressure, dependency relationships within the community and poverty’ (de Lima, 2020). In such situations, it is important that researchers consider the power imbalances when analysing and interpreting their findings on an under-studied setting (Reuber et al., 2022).

Most studies exclude local members in the authoring team or do not report using research assistants (Kistruck et al., 2011; Meyer, 2020). Instead, in seeking to prove their context-free stance, they report that foreign co-authors who have not been involved in the fieldwork have conducted the first fundamental coding of the empirical data (Kistruck et al., 2011; Shepherd, Parida and Wincent, 2020) or critically challenge their coding (Whiteman and Cooper, 2016). While such practices are in line with dominant views of rigour in analysing and interpreting their findings on an under-studied setting (see Table 1). Consequently, findings that are multi-vocal and context-dependent but with the potential to advance global knowledge can be overlooked (Tsui, 2007).

**Challenge 3: Contextualization of the researcher**

Conducting research in low-income settings can be emotionally challenging (see Table 1). The researcher often stands out due to skin colour and/or gender as it may be uncommon for women to obtain a higher education, work independently or be unaccompanied by a male relative. This may lead to innocent gazes but also to direct threats to the safety of researchers, who feel unsafe but are also ashamed for feeling scared (Whiteman and Cooper, 2016).
A researcher may also hold many identities in the eyes of the informants and hence may face role conflicts (Reuber et al., 2022). These roles include that of researcher, foreigner and in some cases guest in one’s home. In India it was common that when an interview was conducted in the home of the informant, the researcher was offered a glass of water. Being the guest, it was polite to drink the water, but without knowing its origin, this also made the researcher uncomfortable as they could not afford to get sick during fieldwork. Yet the perceived impoliteness of declining the water could disrupt data collection. Further, in longitudinal data collection, researchers develop a relationship with informants which may lead to an urge to help, or a sense of guilt for not being able to help. Balancing these different roles can create distress for the researcher.

The ability of researchers to interpret data may be bound by what they believe aligns with their Western understanding of ‘reality’, and thus with frameworks they adopt. The challenge here is that without contextualization by the researchers themselves, the status quo of management knowledge is reinforced and retained.

Towards rigour-within-context in knowledge production on low-income settings

We argue that in order to overcome the above challenges, the practices and techniques of data collection and analysis should be modified according to the lived reality in low-income settings, which often means deviating from the methodological conventions that dominate qualitative management research.

Addressing our second research questions, in this section we offer solutions in the form of a new conceptualization of rigour and substantiate it with examples from the literature review and our own field research experiences. We propose replacing the predominant notion of rigour-by-convention with rigour-within-context, as depicted in Figure 1. When following the rigour-by-convention approach, methodological conventions are imposed on the research context. In contrast, in the rigour-within-context approach (Figure 1, right side), rigour is judged on its own terms and merits rather than on external rules or imposed templates (Langley, 2022). Hence, rigour emanates from ‘the internal logic’ of a research project (Locke, Feldman and Golden-Biddle, 2022, p. 15), giving primacy to in-depth understanding of the local context and the use of research methods that fit this context (Bell and Willmott, 2020; Mees-Buss, Welch and Pickkari, 2020). In order to achieve rigour-within-context, researchers need a combination of technical mastery, creative crafting, reflexivity and transparency (Le and Schmid, 2022) when modifying and adjusting data collection and analysis techniques to the reality of low-income settings. When following this approach, methodological conventions are negotiated in situ (i.e. explored and developed in interaction with local informants and research assistants during the research process). The means for achieving this are: (i) contextualization of the research process and methods; (ii) contextualization of the research findings; and (iii) contextualization of the researcher, as we will discuss next.

In order to substantiate the notion of rigour-within-context, we offer solutions with illustrative examples for the three challenges of contextualization discussed above (see Table 1). These examples were identified using our literature review as the point of departure. We analysed whether and how authors engaged in the three types of contextualization (research process and methods, findings and researcher). We looked for evidence of their immersion in the field, the adjustment and appropriateness of research methods to low-income settings, inclusion of locals in the research team and the extent to which their contributions took the form of contextually relevant and authentic theory vs. theory without context. We also searched for evidence of the authors’
sensitivity to context and expressions of self-reflexivity throughout their papers. Next, we turn to practical solutions for implementing the rigour-within-context approach in low-income settings.

