

## Qualitative Content Analysis: Disciplinary Perspectives and Relationships between Methods—Introduction to the FQS Special Issue "Qualitative Content Analysis II"

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

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**Abstract:** In this article, we introduce Part II of the special issue on qualitative content analysis (QCA). To begin with, we provide a short summary of the rationale underlying both parts of the special issue and present some core conclusions based on Part I. Whereas in Part I we combined contributions by authors taking an inside perspective on QCA, focusing on conceptualizations of the method as well as challenges in applying it, in Part II we put together articles by authors who take more of an outside view. Like Part I, Part II is divided into two sections. In the first section, papers are presented in which QCA is employed in different disciplines. It can be seen that methodological requirements vary between disciplines, and that this results in different ways of using and adapting QCA. In the second section are contributions in which the relationship between QCA and other methods / approaches is examined or illustrated. Comparisons are made between QCA and Grounded Theory Methodology only, whereas combinations can be found with a variety of methods / approaches. We end by summarizing our main conclusions concerning the goals we pursued with this special issue, and highlighting some open questions and suggestions for future methodological discussion and development of QCA.

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## 1. Introduction

In Part II of this special issue on qualitative content analysis (QCA; overviews: KUCKARTZ, 2018; MAYRING, 2015; SCHREIER, 2014; STAMANN, JANSSEN & SCHREIER 2016), we continue the work we began with the conference "Qualitative Inhaltsanalyse – and Beyond?" in 2016 (JANSSEN, STAMANN, KRUG & NEGELE, 2017), and the publication of Part I in September, 2019 (JANSSEN, STAMANN, SCHREIER, WHITTAL & DAHL, 2019). The overall goal is to advance the discussion about QCA both among its representatives and within the broader landscape of qualitative research. In our introduction to Part I (SCHREIER, STAMANN, JANSSEN, DAHL & WHITTAL, 2019), we identified four core trends and topics in the current literature about the method. A first topic

is related to the conceptualization of QCA as either a hybrid procedure, where elements from both the qualitative and the quantitative research traditions are combined, or of QCA as a purely qualitative method. Second, we pointed out some discrepancies between the German and the English speaking discourse on QCA, in which German speaking authors tend to focus on QCA as a hybrid method, whereas English speaking authors are more likely to emphasize the qualitative elements. It is only recently that connections between the international and the German speaking discourse have been made. A third topic relates to the question regarding to what extent methodological foundations of QCA can be identified. On the one hand, several authors point to diverse foundations, for instance in hermeneutics or in communication studies (KUCKARTZ, 2014a; MAYRING, 2015). On the other hand, there is no consensus on this issue, and key questions concerning, for example, the exact meaning of terms such as "text" or, indeed, "meaning," have so far not been answered. Fourth, we find it striking that researchers make frequent use of QCA, but often neglect to provide the details of how exactly they employed the method. [1]

As we describe in our Introduction to Part I (SCHREIER et al., 2019), we took up these four points in our call for papers for the special issue. In addition, and based on the above mentioned conference "Qualitative Inhaltsanalyse – and Beyond?," we also included questions concerning the use of QCA in different disciplines and in the context of current developments, such as mixed methods and big data. In order to emphasize the importance of reporting the details of how exactly QCA was implemented, we asked for so-called shopfloor reports in addition to regular contributions. Shopfloor reports were conceptualized as shorter papers in which the focus was on challenges in applying the method and how these challenges were overcome. Moreover, we invited both authors who took an "inside" view of the method as proponents of QCA and authors who examined the method from the "outside" perspective of a different method or approach. In total, 15 regular papers, five invited papers, and 14 shopfloor reports were accepted for publication. In organizing the special issue, we divided the papers into four sections: conceptualizations of QCA; challenges and developments in applying QCA; discipline-specific approaches to QCA, and relationships and interconnections between QCA and other methods and approaches. [2]

In Part I, we presented papers from the first two sections, i.e., contributions related to different conceptualizations of QCA and different perspectives on these conceptualizations, as well as papers about challenges in applying the method. Together, the authors from these two sections provide an inside view on QCA. In our Introduction to Part I, we concluded that QCA continues to be conceptualized in different ways, ranging from a hybrid view of the method (taken, for example, by MAYRING, 2019, and by SCHNEPF & GROEBEN, 2019; see also GLÄSER & LAUDEL, 2019, on extractive QCA in the context of discovering causal mechanisms) to a variety of qualitatively oriented versions, with international contributors typically regarding the method as qualitative rather than hybrid (DEVI PRASAD, 2019; MARVASTI, 2019; VAISMORADI & SNELGROVE, 2019). Authors who made suggestions for developing qualitative elements of QCA

