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Qualitative Content Analysis: Conceptualizations and Challenges in Research Practice—Introduction to the FQS Special Issue "Qualitative Content Analysis I"

Margrit Schreier, Christoph Stamann, Markus Janssen, Thomas Dahl & Amanda Whittal

Key words: qualitative content analysis; quantitative content analysis; grounded theory methodology; history of qualitative content analysis; mixed methods; text analysis; qualitative research methods

Abstract: In this contribution we introduce Part I of the special issue on qualitative content analysis (QCA). We start by describing the rationale on which this special issue is based and our considerations in dividing the topic into two separate parts. We then provide an overview of concerns in the current methodological discussion of QCA, identifying four core areas: 1. the conceptualization of QCA as a hybrid of quantitative and qualitative elements or as a genuinely qualitative method; 2. the relationship between the German and the international discourse on QCA; 3. the question of whether theoretical and / or epistemological foundations of QCA can be identified; and 4. the lack of transparency in documenting the application of QCA. Next, we outline the process of putting together this special issue and provide an overview of the structure and how the contributions relate to each other. In this current Part I, we focus on contributions in which authors deal with questions concerning the conceptualization of QCA, and on discussions of challenges that arise during the application of QCA and how these challenges were met. We conclude that there are multiple conceptualizations of QCA in the literature, and that this multiplicity is reflected in the variety of challenges and creative solutions described by the authors in this first part of the special issue.

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1. The Rationale Underlying this Special Issue

Qualitative content analysis (QCA) has a long history in the social sciences. BERELSON was the first to define the *quantitative* version of the method as "a research technique for the objective, systematic and quantitative description of the manifest content of communication" (1952, p.18). In the same year, however, this was met by criticism from the German expatriate Siegfried KRACAUER (1952) when he published his article "The Challenge of Qualitative Content Analysis," in which he pointed to the limitations of a purely quantitative content analysis. KRACAUER's main points of criticism were directed at quantitative content analysis being limited to the analysis of manifest content, and at the focus on coding frequencies. Instead, he argued for the importance of including latent structures of meaning into the analysis, and he pointed out that the single occurrence of a phenomenon in a given text can also be meaningful. On this basis, he proposed a distinctly *qualitative* content analysis, and his article can be considered the starting point of the history of the method. Since then, QCA has been turned into a highly popular method that is used widely across the social sciences (MAYRING, 2019). [1]

Since then, the discourse on QCA has been developed in multiple ways: "Unfortunately, the term 'qualitative content analysis' is very ambiguous" (GLÄSER & LAUDEL, 2013, §63), and several widely diverse versions of the method have been presented (HSIEH & SHANNON, 2005; SCHREIER, 2014a; STAMANN, JANSSEN & SCHREIER, 2016). To advance the discussion of QCA both among its proponents and within the broader context of qualitative research in general, in 2016 Markus JANSSEN, Christoph STAMANN and Stephanie MUSOW initiated the conference "Qualitative Inhaltsanalyse – and Beyond?" (JANSSEN, STAMANN, KRUG & NEGELE, 2017). Our aim in this issue is to continue the work that they began at the conference, attempting to capture at least some of the recent developments of the method both in the German national and the international discourse, and bringing together applied as well as methodological contributions. [2]

We have been working on and putting together a special issue along these lines for the better part of the past two and a half years. Originally, we had planned on publishing all contributions in one single issue, but with the variety of topics addressed and the sheer number of contributions, splitting the issue into two volumes seemed more appropriate. In the first part, which you are reading now, we have put together foundational contributions in which the focus is on conceptualizations of QCA, as well as contributions about challenges in applying the method and ways of overcoming those challenges. The second part will be published in January 2020. There you will find contributions in which the authors discuss QCA from the perspective of specific disciplines, and examine the relationship between QCA and other methods and approaches. [3]

Consequently, we have split our introduction into two parts as well. In this current first part we provide an overview of the history and status quo of QCA, and in the second part we will focus on the future of the method. The article can thus be

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read as an introduction in the traditional sense, whereas in our introduction to Part II of this special issue we will build on these passages, making it more of a discussion paper in which we will draw stock of previous developments and where we are headed. In the following, we first outline some general issues underlying the discourse within and around QCA (Section 2). We then give an overview of the process of putting together this special issue and of the contributions (Section 3). We conclude with a short summary and point toward the second part of this special issue in January 2020 (Section 4). In this, we will merely touch upon some trends that we identify, but will leave questions that have not yet been sufficiently addressed, as well as the broader discussion, for the second part of this special issue. [4]

2. Trends and Topics in Qualitative Content Analysis

Based on publications on QCA over the past two decades, we have identified the following core topics and areas: 1. development of QCA within the broader methodological landscape; 2. QCA in the German national and the English-speaking international discourse; 3. the question of the foundations of QCA; 4. researchers' application and documentation of QCA. [5]

2.1 Development of QCA within the methodological landscape

For the German speaking context, the study on unemployed teachers by Dieter ULICH, Karl HAUSSER, Philipp MAYRING, Petra STREHMEL, Maya KANDLER and Blanca DEGENHARD in 1985 has been called a "milestone of qualitative social research"[1] (HEISER, 2018, p.96), and MAYRINGs textbook on QCA has been a landmark in the methodological literature from its first edition in 1983 until today in its 12th edition (2015). His importance for the development of QCA can hardly be overestimated. Since then, other versions of QCA have been presented (GLÄSER & LAUDEL, 2010, 2013; KUCKARTZ, 2018a; MAYRING, 2000; SCHREIER, 2012, 2014a), and the developers of these various versions have in turn refined and modified their original suggestions. In the case of MAYRING, these modifications may be considered comparatively minor, but Sandra STEIGLEDER (2008) made some suggestions for how to modify one of the versions of QCA according to MAYRING. Udo KUCKARTZ, however, made substantive changes to his versions of the method between the second (2014a), the third (2016a) and the fourth edition (2018a) of his textbook. Based on these and other methodological suggestions, we identified two main directions in which QCA has been modified in recent years. Within the first line of development, QCA is considered a "hybrid instrument"[2] (BURZAN, 2016, p.30) and has even been renamed. Within the second line of development, methodologists have sought to strengthen the specifically qualitative elements of QCA. [6]

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1 Original in German: "Meilenstein der qualitativen Sozialforschung"; our translation.