Low-income settings: Achieving rigour within context

Means for contextualizing the research process and methods

Adapting the research process and methods to the requirements of low-income settings means that data sources other than interviews should also be considered. Ethnographic methods coupled with observational data complement the insights produced by interviews (Chatterjee, Cornelissen and Wincent, 2021) and may even outperform them in low-income settings (de Lima, 2020). Observational notes can be supported by visual data such as photos and video clips, and methods of analysis can be tailored accordingly (Bell, Kothiyal and Willmott, 2017; Halme et al., 2016). However, the standard for doing ethnographic research originates from anthropologists, who remain sceptical of anything shorter than one year of fieldwork (Pels and Salemink, 1994). As urban slums or rural low-income villages seldom lend themselves to long-term stays, modifications are needed (Matos and Hall, 2020; Whitman and Cooper, 2016). Ethnographic methods tailored for short-term stays (Fadahunsi, 2000; Janda, Shainesh and Hillebrand, 2021), such as rapid ethnography (i.e. visits to local communities lasting from a few days to a few weeks, or multiple shorter visits; Halme et al., 2016), provide a feasible compromise, assuming there is a careful pre-study. This option, however, relies on the willingness of editors and reviewers to deviate from the current ‘gold standard’ of long-term stays upheld in (organizational) ethnography. Nor are ethnographic methods a panacea; if researchers continue to interpret social behaviour in low-income settings from their own Western perspective, this approach will become problematic (Tavory and Timmermans, 2020).

Useful data collection techniques can also be borrowed from other disciplines. In design research, researchers provide informants with the means to document daily practices such as disposable cameras. If informants have mobile phones, researchers may ask them to record short observations or other data. These would then be reflected on when the informants meet the researcher in person, yielding information unlikely to be captured through interviews alone (Sandman, Meguid and Levänen, 2020). For some research topics, video data that depict the facial expressions, posture and gestures of informants – and thereby reveal their knowledge and emotions – could be useful, coupled with discursive reflection with the informants to obtain well-rounded data for analysis (Clarke, Cornelissen and Healey, 2019; Mondada, 2019). Creative combinations of data-gathering techniques can also be useful:

A sequential triangulation of unstructured participant observations, diaries, semi-structured photo-assisted interviews and focus group discussions was carried out to validate views on family values among youths in Limpopo. (Ly and Spejldnæs, 2021, p. 213; emphasis added)

As discussed earlier, the socio-economic divides are so sharp that even local academic researchers belonging to a higher social class may not have direct access to low-income communities in their own country (Middleton and Cons, 2014; Shepherd, Parida and Wincent, 2020). In such cases, field assistants, sometimes called fixers, are necessary. These can be local NGOs (Halme et al., 2016) or various types of other actors offering local contacts. From a methodological perspective, research assistants influence the choice of informants, and together with the interpreters, convey researchers’ understandings of their subjects and vice versa. Research assistants thus enable and occlude particular kinds of inquiries, explorations and results, thus being an inherent part of the knowledge production process (Middleton and Cons, 2014). Thus, transparency and reflexivity regarding the influence of these intermediaries becomes a critical part of the rigour-in-context approach.

For foreign researchers, collaboration with local universities can help in the design and conduct of the study due to their contextual knowledge. However, while involving local researchers can be an excellent solution, it is not a panacea for securing rigorous knowledge and may ‘recolonize’ research in some cases. Paradoxically, in our experience it can sometimes be easier for an informant from a low-income community to talk to an interested foreign researcher rather than to a member of the same culture or nationality. This is because a local researcher may behave in a patronizing or arrogant way towards low-income informants and their subculture. Similarly, research assistants and interpreters, coming from or having roots in the low-income setting under study, may be able to transcend both cultural barriers and elitist distance (Middleton and Cons, 2014).