focused, for example, on emphasizing case orientation (KUCKARTZ, 2019) or on providing an interpretative methodology for creating categories (RUIN, 2019). We also saw this multiplicity of conceptualizations of QCA reflected in the various practical challenges and the resulting developments that were brought forth (SCHREIER et al., 2019). Difficulties in applying the method were found throughout the entire process of conducting QCA, including the need to adapt QCA to specific research goals (such as generating new theoretical knowledge: ŽELINSKÝ, 2019), working with multilingual material (KULL, PETERSEN & CAMP, 2019; REINKE DE BUITRAGO, 2019), determining the importance of categories (DRIESEN, 2019), or finding suitable evaluation criteria (ROLLER, 2019; VASARIK STAUB, GALLE, STEBLER & REUSSER, 2019). A number of interesting solutions involving adaptations of the method were presented (e.g., identifying conditions under which categories need not be mutually exclusive: SPENDRIN, 2019; using interrater agreement for keeping track of different interpretations of categories among coders: BECKER, MOSER, FLESSNER-JUNG & HANNOVER, 2019; or combining QCA with other methods such as qualitative structural analysis: HACK, 2019). Based on the diversity of solutions presented in this section, these contributions can be taken to illustrate KNOBLAUCH's statement "if someone carries out a qualitative project using an established method, they will usually develop this method further" (2013, §8)<sup>1</sup>. [3]

In the current Part II of this special issue, we further explore the various conceptualizations of and contexts in which QCA is used, but change the perspective from an internal to an external one (SCHREIER et al., 2019, §35). Like Part I, Part II is divided into two sections, corresponding to the above two external perspectives on QCA, namely: what are discipline-specific contexts in which QCA is used, and can discipline-specific adaptations of QCA be identified? (Section 2.1), and 2) what is the relationship between QCA and other research methods and approaches (Section 2.2)? Here, QCA is looked at from the outside against the background of a shared methodological discourse. We conclude by summarizing core findings and pointing out areas for future discussion and development (Section 3). [4]

## **2. Structure of Part II of the Thematic Issue**

In the following subsections, we provide a brief overview of the contributions included in Part II and describe how these are related to articles published in Part I of the special issue (JANSSEN et al., 2019). [5]

### **2.1 Discipline-specific approaches to QCA**

In the contributions with a discipline-specific focus, the range of disciplines across which QCA is used today becomes visible, including, among others, educational research, subject didactics, cultural studies, psychology, and the health sciences. Michaela GLÄSER-ZIKUDA, Gerda HAGENAUER and Melanie STEPHAN (2020), as well as Barbara MUSLIC, Anne GISSKE and Viola HARTUNG-BECK

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<sup>1</sup> All translations from texts in languages other than English are our own.

(2020), approach the use of QCA from the perspective of educational research (see also the contributions in both parts of the special issue by DRIESEN, 2019; EPP, 2020; GLÄSER & LAUDEL, 2019; KANSTEINER & KÖNIG, 2020; KELLER-SCHNEIDER, 2020; KINDERMANN, 2020; RUIN, 2019; SPENDRIN, 2019). Mark-Oliver CARL and Friedemann HOLDER (2020) do so from the subject didactics perspective of reception aesthetics. [6]

GLAESER-ZIKUDA et al. (2020) highlight the ways in which QCA can be employed to combine elements from qualitative and quantitative research traditions, especially the use and the combination of inductive, data-driven, and deductive, concept-driven categories. They argue that this makes the method especially suitable for educational research, particularly in the context of mixed methods designs. MUSLIC et al. (2020) likewise emphasize the usefulness of bringing together data- and concept-driven categories in educational research. At the same time, the authors argue that based on the questions prevalent in educational research, adaptations of the method become necessary so that its qualitative components are strengthened. More specifically, they suggest complementing the typical cross-case perspective with a within-case perspective, allowing for a more in-depth analysis in a case study context. Manuela KELLER-SCHNEIDER (2020) similarly emphasizes the role of case studies in educational research. She combines case-oriented QCA and case-oriented quantitative data, and illustrates how this procedure can be used to present cases in their entirety. In both articles, the authors thus focus on one of the most prominent issues in QCA methodology, namely the question of to what extent QCA can be applied to case-oriented studies (JANSSEN et al., 2017; KUCKARTZ, 2018). [7]