2 Original in German: "hybrides Instrument"; our translation.

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2.1.1 QCA as a hybrid method

As a psychologist, i.e., working from within a discipline that has long been dominated by proponents of the quantitative mainstream (GROEBEN, 2006), MAYRING (1983, 2000) developed QCA as a method that allows researchers to apply qualitative procedures in his almost exclusively quantitative discipline. By doing so, he offered to build a bridge between qualitative and quantitative methodologies (LANGE, 2008), long before mixed methods became popular as "the third research paradigm" (JOHNSON & ONWUEGBUZIE, 2004, p.14), at a time which has sometimes been called a time of "paradigm wars" (GAGE, 1989, p.4). MAYRING himself emphasized "[...] that qualitative content analysis is neither a purely qualitative nor a purely quantitative method. For this reason, 'category driven qualitative oriented text analysis' would be the more appropriate term"[3] (2012, p.30; also 2015, p.8). In the foreword to the 12th edition of his book, he suggested renaming the method "qualitatively oriented content analysis"[4] (2015, p.17). Other authors have also emphasized the unique combination of qualitative and quantitative features in content analysis, as well as the hybrid characteristics of the method (BURZAN, 2016; FIELDING & SCHREIER, 2001; GROEBEN & RUSTEMEYER, 1994). [7]

Precisely because of these hybrid characteristics, the method has been sharply criticized by qualitative researchers. STRÜBING (2017, p.92), for example, explicitly excludes QCA from what he defines as qualitative research. There may well be a connection between this exclusionary view of QCA within the strongly sociology-driven German methodological discourse and the highly dynamic discussion within the qualitative paradigm, which can be labeled—as REICHERTZ (2019) did—"Struggle for Supremacy in Qualitative Social Research,"[5] or in less polemic terms: "dynamic internal differentiation of center and periphery"[6] (MEY, 2018, p.50) within the field of qualitative social research. Contributors to the debate started out by focusing on questions of what qualitative research is and if there is a need for additional standalone paradigms such as interpretative research (FLICK, 2016; HITZLER, 2016; MEY, 2016; REICHERTZ, 2017; STRÜBING, 2017), then shifted to the issue of quality criteria (EISEWICHT & GRENZ, 2018; REICHERTZ, 2019; STRÜBING, HIRSCHAUER, AYASS, KRÄHNKE & SCHEFFER, 2018). The only author in this ongoing discussion to explicitly integrate QCA into the field of qualitative research has been Günter MEY (2016). This controversy is relevant to QCA because it has an impact on the discussions among researchers using the method, e.g., on quality criteria. If, on the one hand, QCA is considered a hybrid method and is located outside of the qualitative paradigm, quality criteria such as objectivity and

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3   Original in German: "Damit sind sieben Grundmerkmale zusammengestellt, die schon zeigen, dass die Qualitative Inhaltsanalyse weder ein rein qualitatives noch ein rein quantitatives Verfahren darstellt. Deshalb wäre die Bezeichnung "kategoriengeleitete qualitativ orientierte Textanalyse" auch eine treffendere Bezeichnung."; our translation.

4   Original in German: "*qualitativ-orientierte*[n] Inhaltsanalyse"; our translation.

5   Title of the English abstract.

6   Original in German: "[…] dynamische Binnendifferenzierungen von Zentrum und Peripherie"; our translation.

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reliability taken from the quantitative paradigm may be applicable (MAYRING, 2000; SCHREIER, 2012). If, on the other hand, QCA is considered a genuinely qualitative method, quality criteria such as credibility or trustworthiness may be more appropriate to studies in which QCA is used (ELO et al., 2014; GRANEHEIM & LUNDMAN, 2004). [8]

2.1.2 Developing the qualitative elements of QCA

Whereas researchers as such MAYRING (2000, 2001) have emphasized the hybrid nature of QCA, others—notably KUCKARTZ (2018a, 2018b) —have focused on developing the specifically qualitative elements of QCA and thus countering the points of criticism raised by proponents of qualitative research. One such point of criticism that has often been raised concerns the limitation of QCA to a purely category-based analysis. ROSENTHAL (2015), for example, argues with reference to MAYRING's version of QCA that using this method amounts to dissecting and fragmenting the *Gestalt* of a text; instead of investigating an individual case holistically, the individual case is broken down to its pieces (by categories) and these are then compared with other parts of other cases. This, she concludes, is to fall behind KRACAUER's (1952) plea for a more *qualitative* QCA (ROSENTHAL, 2015). LUEGER (2010) adds to this criticism from a broader perspective when he argues that the amount of material analyzed in QCA, the considerations regarding sampling strategies, and the focus of researchers using QCA on reducing the material based on categories alone, all reflect more of a quantitative orientation and are not compatible with "serious interpretative research"[7] (p.16). [9]

KUCKARTZ (2014b) has suggested that one way of transcending a purely category-based procedure in QCA in the direction of including case comparisons might be to combine QCA with the empirically grounded construction of types (KLUGE, 2000)—a version of the method that he has termed *type-building text analysis.* Other suggestions are to focus more on cases in conducting the analysis and interpreting the findings, for example, by using what he calls cases-by-categories matrices and thematic summaries (KUCKARTZ, 2016b, 2019). [10]

SCHREIER (2016) has argued in favor of giving greater importance to the process of developing inductive, data-based categories and paying more attention to the relationship between the categories that make up a given coding frame (JANSSEN et al., 2017; SCHREIER, 2016). In this context, she discusses ways of making the "category" concept and variants of coding in grounded theory methodology (GTM) accessible to being used in QCA. The difficulty in this is that there are fundamental differences between the concept of category as it is employed in GTM, and the classical concept (DEY, 1993; MUCKEL, 2011; SEIDEL & KELLE, 1995) implicitly underlying QCA. Within the classical concept, defining characteristics are named, and categories must be mutually exclusive. In

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7 Original in German: "Schon dies [die Arbeit der qualitativen Inhaltsanalyse mit einer enormen Materialmenge] läuft den Kriterien seriöser interpretativer Forschung zuwider, zumal hier meist stichprobentheoretische Überlegungen zur Anwendung kommen (und damit Relevanzstrukturen des Gegenstandes vernachlässigt bleiben) und sich die Auswertung solcher Gesprächsmengen meist schon aus Gründen des Aufwandes auf den manifesten Inhalt bezieht"; our translation.