Means for contextualizing the research findings

In the rigour-within-context approach, contextualization of research findings is key. Observational and visual data can be carriers of contextualized findings, as they often provide compelling insights into the local context. Appreciating and preserving local frameworks and expressions in the analysis and theorizing phase help maintain the authenticity of the findings and produce contextualized knowledge. This is exemplified in the study by Shepherd, Parida and Wincent (2020) on jugardus, entrepreneurs in low-income settings that come...
up with resource-scarce creative solutions called *jugaad* in Hindi. They retain the local Hindi terms to convey authenticity, but also to avoid potential loss of connotations through translation into English:

This study *contrasts the West's focus* on sustainable competitive advantage and its effect on firm growth with an understanding of the East's focus on solving problems… While *jugaad* solutions failed to generate firm growth (for the jugaadu) they still had a substantial impact on inclusive growth. That is, *firm growth and inclusive growth do not have to go hand-in-hand.* (Shepherd, Parida and Wincent, 2020, p. 121; emphasis added)

Contextualizing findings calls for careful scrutiny by researchers during multiple rounds of interpretation with interpreters and informants. Sharing preliminary results with local informants is a promising means for contextualization of findings as it reduces the risk of neglecting the meaning of social behaviour. It allows researchers access to the interpretations and meanings of individuals who know local customs and conventions, as done by Winterstorm Värlander, Sölvell and Klyver (2020):

...during our analysis and sense-making of what drove the differences we started to see between contexts, we learned more about the two contexts and informally *vetted our ideas with local citizens who understood the entrepreneurial subcultures in each context.* (Winterstorm Värlander, Sölvell and Klyver, 2020, p. 7; emphasis added)

Contextualization of research findings may, however, cause problems in the review process. In a study of frugal innovations for low-income settings, we explained how chairs made of reused materials could be valuable for local elderly women when cooking and doing daily chores. Some of them had back and hip problems, making squatting painful (probably undiagnosed arthritis). In the review process, we were taken aback when a reviewer criticized us for ‘not knowing that [low-income women, italics added] are used to squatting’... Thus, we argue that contextualization of findings is also important because it allows researchers to develop and contribute to theories with greater practical and societal relevance in low-income settings. Furthermore, these theories have stronger explanatory power. By being so deeply familiar with the local context, researchers are also more able to refine universal theories through analytical generalization.

Careful reporting of the limitations of the study is also an inherent part of the rigour-within-context approach because it adds value to findings from under-studied settings (Rajan and Makani, 2016). Yet, many authors are hesitant to describe the limitations of their work, as it may compromise the perceived quality of their study and its contribution, potentially resulting in rejection. Consequently, researchers opt for following the rigour-by-convention approach as a safe path. In line with Brutus, Aguinis and Wassmer (2013), we posit that the limitations of a meaningful research effort will point towards future research. This is perhaps even more true of a field under development, such as management research on low-income settings in emerging markets.

**Means for contextualizing researchers**

As researchers, we ‘are situated in a particular time and space, which acts as our context, despite claims of objectivism’ (McLaren and Durepos, 2021, p. 80). The political, social and institutional contexts intrinsic to a researcher’s culture and beliefs inevitably influence knowledge production (e.g. Calas and Smircich, 1999; Clegg and Hardy, 1996). Once we contextualize ourselves, we become aware of our own impact on the knowledge we produce. In our review of qualitative studies of low-income settings published in management journals (see Appendix 1), only a handful of authors reflected on their own position in relation to their informants. In the examples that we identified, the authors referred to the relevance of their own nationality or ethnicity for the phenomenon under study (Ranganathan, 2018b), or their ability to speak the local language of the informants (Shepherd, Parida and Wincent, 2020) (Table 2). While but this information was shared with the reader, the authors did not engage in self-reflexivity regarding, for example, differences in social status and the effects of these differences on the findings.