In their contribution, CARL and HOLDER (2020) concentrate on a specific area of educational research, namely literary didactics and the reception of literary texts. They argue that research in this area is faced with what they term the challenge of double hermeneutics: that understanding the reader's interpretation of a literary text in turn presupposes an understanding of the literary text itself. From this they derive more specific challenges to applying QCA to studies of literary understanding, relating to the definition of the appropriate context unit, the types of categories needed, and the kinds of inferences that can be made on the basis of QCA. Discipline-specific challenges in applying QCA are also discussed in the contributions by Emilia SOROKO and Michal DOLCZEWSKI (2020) and by Stefan BAUERNSCHMIDT (2020). SOROKO and DOLCZEWSKI examine the use of the method in clinical psychology, particularly in the explanatory assessment of personality disorders. In order to address the specific challenges of an explanatory focus, they suggest—in addition to pointing out the importance of using both data- and concept-driven categories—that researchers focus more on exploring patterns and relationships between categories, thereby strengthening the qualitative elements of the method. Based on additional challenges, they further draw attention to another specifically qualitative element of the method that is rarely discussed in the literature, namely, the role of the interpretive element in the coding process. BAUERNSCHMIDT approaches QCA from the perspective of cultural studies and the concepts of communication and meaning, with special emphasis on latent aspects of meaning and the importance

of taking the pragmatic aspects of these concepts into consideration. He argues that a distinct and new type of QCA is required for the specifics of the discipline, a type of QCA that is characterized by openness, contextualization, triangulation, and informed by multiple perspectives. [8]

The use of QCA in health research is examined in a systematic review by Marlen NIEDERBERGER and Stefanie DREIACK (2020; on using the method towards a systematic review, see also SCHNEPF & GROEBEN, 2019), in which they take a double perspective: they make use of QCA in order to examine the use of the method in the discipline, exploring in particular the underlying conceptualization of qualitative research. They show that while the use of the method is widespread, methodological reflection and an interpretive analysis of latent meaning are rare. In this way, they argue, the qualitative element of these studies is unnecessarily reduced to a mere description of qualitative material. With their contribution the authors complement the intense international discourse on the methods and methodology of QCA in the health sciences (BENGTSSON, 2016; ELO & KYNGÄS, 2008; ELO et al., 2014; GRANEHEIM & LUNDMAN, 2004; GRANEHEIM, LINDGREN & LUNDMAN, 2017; HSIEH & SHANNON, 2005). In addition to the disciplines already mentioned, Part I of this special issue contains contributions informed by sociology (RUIN, 2019), musicology (KULL et al., 2019), political science (ŽELINSKÝ, 2019), and history (WERNER, 2020). [9]

It becomes evident in this summary of contributions from a disciplinary perspective, that the majority of these articles have been written by authors from educational research (including subject didactics)<sup>2</sup>. It is also notable that communication studies, the discipline in which content analysis was first developed, is not represented in the current issue. This may well be the result of the continuing predominance of *quantitative* content analysis in the field, leaving little room for the development of a specifically qualitative version of the method (KUCKARTZ, 2019). Finally, it is noteworthy that in addition to the disciplines in which QCA is traditionally widespread (such as sociology, psychology, educational research, or qualitative health research), others such as political science, history, cultural science, or musicology are also represented here. Researchers in political science, which is traditionally more of a quantitative field and dominated by a post-positivist stance, gradually seem to be opening up to qualitative approaches and methods such as QCA. The quantitative orientation in the field is, however, reflected in the goal of explanation that gives rise to the challenge of developing a version of QCA that is suitable for explanatory purposes (GLÄSER & LAUDEL, 2019). [10]

It also becomes clear that researchers from different disciplines do indeed have different methodological requirements and adapt QCA accordingly. In educational research, case study designs are frequently employed—hence the emphasis of both MUSLIC et al. (2000) and KELLER-SCHNEIDER (2000) on developing the case-oriented aspects of QCA (for a discussion of the methods and methodology

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2 This may in part be due to the background of several of the co-editors of this special issue in the discipline, with the call for papers having been distributed via discipline-specific communication channels.