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GTM, however, categories are understood as analytical constructs with dimensions and properties with an abstracting function. While the relationship between the categories in QCA is formal, in GTM it is substantive (e.g., causality, consequence, etc.). On the one hand, adapting elements from the category concept used in GTM to QCA would contribute to developing a more qualitative version of the method. On the other hand, doing so would require reconsidering some of the quality criteria and procedures for further analysis that are often used in QCA. If categories in QCA were no longer conceptualized so as to be mutually exclusive, for instance, reliability of coding would no longer be a suitable quality criterion, and coding frequencies would no longer be meaningful (JANSSEN et al., 2017; SCHREIER, 2016). [11]

Overall, it seems that researchers criticizing QCA have largely focused on the general characteristics of MAYRING's hybrid version of the method (BURZAN, 2016; ROSENTHAL, 2015), whereas more recent modifications such as KUCKARTZ's type-building text analysis (2014b) are used in research, but rarely discussed in the literature with respect to their methodological implications concerning the place of the method within qualitative research. [12]

2.2 The German and the international discourse on QCA

The latter question of whether QCA is seen as a hybrid or a qualitative method is closely linked to a second issue: How QCA is conceptualized and discussed in the German compared to the international methods literature. While QCA is one of the most popular methods for qualitative data analysis in the social sciences in Germany (MAYRING, 2019) and is routinely included in relevant textbooks and anthologies (AKREMI, BAUR, KNOBLAUCH & TRAUE, 2018; BAUR & BLASIUS, 2019; FLICK, VON KARDORFF & STEINKE, 2012; FRIEBERTSHÄUSER, LANGER & PRENGEL, 2013; LAMNEK & KRELL, 2016; MEY & MRUCK, 2010), this has until recently not been the case in the international English-language literature, possibly because of the close association of content analysis with a quantitative, frequency-oriented approach to textual data (overview in KUCKARTZ, 2018b, 2019; for an exception see GRBICH, 2012). [13]

This has started to change on two accounts. In the first place, the change can be traced back to developments in the Scandinavian countries. In general, the situation of QCA in Scandinavia has been similar to that in English-speaking countries: There has been a focus in relevant textbooks on methods such as GTM and discourse analysis at the expense of QCA (JOHANNESSEN, CHRISTOFFERSEN & TUFTE, 2016; POSTHOLM, 2010), in combination with a pronounced skepticism of what ELSTER termed "the analytical turn" (2007, p.455) in the social sciences and an accompanying distrust of the distinction between explanation and exploration. Over the past years, however, there has been a surge of interest in QCA from Scandinavian authors, notably by researchers working in the health sciences in general and in nursing in particular, resulting in descriptions of the method in journal articles and in a lively methodological discussion (BENGTSSON, 2016; ELO & KYNGÄS, 2008; ELO et al., 2014; GRANEHEIM & LUNDMAN, 2004; GRANEHEIM, LINDGREN &

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LUNDMAN, 2017; an influential article from health researchers, though not from Scandinavia: HSIEH & SHANNON; 2005). Second, researchers from German-speaking countries who have been involved in conceptualizing and developing QCA have increasingly been publishing their work in English, thus making it visible to the international community (GLÄSER & LAUDEL, 2013; KOHLBACHER, 2006; KUCKARTZ, 2014b; MAYRING, 2014; SCHREIER, 2012, 2014b, i.pr.). This has led to QCA now being more often included in some English-language textbooks and anthologies (BORÉUS & BERGSTRÖM, 2017; FLICK, 2014, 2019), and at least given mention in others (MILES, HUBERMAN & SALDAÑA, 2019; SILVERMAN, 2017). [14]

While QCA has thus been made more visible within the international context over the years, there are persistent differences in the ways in which the method is conceptualized by German authors (regardless of the language of publication) and by international authors. Among international authors, there is much greater variability concerning conceptualizations of QCA. Whereas VAISMORADI, TURUNEN and BONDAS (2013) follow MAYRING in emphasizing the systematic and thus hybrid nature of the method, the majority of international authors consider QCA as something of an umbrella term under which a number of different variants have been subsumed, ranging from primarily descriptive analyses of manifest content followed by frequency counts, to more interpretive analyses of latent content (BENGTSSON, 2016; GRANEHEIM et al., 2017; HSIEH & SHANNON, 2005). The question of whether QCA is part of the qualitative research tradition seems to be much less controversial in the international discussion. Here, authors do not hesitate to consider the more interpretive variant of the method as genuinely qualitative (BENGTSSON, 2016; ELO & KYNGÄS, 2008; ELO et al., 2014; GRANEHEIM & LUNDMANN, 2004). [15]

If the method is conceptualized in more qualitative terms, this results in a number of differences in descriptions of QCA in the international compared to the German discourse. To begin with, international authors emphasize the broad purpose of QCA, including, for example, increased understanding of the material (ELO & KYNGÄS, 2008) or the identification of patterns (HSIEH & SHANNON, 2005). As to how meaning is assessed, authors from the German tradition stress the role of the coding frame, consisting of categories and subcategories that are created so as to be mutually exclusive (MAYRING, 2000; SCHREIER, 2012; KUCKARTZ, 2014b for a different position). GRANEHEIM and LUNDMAN (2004), by contrast, argue that categories may overlap (also GRANEHEIM et al., 2017). Moreover, some authors discuss categories in relation to codes and themes; ELO and KYNGÄS (2008), for example, suggest developing inductive categories based on open coding techniques (likewise BENGTSSON, 2016; VAISMORADI, JONES, TURUNEN & SNELGROVE, 2016). BENGTSSON (2016) as well as GRANEHEIM et al. (2017) propose to supplement the developing of categories and the subsequent coding of the material with the identification of themes. Here themes are conceptualized as a kind of red thread that is seen as underlying different categories and can be interpreted as the essence of the meaning of the material, bringing QCA closer to thematic analysis as it has been proposed by BRAUN and CLARKE (2006). A final difference between the German and the