Here we draw on the concept of reflexivity to emphasize the inseparable relationship between the researcher and the study (Alvesson, Lee Ashcraft and Thomas, 2008; Sandberg, 2000). For non-positivist scholars, contextualization of the researcher means being alert to such a relationship (i.e. being able to see and address it). By accounting for their own positionality in the field, researchers start to reflect upon how differences in worldviews, ideological assumptions, value judgements and experiences between themselves and their informants affect the research process and the findings of the study (Gergen and Gergen, 2000; Ly and Spejldnæs, 2021). These differences tend to be magnified in low-income settings.

For instance, in a field study of the economic coping practices of low-income Russians, we asked a 60-year-old waste sector worker about his post-retirement plans. He snorted at the question, and responded that it makes no sense to plan because his retirement is still nearly two years away. From a Western perspective, we could have interpreted this as a sign of inability to plan and perhaps further inferred that this inability may be characteristic, keeping individuals in poverty. Instead, through reflexive discussions with our local assistants, we understood that many unexpected things – some of which are beyond the individual’s control – may explain whether a
Table 2. Examples of contextualization in qualitative research in low-income emerging markets

<table>
<thead>
<tr>
<th>Type of contextualization</th>
<th>Illustrative examples (emphases added)</th>
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<tbody>
<tr>
<td>Contextualization of research process and methods</td>
<td>‘Lead author’s deep knowledge of the Nigerian context… Also proved helpful in understanding the mother-tongue-influenced English used by some participants, and the ethnic expressions used in some instances during the interviews’ (Eze et al., 2021, p. 797)</td>
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<td>• Methods that combine verbal (e.g. story telling)</td>
<td>‘Short-term ethnography with field research teams had a foreign and a nationally local academic as well as member(s) living in the studied locality’ (Halme et al., 2016)</td>
</tr>
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<td>• Non-data verbal collection methods (e.g. observations, artifacts, videos) in a contextually appropriate way</td>
<td>‘3-phase process for transcribing the interviews for analysis: (1) after the audio was transcribed (still in Hindi), the Indian co-author reviewed the transcription for accuracy; (2) professionals then translated the Hindi transcript into English; and (3) the translation was reviewed by the Indian co-author for accuracy (from Hindi to English)’ (Shepherd, Parida and Winceent, 2020)</td>
</tr>
<tr>
<td>Contextualization of research findings</td>
<td>‘To improve consistency and transferability, we discussed emerging insights with colleagues and industry experts during multiple extensive visits and regular interaction with local parties over the course of the study (e.g. using Skype). Toward the end of the study, we asked CO’s founder to critically evaluate our findings (Flick, 2009). We integrated this feedback into our final conclusions’ (Busch and Barkema, 2021, p. 749)</td>
</tr>
<tr>
<td>• Mix of local and international or local elite team members</td>
<td>‘… our findings also point to the importance of stakeholder management (specifically, managing stakeholder expectations) in order to ensure that BoP initiatives do not just pay attention to the needs of powerful “Western” stakeholders (such as retailers, distributors, and wholesalers, for example), but also to the vulnerable or marginal stakeholders (i.e. the communities themselves)’ (Chmielewski, Dembek and Beckett, 2020, p. 226)</td>
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<tr>
<td>• Multi-voicing – using locals (non-academics) as vetting mechanisms of data interpretation</td>
<td>‘The author speaks the region’s local language (Hindi) and has a strong local network, which facilitated data collection. For example, as a native speaker, this author was able to visit the urban slums and hear locals’ stories’ (Shepherd et al., 2020, p. 355) In addition to my ability to communicate in Hindi, I also developed a working understanding of Kannada (the state language) that allowed me to speak with a diverse pool of local people’ (Ranganathan, 2018a, p. 644)</td>
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<tr>
<td>• Contributions to theory considering the context</td>
<td>‘Researchers stick out and attract attention in the slums… Inability to help in difficult living conditions of informants is emotionally stressful’ (Halme et al., 2016, p. 116)</td>
</tr>
<tr>
<td>Contextualization of the researcher</td>
<td>‘The author undertook some unpaid part-time work [in businesses of the studied informal cross-border trade enterprises] and it was commonly the case that the starting role evolved into something else during the course of the fieldwork as the respondents recognised the author’s usefulness for their businesses… The process of informality can be an especially difficult one to study with conventional methods. Participants in an informal enterprise often tend to operate in fluid and diverse networks, and often, though not always, the individual acts in a clandestine and/or illegal manner… the researcher’s access to the researched, as well as the trust which enables the researcher to be allowed to remain within the social network of the researched for study purposes, are key in the context of informal enterprise research’ (Fadahunsi, 2000, pp. 254–255; emphases added)</td>
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<tr>
<td>• The researcher in relation to the field (e.g. researcher-informant relationship)</td>
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poor Russian man stays healthy or alive after the age of 60. In terms of knowledge produced, the inference of inability to plan is very different from that of temporal horizons, thereby making limited sense to poor individuals living in an unpredictable society.