of this combination, see KOHLBACHER, 2006). The question regarding to what extent QCA can be used not just across, but also within cases seems especially relevant considering the current debate about the status of QCA as a genuinely qualitative research method (HITZLER, 2016; MEY, 2016; STRÜBING, 2017). In the application of QCA, the focus is usually not on cases, but on categories and on generalized results across cases. Yet case orientation can be considered one of the core characteristics of qualitative research (LAMNEK & KRELL, 2016; MAYRING, 2016), and KUCKARTZ (2019) has suggested developing the case-related elements of QCA in order to more firmly establish it as a genuinely qualitative research method. MUSLIC et al. (2020) and KELLER-SCHNEIDER (2020) both contribute towards this goal. The use of QCA in disciplines that originate in the humanities more or as much as in the social sciences—such as cultural studies, literary didactics, or history—, on the other hand, comes with a different set of challenges, especially concerning understanding and latent meaning (BAUERNSCHMIDT, 2020; CARL & HOLDER, 2020). These authors draw attention to assumptions often underlying the use of QCA in the social sciences, such as focusing on semantics to the exclusion of the pragmatics of meaning, or the extent to which context is or can be taken into account. CARL and HOLDER (2020) on the one hand, and BAUERNSCHMIDT (2020), on the other hand, differ in one important respect in how they adapt QCA to their specific disciplines: while CARL and HOLDER argue for modifications within the existing QCA methodology, BAUERNSCHMIDT proposes cultural QCA as a new and—in his words—"eigenständige" [independent] research method (2020, Abstract). It is not for us to decide which of these ways of dealing with discipline-specific aspects in conducting QCA is more promising in the long run. Having both of them represented in this special issue can serve as a starting point for future discussion. [11]

Overall, the contributors to this special issue who discuss QCA from a discipline-specific perspective demonstrate that, in order to make QCA suitable for their respective contexts, adaptations are necessary, with an emphasis on either the qualitative or quantitative aspects of the method. This may even go so far as to do away with categories altogether (BAUERNSCHMIDT, 2020), although this in turn raises the question as to whether a type of QCA that is not category-based can still legitimately be termed a type of content analysis. Perhaps research questions concerning context-specific meaning can only be answered by using other, more interpretive and reconstructive methods. [12]

## **2.2 Relationships between QCA and other methods and approaches**

In the second subsection, we have brought together contributions with a focus on comparing QCA to or combining it with other methods and approaches. Considering that the term "coding" is used in both QCA and grounded theory methodology (GTM), and that "categories" in QCA are sometimes referred to as "codes," it is not surprising that one such comparison concerns the relationship between QCA and GTM (see the contributions by BUECKER, 2020, and by KUEHLMAYER, MUCKEL & BREUER, 2020). In Part I of the special issue, MARVASTI (2019) emphasized the similarities between both approaches. In Part

II, KUEHLMAYER et al. (2020), on the other hand, compare QCA and GTM in terms of "instructionality," operationalized as precision and prescriptiveness. While they take into account the different versions of each of the methods / approaches, they nevertheless come to the conclusion that QCA is overall higher in terms of both precision and prescriptiveness. Nicola BUECKER (2020) compares QCA and GTM with regard to the ways categories and codes are developed and applied, and in terms of the results. While there are obvious differences, for example, concerning the data-based approach to developing codes in GTM compared to the predominantly mixed deductive-inductive procedure of generating categories in QCA, these differences are by no means as clear-cut when different variants of the methods are taken into account. Yet KUEHLMAYER et al. (2020) caution readers when it comes to combining elements from QCA and GTM, and emphasize the importance of methodological reflection in such cases. [13]

The authors of another three contributions discuss QCA in relation to the research program subjective theories (GROEBEN & SCHEELE, 2001). As a first step in the research program, an interview is conducted; based on the interview, the researcher extracts core concepts which are then connected to each other by a set of relations, so as to constitute the interviewee's subjective theory on the chosen topic. The exact procedure in relating the core concepts to each other and the set of relations used can vary. While the authors of the above contributions on QCA and GTM compare the two methods / approaches, authors discussing QCA and the research program subjective theories focus on the potential of combining the two. While QCA is typically used to create categories across cases, subjective theories are generated at the individual level and thus represent the cognitive structure of *one* person. Sabine LANG and Corinne RUESCH SCHWEIZER (2020) take up the methodological question of how to bring subjective theories to the cross-case level, i.e., how to generate aggregate subjective theories across individuals. They suggest that QCA can be used to generate concept categories that can be applied across individuals, and that this procedure can be supplemented by constructing typologies (KELLE & KLUGE, 2010; KLUGE, 2000) so as to capture relations between concepts across individuals. In their shopfloor reports, André EPP (2020) and Katharina KINDERMANN (2020) likewise see QCA as a method that has the potential to contribute to the research program subjective theories. KINDERMANN argues that it is not yet sufficiently specified in the program how exactly the concepts that are to be included in each individual subjective theory are arrived at, and she suggests that QCA can be used as a systematic procedure for extracting concepts. At the same time, it becomes clear that to do so, the method needs to be adapted in several respects, for instance in terms of generating categories at the individual level and not across cases. KINDERMANN thus considers QCA and the research program subjective theories to be complementary to each other. EPP similarly suggests using QCA for generating the concepts within individual subjective theories from interviews. EPP, however, is not only concerned with manifest knowledge, but also with latent and structural knowledge that is not and in some cases cannot be made explicit. In order to make such implicit structural knowledge accessible to generating concepts, EPP suggests combining QCA

with BRONFENBRENNER's ecosystemic developmental model (1981), and reconstructing concepts at different structural levels. EPP thus sees QCA as part of a methodological triad, together with the research program subjective theories and BRONFENBRENNER's approach. [14]