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international methodological discussion is related to evaluation criteria. Whereas discussion among German authors is centered around the suitability of quantitative evaluation criteria, notably reliability (KUCKARTZ, 2014b; MAYRING, 2014; SCHREIER, 2012, 2014b), international authors focus more on the applicability of criteria taken from the qualitative research tradition, such as trustworthiness and credibility (ELO et al., 2014; GRANEHEIM et al., 2017). [16]

If QCA is conceptualized in this way, it further raises the question of its relationship to other methods for analyzing qualitative data, including both similarities and differences. What, for example, would be the difference between, on the one hand, a version of QCA where developing underlying themes is part of the analysis, and, on the other hand, methods such as thematic analysis (BRAUN & CLARKE, 2006) or thematic coding (SALDAÑA, 2015)? And would the limitations of the use of QCA identified by SCHNEIDER (2016)—who argued that QCA is not suitable when it comes to analyzing contexts of origin—still apply to such a modified version of the method? [17]

QCA has thus been made increasingly visible in the international methods literature over the past two decades. This includes both longer standing conceptualizations of the method by German authors who have started to publish in English, and new methodological developments, particularly by authors from the Scandinavian countries who are more likely to consider QCA to be a qualitative method. Even though links can be found between these two discourses on QCA, they remain largely unconnected, and the consequences resulting from these different conceptualizations of QCA still require further discussion. [18]

2.3 Methodological foundations of QCA

In introductory textbooks on qualitative methods or the field of qualitative social research, authors often elaborate their assumptions and propositions about (the nature of) the world, social reality and the state of the science on which research methods are based (LAMNEK & KRELL, 2016; PERNECKY, 2016; SILVERMAN, 2017; STRÜBING, 2018; WARING, 2012). Usually, such discussions are subsumed under the umbrella term "methodology"; i.e., a system or a "framework of justification"[8] (STRÜBING, 2018, p.30) of methods. According to STRÜBING (2018), such a framework consists of three types of theories: Epistemological theories, social theories and the philosophy of science. Methodologies in this sense are not a type or class of theory on their own (DÖRNER & SCHÄFFER, 2012), but rather a consistent arrangement of various theoretical arguments, which can be used to justify and legitimize a method within a scientific community. [19]

While critics of QCA state that it lacks a methodological foundation (JANSSEN et al., 2017; REICHERTZ, 2007; SCHNEIDER, 2016), or that it contradicts key methodological principles of qualitative research (BURZAN, 2016; LUEGER,

8   Original in German: "Begründungsrahmen"; our translation.

2010; ROSENTHAL, 2015; STRÜBING, 2017), proponents of the different variants of QCA suggest that specific methodological foundations do exist. One such foundation common to the different variants of QCA in terms of text analysis is hermeneutics (GRANEHEIM et al., 2017; KUCKARTZ, 2018; MAYRING, 2015), which can be placed under the umbrella of "ontological assumptions" (GRANEHEIM et al., 2017, p.29). According to GRANEHEIM et al. (2017), when considering QCA, "[...] its roots in different scientific paradigms contribute to challenges concerning ontology, epistemology, and methodology in research using qualitative content analysis" (ibid.). It is the responsibility of the researcher to decide whether to take a positivistic perspective or a hermeneutic one when it comes to ontology. For epistemological assumptions, GRANEHEIM et al. (ibid.) focus on "co-creation," between interviewer and interviewee during data collection, as well as between researcher and text during data interpretation. Both KUCKARTZ and MAYRING describe the relevance of hermeneutics not only for the understanding of texts, but also for data collection and quality standards. Their approach to this, however, is more from a methodical perspective than a methodological one. For example, KUCKARTZ (2014b, p.18) explicitly writes:

> "For the purposes of this book, we are less interested in the historical, theoretical, and philosophical aspects of hermeneutics and more interested in the guidelines hermeneutics offer for the analysis and interpretation of data collected in qualitative research projects." [20]

He proceeds in a similar fashion with references to GTM and classical content analysis. And MAYRING (2015) draws on different disciplines, including communication studies, hermeneutics, the interpretivist paradigm, literary studies, and the psychology of text processing for his version of QCA. Neither KUCKARTZ, nor MAYRING discuss or elaborate these aspects in methodological detail in their textbooks. KUCKARTZ (2014b, p.19) writes that researchers need to "[b]ear in mind the conditions under which the text you wish to analyze [...] was created." And MAYRING (2014) describes a content-analytical context model, but neither elaborates on matters of power and social justice.[9] If these considerations were applied to QCA as SCHNEIDER (2016) applied them, this would mean not only focusing on the content of a text, but also on what is *not* in the text. This might then turn attention toward the societal allocation of power and the resulting conditions of what can be said and become the content of a text (JANSSEN et al., 2017; SCHNEIDER, 2016). [21]

Neither author discusses in methodological detail what a "text" actually is or, a closely related aspect, which purposes and possibilities of inquiry are prevalent in the different QCA approaches. Proponents of QCA agree that a text can have multiple meanings and not a single true one (as in objective hermeneutics); they also agree that researchers play a crucial role in its interpretation. But the question arises as to what is the purpose of QCA: To bring about all possible

9 BETHMANN and NIERMANN (2015) discuss differing national epistemological patterns of qualitative research in Germany and the United States which, according to the authors, are rooted in two different interpretations of American Pragmatism. Whereas in Germany the key principle of sociological knowledge construction is the one of distance between the researcher and the researched subject and its experiences, in the United States it is the proximity between these.