Reflexivity means questioning our own positional- ity, what we and others may take for granted, what we are (not) seeing, saying and doing (Cunliffe, 2022). In the aforementioned fieldwork in Russia, we lived for a day with a woman (47 years old) and her 10-year- old granddaughter Nastja. Nastja’s mother had disappeared seven years earlier at the age of 21 and was found dead on a roadside a year later. They explained how the deceased had been the sunlight of their little home, but were extremely vague about what had happened. From our contextual background it made sense to ask what the police had found out about the case, but we got no response from this otherwise open woman.
Further, we found the grandmother to be overprotective of Nastja. Apart from school, she would only allow Nastja to go and buy food from a small shop visible from their apartment window. No friends, no trip to a relative in Greece who had even said she would pay for Nastja’s expenses.

From our positionality we at first took it for granted that the police would have tried to find the missing daughter and later investigate her death. After discussions with a local civil society representative we understood that poor young women can become victims of human trafficking for prostitution, and that it was common for the local police force to turn a blind eye to these cases because of lucrative bribes from traffickers. Prostitution-based human trafficking becomes a stigma for the family, which – together with fear of the trafficking mafia – silences them. This made us question our assumption about the overprotectiveness of the grandmother. Perhaps she was simply being sensible as pre-teen girls without safety networks are also potential targets of traffickers and sometimes relatives living abroad who offer opportunities to girls are also part of trafficker networks. Overall, these examples show how multi-voicing practices – in which researchers negotiate the meaning of data with informants or locally knowledgeable individuals – can be highly generative (Alvesson, Lee Ashcraft and Thomas, 2008; Denzin, 1994; Gergen and Gergen, 2000); they uncovered yet another aspect aggravating the precariousness of the life of poor women and girls in low-income settings.

Beyond top leading journals, we found papers in which the authors provided vivid examples of how they gained access to low-income informal businesses by taking on unpaid part-time work in order to gather data (Fadahunsi, 2000). The quotation below illustrates what contextualization of the researcher could look like:

On situating the self: This was my lived reality while I grew up in a slum in Brazil, part of the poorest of the poor whose suffering mobilized social entrepreneurs to put into practice the humanitarian discourses of charity and technical assistance. I have also been a subject of legitimation in this field. (de Lima, 2020, p. 51; emphases added)

Our own experience tells us that authenticity may become an obstacle in the publication processes of top journals; we once engaged in contextualization of the researcher by describing how those members of our research team who looked non-native and non-local attracted attention in the field. Consequently, they were interviewed for a local newspaper (anonymized for the review process). This was taken as a sign that we were too visible to gather valid data and used against us in the review process.

Thus, the rigour-within-context approach invites qualitative management researchers to take seriously contextualization of the research process and methods, the findings and their own positionality in the field. The most powerful quotations from our literature review that illustrate the three types of contextualization in low-income settings are summarized in Table 2.

**Discussion and conclusion**

In response to growing concerns over global inequality and other grand sustainability challenges, management scholars have started to conduct qualitative research in the low-income settings of emerging markets. Gaining insightful and relevant knowledge about these settings is important for management scholarship due to its potential to provide novel and useful theoretical insights, but also ultimately to improve business practice in markets with the greatest need of societal transformation.