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meanings? The most conventional meaning in a given social context? The most accurate one (KUCKARTZ, 2014)? Or the one true meaning as in objective hermeneutics? [22]

If these and similar aspects were discussed, the question would arise as to whether QCA is a method of text analysis or a more comprehensive methodology.[10] A first step toward answering this question might be to elaborate on those premises and consequences that are inherent in the hermeneutical approaches, those to which proponents of QCA refer. [23]

Although a systematic and detailed examination of the question of methodological justification is still lacking, it seems that QCA is not a method without a theoretical background (SCHNEIDER, 2016). Rather, a substantial amount of such theories and knowledge exists, but the relations between these, and the extent to which epistemological, social questions and questions pertaining to the philosophy of science (STRÜBING, 2018) can be adequately answered, remains to be discussed. [24]

2.4 The application and documentation of QCA

Beginning with the first edition of MAYRING's book on QCA (1983), the method has been widely used across various scientific disciplines within the German speaking countries, for example in psychology (MAYRING & GLÄSER-ZIKUDA, 2008; SOROKO & DOLCEWSKI, i.pr.), education research (GLÄSER-ZIKUDA, HAGENAUER & STEPHAN, i.pr.; MUSLIC, GISSKE & HARTUNG-BECK, i.pr.), and in the field of evaluation research (KUCKARTZ, DRESING, RÄDIKER & STEFER, 2008). It is thus apparent that QCA is a popular method, yet when it comes to the adoption and conduction of it in research studies, there is often an issue of lack of transparency. This seems to be true for a wide range of studies, from those conducted by experienced researchers, to examination theses written by BA and MA students[11]. When it comes to descriptions of the research process, it is normal to have limitations according to the expectations of the publisher or the journal, which often lead to very brief articles on methods and methodology. It seems with QCA, however, that there exists an assumption that the mere naming of the method creates sufficient clarity, and renders any further specification unnecessary. Perhaps this can be explained as an optimistic over-estimation of the method's well-known rigor, since the presence of a strict set of rules has been stressed by many authors as one key advantage of QCA (KUCKARTZ 2018a; MAYRING 2015). As soon as it is actually applied to a specific research interest and specific research questions, however, it becomes clear that researchers are faced with uncertainties in the methodical process, regardless of how explicit the rules may be. [25]

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10 In his article in this special issue KUCKARTZ (2019) stresses that in his opinion QCA is a method and not a methodology. Therefore, it is up to the researchers themselves to clarify the fit of the method to their methodological standpoint.

11 Since our aim here is not to name and blame authors for providing poor descriptions of their methods, but to highlight what strikes us editors as a problem with research practice, we intentionally decided not to cite any studies here.

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3. Overview of the Thematic Issue

In this section, we first describe the motivation underlying this special issue and the process of putting together the contributions. We then provide an overview of the contributions and how they relate to each other. [26]

3.1 Motivation

These core issues that we identified in the current literature on QCA were discussed at the above-mentioned conference "Qualitative Inhaltsanalyse – and Beyond?" held in Weingarten, Germany in October 2016 (JANSSEN et al., 2017). We came away from these discussions with some answers, but even more so with some related and some new questions that we wanted to pursue in this thematic issue. Based on the conference, our motivation for this issue underlying our subsequent call for papers was threefold. [27]

First, we wanted to take up some of the core methodological issues that we discuss above. This includes, for example, the conceptualization of QCA as a hybrid or as a qualitative method, the consequences of these respective conceptualizations, the question of whether QCA is based on a methodological and / or theoretical foundation, and how QCA can be related to other, especially qualitative research methods. Participants at the conference drew our attention to additional methodological questions, notably, how QCA is handled in different disciplinary contexts, and the future development of QCA in an age of big data and mixed methods, as well as potential challenges relating to the use of QCA as a result of these changes in the broader methodological landscape. Second, we wanted to address the above-mentioned gap between the German-speaking and international authors working with and writing about QCA, and initiate a dialogue between these different traditions and different ways of conceptualizing and applying the method. [28]

Our third and final motivation was to address the issue we raise above, relating to the often insufficient documentation of how QCA is applied and carried out. We found this topic of insufficient documentation in the many questions we have received—both at the conference and at various workshops we have been running over the years—concerning the application of QCA. Despite the many variations of the method (SCHREIER, 2014a), in the concrete application to specific research questions researchers face a number of individual challenges that may require them to further adapt the method. At the same time, we believe that these challenges and consecutive adaptations can be utilized to advance the development of QCA and open new methodological perspectives. Our third motivation underlying this current issue, therefore, was to further explore such challenges and adaptations arising from the application of the method to concrete research questions and problems, and the inherent future potential for researchers of all disciplines to effectively make use of QCA. [29]

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3.2 Process

On this basis, we invited two types of papers to be submitted for this thematic issue: regular contributions and shopfloor reports. Regular contributions relate to the first two motivations, i.e., addressing core methodological and procedural issues and bringing together German-speaking and international authors writing about the method. In order to address these issues, we included relevant questions—as they are listed above—in our call for papers. When inviting contributions about the relationship between QCA and other qualitative approaches and methods, we explicitly asked for contributions both "looking out" from QCA towards other methods and "looking in" from other methods and approaches towards QCA. [30]

In addition to asking for submissions through our call for papers, we invited selected authors, based on their expertise, to contribute a paper. In the German-speaking context, we are delighted that Philipp MAYRING and Udo KUCKARTZ, as key representatives of the method, agreed to do so (with Udo KUCKARTZ having contributed already to the conference preceding this special issue: KUCKARTZ, 2016). In the international context, many key representatives of QCA were unfortunately not available, but we are again delighted that Amir MARVASTI, as well as Bammidi DEVI PRASAD and Mojtaba VAISMORADI (together with Sherrill SNELGROVE) agreed to contribute to this special issue and provide us with their view of QCA from the "outside in." MARVASTI (2014, 2019) looks at QCA from the unconventional perspective of an interpretive researcher who is, however, skeptical of the traditional divide between qualitative and quantitative research. DEVI PRASAD examines QCA from a historical perspective and discusses its role within the methodological discourse. He argues that QCA has been given only a minor role in the Anglo-Saxon context, and presents reasons for this marginalization. These are connected to questions of methodological and epistemological uncertainty and ambiguity. VAISMORADI and SNELGROVE write from a tradition of comparing and interrelating QCA and thematic analysis (VAISMORADI et al., 2013, 2016). [31]

We address the third motivation of exploring challenges, adaptations, and the corresponding potential of QCA with the second type of contribution, reports from the shopfloor. These are shorter contributions of only 1.000-2.500 words (occasionally longer), where we asked authors to describe a challenge they encountered when applying QCA in the context of a specific study, how they met this challenge, and what potential areas for the future development of QCA they suggest, to the extent that any become visible in the research process. [32]

In response to our call for papers, we received 68 extended abstracts, 40 of these for regular contributions and 28 for shopfloor reports (excluding abstracts for the additional five invited contributions). All abstracts were peer-reviewed by two editors independently, and assessed according to a number of criteria, e.g., to what extent a pertinent methodological issue was addressed, to what extent the authors based their contribution on the relevant literature or made an original contribution to the field (for regular contributions), and to what extent a specific

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problem as well as the way of addressing that problem was specified (for shopfloor reports). Out of these, the authors of 21 abstracts for regular contributions and 18 abstracts for shopfloor reports were invited to submit full papers. Based on a first version of these full papers, we made suggestions for revision, and papers were accepted to the extent that these revisions were incorporated. Fifteen regular papers and 14 shopfloor reports were submitted and accepted for publication, plus the five invited papers mentioned above. We consider the sheer number of contributions submitted to and included in this special issue to be an indicator of the importance of QCA in the current landscape of qualitative social research, and of the relevance of discussing and addressing the issues raised here. [33]

3.3 Structure

We divided the contributions in the overall special issue (including parts I and II) into four sections: conceptualizations of QCA; discipline-specific approaches to QCA; relationships and interconnections between QCA and other methods and approaches; and challenges and developments in applying QCA. The first, second, and third sections consist primarily of regular contributions, although some shopfloor reports are also included here. The fourth section primarily contains reports from the shopfloor, and also includes a smaller number of regular contributions. [34]

In Part I, published in September 2019, we have decided to bring together contributions where the question of what QCA is (*conceptualizations*) is being addressed, and contributions in which authors focus on the practicalities of conducting research using QCA (*practical challenges*). This struck us as an interesting way of framing Part I of this special issue: A concept is by definition abstract rather than practical, yet at the same time concepts are not independent of practice, but are in fact directed at practice. This is especially the case where research methods are concerned: How research methods are conceptualized has an immediate bearing on the research practice to which these methods are applied. In this current Part I of the special issue on QCA, we are thus bracketing the method, approaching it from both directions simultaneously. In Part II, to be published in January 2020, we bring together contributions from the remaining sections, i.e., contributions where the focus is on discipline-specific approaches to QCA, and contributions in which authors discuss relationships and interconnections between QCA and other methods and approaches. Thus, the authors of the contributions in Part II are concerned with the relationship between QCA and the environment in which QCA is located, be it the context of a specific discipline or the fit between QCA and other methods or approaches. Contextualizing QCA in this way can serve to highlight similarities, draw attention to differences, and can—or so we hope—in the best case contribute to building bridges across various divides. To summarize, Part I of this special issue consists of contributions from *within* QCA and is intended to provide a reflection upon the method and its application, while Part II is conceptualized so as to provide an *outside* perspective, contextualizing QCA within disciplinary and methodological

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contexts. Both perspectives seem necessary in order to continue the discussion of the topics mentioned above. [35]

3.3.1 Conceptualizations of QCA

In their articles, MAYRING (2019) and KUCKARTZ (2019) each provide a state of the art overview of QCA or of one of its variants. MAYRING (2019) goes back to the foundations of the method as he and his work group developed it and uses them to distinguish QCA from other text analytical methods. Based on this, he addresses the reception of his variation of QCA and problematizes interpretations that he classifies as misunderstandings. Finally, he addresses newer variants of QCA. [36]

KUCKARTZ (2019) extends the focus in time and takes KRACAUERs (1952) much quoted contribution to the necessity of a QCA as a starting point. KUCKARTZ summarizes the development of QCA and derives three "fields of further development" (2019, Abstract): Firstly, a stronger focus of the analysis following the creation of categories and thus, a more qualitatively oriented analysis overall; secondly, the demand for a stronger case orientation as a supplement to the dominant category orientation; and thirdly, a stronger reference to the international methodological discussion. He sees the latter as necessary both because of the stronger reception of the English-language discourse on QCA and similar text analytical methods, and with a view to increase active participation of German-speaking authors in the English-language methodological discourse. With his contribution, KUCKARTZ finally addresses the question of a more *qualitative* QCA, not least when he discusses the question of quality criteria against the background of methodological considerations. [37]

Sebastian RUIN (2019) also takes the question of a more *qualitative* content analysis as the starting point for his considerations, and seeks an answer in understanding and managing categories. Since he identifies categories as the core of the QCA method, the only way to achieve a more qualitative QCA is to further develop categories. Starting from scientific-philosophical reflections on the concept of categories, he then unfolds the possibilities of taking up the perspectives of constructors and reconstructors (in the sense of first and second order constructions) in corresponding categories, and thus making them accessible for analysis. He labels his approach an interpretative methodology. [38]

Jochen GLÄSER and Grit LAUDEL (2019) discuss and demonstrate the role that their extractive QCA can play in the discovery of causal mechanisms. They argue that in the course of extractive QCA a structured information base for further analysis is generated that can be used to support the reconstruction of social situations and processes. The authors define both limitations and possibilities of their procedure, as well as the role qualitative research can play in causal analysis. In their detailed argumentations, the authors allow for methodological comparative perspectives. [39]

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In such a comparative perspective, Mojtaba VAISMORADI and Sherrill SNELGROVE (2019) discuss similarities and differences in the concept of "themes" as the final outcome of both QCA and thematic analysis. The authors regard theme development as a fundamental procedure in all qualitative research, and consider it an active process of description and interpretation. [40]

Amir MARVASTI (2019) analyzes the connections of QCA to other qualitative methods and mixed methods. He concludes that researchers using QCA first need to clarify where in the field of qualitative research they locate themselves. Secondly, compared to other qualitative methods, he diagnoses a greater need for analytic sensitivity; i.e., that researchers applying the method must specify which kind of material they analyze and how this content has come about. [41]

In a partly historical perspective, Bammidi DEVI PRASAD (2019) describes, among other things, the role of the context and the text in QCA. He identifies three types of QCA and asks why the method is marginalized, especially in the US and the UK. He identifies a primary reason for this to be what he refers to as regional intellectual traditions, which influence quality criteria, or, more generally, the epistemological and ontological perspectives within which research is assessed and evaluated. [42]