However, much of the potential to produce new knowledge about low-income settings may be compromised because the methodological conventions that demonstrate rigour originate from the West and are often ill-suited for studying low-income settings in emerging markets. Such ethnocentric research methodologies (Adler, 1983) largely determine what is (not) accepted and legitimate from a Western perspective. As the colonial and post-colonial literature suggests, these conventions render Western contexts ‘the universal norm’ (Wston and Imas, 2019; Westwood, 2004). In an attempt to combat the implicit post-colonialism of the methodological conventions and help qualitative management research produce stronger and more relevant theory about low-income settings, we make two contributions.

Our first contribution is to propose a new way of thinking about rigour in qualitative management research by introducing the concept of ‘rigour-within-context’. This concept suggests that the rigour of research should be judged on the basis of the internal logic of a research project rather than external rules or templates imposed by outsiders (Langley, 2022; Locke, Feldman and Golden-Biddle, 2022). We contrast this view with the concept of rigour-by-convention, which refers to the methodological conventions originating from the West that are used – by default – to guide research in low-income settings.

Although this reframing of rigour resonates with recent contributions advocating craftmanship (Bell and Willmott, 2020) and the use of heuristics (Mees-Buss, Welch and Piekkarí, 2020) in qualitative management research, our new concept emphasizes the possibility of reconciling rigorous with contextualized research. While such reconciliation has been suggested previously (Welch, 2022; Welch et al., 2011; see also Reuber et al., 2022), this need is particularly acute in research on low-income settings. The concept of rigour-within-context allows qualitative management researchers to produce temporally and spatially situated theories that are
better at explaining empirical phenomena and hence also advance global management knowledge through analytical generalizability (Tsui, 2004). We believe that this reframing sheds light on the underlying assumptions of rigour as a contested concept more broadly.

As the second contribution, we apply the concept of rigour-within-context to the study of low-income emerging market settings. While research in low-income settings has proliferated, the idiosyncrasies that these communities pose for qualitative management research have largely remained a mute point in methodological writings. This is perhaps because efforts have primarily been targeted at legitimizing management research in low-income settings in emerging markets and because the methodological issues pertaining to their study have been suppressed to avoid compromising legitimacy (Hart, Sharma and Halme, 2016; Nahi, 2016; Prahalad, 2014).

In applying the concept of rigour-within-context to the study of low-income settings in emerging markets, we discuss three types of contextualization that pose challenges to researchers studying such settings and offer practical solutions for overcoming these challenges. Our work also suggests useful implications for the future study of low-income settings in developed countries, such as ghettos in the United States or marginalized communities in the suburbs of Paris. Researchers attempting to study these communities may find themselves having to deal with numerous challenges such as different languages, dialects or unfamiliar terminology, gatekeepers and voids of meaning (Outila, Piekkari and Mihailova, 2019) and lifeworld differences with informants. In this regard, our notion of rigour-within-context helps transcend the traditional low-income vs. high-income binary that has been upheld in research on the Global South and the Global North for a considerable period of time.1

While our study was limited to qualitative methods, further research could explore the challenges of conducting quantitative research in low-income emerging markets. Given illiteracy and the digital divide, traditional survey instruments or their modern Internet equivalents are likely to be problematic in these markets. The increasingly large datasets on low-income settings being commissioned by researchers through third-party providers should also be scrutinized, as it is difficult to verify their validity. Future research could explore whether these large datasets add value beyond data saturation requirements or whether they are primarily used to imply rigour and are therefore prioritized by journals at the expense of small-N but contextualized studies. Another potential avenue for future research is to elaborate on the importance of culture in research undertaken in low-income settings.

Given the deep-rooted influence of post-colonialism on methodological conventions, the solutions to the challenges we describe in this paper are not a quick fix that can be applied by individual researchers alone. Surpassing established practices of knowledge production in and about low-income emerging market settings calls for collective efforts from reviewers, editors and research funders. Also, the incentive structures for publishing should be critically rethought and revised. We hope our paper initiates such a discussion and helps researchers to seize the opportunity and contribute towards contextualized research and more meaningful theories that better address the pressing societal needs of low-income settings.

References


1We thank one of our reviewers for making this valuable remark.


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