Overall, the authors in this section primarily focus on localizing QCA within the current methodological landscape. Whereas MAYRING (2019) emphasizes the systematic nature of the method and its suitability for analyzing large amounts of data, others see QCA more within the qualitative research tradition, and make suggestions for how to strengthen the qualitative elements of the method. This includes, for example, drawing more upon the researchers' analytic sensitivity and background knowledge (MARVASTI, 2019; RUIN, 2019), reflecting more upon the process of creating categories (KUCKARTZ, 2019; RUIN, 2019), relating categories to themes (VAISMORADI & SNELGROVE, 2019), and expanding the range of quality criteria used for the evaluation of QCA studies (DEVI PRASAD, 2019). It also becomes clear that authors' conceptualizations of qualitative research differ widely, depending on the discipline they represent. GLÄSER and LAUDEL (2019), for example, argue from a political science perspective that a specifically qualitative QCA can be used to contribute to causal analysis. This view of the qualitative research tradition differs from qualitative research as it is described, for instance, by RUIN (2019) or VAISMORADI and SNELGROVE (2019). [43]

The contributors to this section also differ in their opinions as to whether QCA constitutes a method with or without any theoretical and epistemological foundation: KUCKARTZ (2019) stresses that QCA is merely a method, whereas MARVASTI (2019) and DEVI PRASAD (2019) strongly suggest that the ontological and epistemological foundations of QCA as an approach need to be elaborated. RUIN (2019) establishes an interesting connection between the types of categories used in QCA and the ontological stance of researchers making use of the method. He argues that the concept of categories as they are currently used is based on a realist ontology. He elaborates on an abductive process of

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developing categories where context and situation are taken into account. This would in turn allow for a more interpretivist and constructivist foundation of QCA. [44]

Overall, it emerges that there is clearly no consensus regarding the various questions about the conceptualization of QCA raised in the literature and at the conference "Qualitative Inhaltsanalyse – and Beyond?." QCA is defined in a number of different ways by different authors. We will come back to this point at the end of this contribution. [45]

3.3.2 Challenges and developments in applying QCA

The second subsection consists of contributions with a focus on methodological challenges. These are primarily challenges encountered when applying QCA to a specific research question; other authors focus on challenges raised by teaching QCA or by the application of other methods or approaches where QCA can be used towards finding a solution (see in particular the contributions on using QCA in the context of reconstructing subjective theories). In the following overview, the contributions are largely arranged so as to follow the sequence of the research process, ranging from issues concerning research design to challenges concerning the presentation of results and quality control. [46]

In the first contribution, Christoph STAMANN and Markus JANSSEN (2019) examine the process of learning about QCA in the context of an interpretation group. Although establishing a joint QCA practice in a group is difficult at times, the authors conclude that these challenges are not substantially different from those encountered in other interpretation groups in which the focus is on the joint application of other methods for the analysis of qualitative data. [47]

The authors of the following contributions focus on challenges that arise in the context of specific purposes and research questions that underlie the use of QCA. Julia SCHNEPF and Norbert GROEBEN (2019) demonstrate the suitability of computer-aided QCA for conducting a qualitative meta-analysis (also NIEDERBERGER & DREIACK, i.pr., in Part II of this special issue, for an example of using QCA for conducting a systematic review). Carmen HACK (2019) discusses the difficulty of analyzing different types of data, namely expert interviews and network cards, with the intention of identifying cooperative constellations between actors in communal contexts. She arrives at a method for analysis in which she integrates elements of qualitative structural analysis into the process of QCA. In these contributions, the ways in which different research foci and different materials may require adaptations of QCA become visible. [48]

In their shopfloor reports, Annatina KULL, Suse PETERSEN and Marc-Antoine CAMP (2019), as well as Sybille REINKE DE BUITRAGO (2019), address the analysis of multilingual and multicultural material. In the case of KULL et al., the material consists of interviews with students of music from China and Switzerland, resulting in interviews conducted in Chinese, French, and Swiss German; REINKE DE BUITRAGO looks at documents and expert interviews on security policy in the US and in Germany. On the one hand, the authors address

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these challenges in different ways: KULL et al. transcribed all material in the language of the interview, translated it into German, created a coding frame in German, and analyzed all of their material in German. REINKE DE BUITRAGO, on the other hand, left all material in the original language and created codes and categories in both English and German, which did not necessarily mirror each other. Despite these differences in handling the material, the authors of both contributions describe how they included native speakers at all stages of the analysis and consider this an essential step in the analysis of multilingual texts. With increasing numbers of research projects conducted across borders, for example in the context of EU funding, the analysis of multicultural and multilingual material will certainly remain a challenge in the future, and best practices remain to be explored. [49]

In the following contribution, the focus is on questions that arise in the process of creating a coding frame. Dominic ŽELINSKÝ (2019) explores how QCA can be used towards generating new theoretical knowledge. He suggests supplementing the traditional deductive and inductive processes of creating categories with abductive strategies, thus facilitating the generation of new theoretical knowledge. [50]

The next challenge in the research process concerns the actual coding procedure. Karla SPENDRIN (2019) describes the problem that she repeatedly assigned one unit of coding to multiple categories, seemingly violating the requirement that categories be mutually exclusive. SPENDRIN goes on to show that there are different reasons why a unit of coding is assigned to more than one category. Some of these can be addressed by modifying the coding frame or the unit of coding, whereas others are rooted in conceptual issues. Judith BECKER, Franziska MOSER, Maria FLEßNER and Bettina HANNOVER (2019) likewise focus on the coding process, here in a cooperative research group, and compare two versions of the method: summative and inductive QCA. The authors argue that the use of interrater agreement is not restricted to determining reliability, but can be seen as part of an iterative coding procedure for gauging potentially divergent interpretations of categories among the researchers. Like SPENDRIN, BECKER et al. also mention coding units and assigning one unit of coding to more than one category. [51]

Cornelia DRIESEN (2019) addresses the question of how to continue once QCA has been completed: She suggests using sequenced ranking, a method adapted from linguistics, in order to assess the importance of categories in the material. This, she argues, allows the researcher to go beyond limiting the results of QCA either to a mere description of the coding frame, or to the reporting of coding frequencies. [52]

As we mention above, the quality of QCA has traditionally been evaluated based on assessing coding reliability, although over the past two decades criteria such as trustworthiness and credibility have also been brought to studies in which QCA is used. In her contribution, Margaret ROLLER (2019) takes these ideas one step further by applying a procedure called the "total quality framework" not just to the

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coding frame, but to all the phases of QCA, including sampling and data collection. Although they place a stronger focus on the traditional evaluation of the coding frame and its application, Katriina VASARIK STAUB, Marco GALLE, Rita STEBLER, and Kurt REUSSER (2019) also propose a number of steps of quality control applying to the entire research process, focusing especially on issues that arise when working in larger project groups (also BECKER et al., 2019, on challenges of conducting QCA in a group). [53]

A final challenge raised by Annette HOXTELL (2019) concerns the future of the method in the context of the evermore prevalent use of text mining and 'big data'. She argues that at least the semi-automation of QCA is actually quite feasible and provides a number of examples of the automation process that are currently already being implemented. [54]

Taken together, challenges in applying QCA seem to arise throughout the entire research process, ranging from adapting the method to specific research questions to ways of working with the results of QCA. The contributors demonstrate remarkable creativity in adapting the method to their needs, especially by drawing upon ways of combining it with other methods and approaches, such as the research program subjective theories or methods from linguistics. Considering the diverse nature of the research questions pursued and the contexts in which QCA is applied, it is not surprising that some contributors focus primarily on the more 'quantitative' characteristics of the method, for instance its systematic nature, whereas others seek to extend its 'qualitative' elements. Moreover, it becomes visible that certain challenges are the result of adapting the method to conditions characteristic of today's research environments, such as working in larger groups and working cross-nationally with multilingual and multicultural material. [55]

4. Conclusions and Outlook

We started putting together this issue with a number of questions in mind, derived from a literature review and from questions raised by participants at the 2016 conference "Qualitative Inhaltsanalyse – and Beyond?" held in Weingarten, Germany. We want to leave the discussion of the majority of these questions to our introduction to Part II of this special issue, but would nevertheless like to highlight a few points that seem relevant in the present context. [56]

One of our key questions was about the status of QCA as a hybrid method combining qualitative and quantitative elements, or a more qualitative type of QCA with perhaps additional qualitative elements. Our examination of the recent literature already showed this question to be interrelated with a second concern of ours, namely, wanting to bring together the international and the German speaking discourse on QCA, and we could again see this interrelation in the contributions we received and brought together in Part I of this special issue. In the past, different variants of QCA have been described in the literature (HSIEH & SHANNON; 2005; KUCKARTZ, 2014b; MAYRING, 2014; SCHREIER, 2014a), and it becomes clear that this variation is not only about different strategies of

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building categories, but is equally about the overall conceptualization of QCA. It is not the case that there is one single QCA that is conceptualized as either hybrid or predominantly qualitative. Instead, there are different versions of QCA, with MAYRING representing and advocating a hybrid version of the method, while other authors see it as predominantly qualitative and explore ways of strengthening such qualitative elements. The view of QCA as a predominantly qualitative method is especially prevalent among international authors (ELO & KYNGÄS, 2008; GRANEHEIM et al., 2017), and this is also the case for the international contributors to this issue, such as MARVASTI (2019), DEVI PRASAD (2019), or VAISMORADI and SNELGROVE (2019). This is clearly an important reason why there has been little dialogue between authors from German-speaking countries and international authors writing about QCA: For the most part, they have been writing about different versions of the method. We argue here that this variety of different versions of the method in the literature may constitute an advantage rather than a disadvantage. Recognizing that there is not one QCA can be the starting point for deliberately developing these different versions of the method with their respective theoretical or epistemological and ontological foundations (or lack thereof), and their respective characteristics—as GLÄSER and LAUDEL (2019) have already done in this issue for one such version of the method. [57]

The second question we pursue in Part I of this special issue on QCA concerns the challenges that researchers face in applying the method and the potential for future developments. As we already emphasize above, we find it interesting that such challenges arise throughout the entire research process. It is therefore not the case that specific elements of QCA are in need of more in-depth elaboration. Instead, researchers are faced with a variety of challenges. Some of these arise from methodological goals and the question of how QCA can be used to advance that goal (e.g., carrying out a systematic review: SCHNEPF & GROEBEN, 2019; generating new theoretical knowledge: ŽELINSKÝ, 2019). Others are based on current developments in social science research, such as the use of multilinguistic material (KULL et al., 2019; REINKE DE BUITRAGO, 2019) or working in large project groups (BECKER et al., 2019; VASARIK STAUB et al., 2019). Many authors do indeed use the challenges they encounter as starting points for the further methodological development of QCA. Interesting ideas include making use of sequenced ranking as an alternative to frequency analysis for determining the importance of categories (DRIESEN, 2019), using interrater agreement as a tool for tracking divergent interpretations of categories among coders (BECKER et al., 2019), identifying conditions under which categories need not be mutually exclusive (SPENDRIN, 2019), employing abductive strategies in creating categories (ŽELINSKÝ, 2019; also RUIN, 2019), or developing a comprehensive framework for evaluating studies in which QCA is used (ROLLER, 2019; VASARIK STAUB et al., 2019). To meet these challenges, combinations of QCA with other methods are sometimes used, such as qualitative structural analysis (HACK, 2019) and sequenced ranking (DRIESEN, 2019). [58]

We mentioned earlier that we found it interesting to bring together conceptual and applied contributions concerning QCA in Part I of this special issue, assuming

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that conceptual discussions of research methods are ultimately linked to research practice. Indeed, we can identify an important convergence between those two sections: The variety of conceptualizations of QCA by the authors in the first section is reflected by the variety of applications, corresponding challenges, and creative developments of the method towards meeting these challenges. In Part II, we will further explore the various contexts in which QCA is used and how, based on these different contexts, distinct versions of the method where their respective characteristics are emphasized are likewise required. One form will not follow all functions, and there is a clear need for more than one QCA. [59]

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