Katja KANSTEINER and Stefan KÖNIG (2020) explore and systematize three different rationales for and roles of QCA in various types of mixed methods designs. To illustrate this, they use examples from their research in educational sciences and sports science. Regarding one of our goals of the special issue, to bring the international and the German-speaking discourses on QCA together, they conclude that QCA is one of the main methods used

"in the qualitative strands of many MMR [mixed methods research] studies. This seems to be particularly true for studies conducted by researchers from Germany, which increasingly leaves a mark on the international MMR discourse. In contrast, in the English-speaking contributions it appears less specific which qualitative method is applied, since researchers hardly ever use the term QCA" (§45). [15]

The issue of QCA and mixed methods is also taken up within the perspective of educational research, in particular by GLAESER-ZIKUDA et al. (2020; on the role of QCA in the context of mixed methods, see also MARVASTI, 2019; MAYRING, 2019; NIEDERBERGER & DREIACK, 2020, and SOROKO & DOLCZEWSKI, 2020; for an additional example of combining QCA and mixed methods see KELLER-SCHNEIDER, 2020). Finally, WERNER (2020) suggests integrating QCA and methods from conceptual semantics into the context of historical research (for another example of combining QCA with methods from linguistics, see DRIESEN, 2019). [16]

Several other authors also mention ways of combining QCA with other methods, without always discussing these in greater detail. This applies in particular to the combination of QCA and the constructing of typologies, for example, in the contributions by LANG and RUESCH SCHWEIZER (2020), by KELLER-SCHNEIDER (2020) and by MUSLIC et al. (2020; see above on type-building QCA according to KUCKARTZ, 2014a). In yet other contributions, QCA has been combined with social network analysis (qualitative-structural analysis: HACK, 2019; see also the use of networks by KELLER-SCHNEIDER, 2020), and in the previous section we already mentioned the combination of QCA with case study designs in the context of adapting QCA to the specific methodological requirements of educational research (KELLER-SCHNEIDER, 2020; MUSLIC et al., 2020; see Section 2.1). [17]

Authors who discuss QCA in relation to other methods and approaches thus focus on either comparing QCA and the other method / approach, or on combining the two. The only method / approach discussed from a comparative perspective is GTM (BUECKER, 2020; KUEHLMAYER et al, 2020). Despite the obvious methodological differences between QCA and GTM, there are clearly similarities as well, especially when the different variants of the methods / approaches are taken into account. This makes it all the more important to clearly



spell out the methodological differences and the conditions under which one method or the other is more suitable. The majority of the authors of the contributions in this section, however, focus on combining QCA with another method / approach, with the research program subjective theories and case studies mentioned most often (Section 2.1). There is, however, a difference in the way various methods / approaches are used in combination with QCA. Where the research program subjective theories is concerned, QCA is utilized to solve a specific methodological problem from within that approach, e.g., generating aggregate subjective theories (LANG & RUESCH SCHWEIZER, 2000) or systematically extracting the concepts from interviews that are then to become part of the subjective theories (KINDERMANN, 2000). Where other methods such as conceptual semantics (WERNER, 2020) are combined with QCA, this is done to solve a problem that arises in the context of carrying out QCA; this also applies to the examples of combining QCA with other methods in Part I of the special issue, such as qualitative structural analysis (HACK, 2019) or sequenced ranking (DRIESEN, 2019). In the one case, QCA is used in the service of another approach / method, namely, the research program subjective theories; in the other case, the other method / approach is used in the service of QCA. In both situations, adaptations of QCA are typically required, and these can serve as the basis for deriving new ideas for further development of the method. [18]

### **3. Conclusions and Outlook**

With this special issue, we pursued three goals: 1. taking up some of the methodological issues in the current discussion of QCA, 2. addressing the gap between authors writing within the international and the German-speaking discourse about the method, and 3. exploring problems and solutions in the context of applying QCA, especially with a view to advancing its methodological development. Because we have already addressed the second and the third of these goals in our Introduction to Part I (SCHREIER et al., 2019), we will focus here on the first of our goals, and address issues related to the other aims only to the extent that they are related to methodological questions. [19]

Methodological concerns that we wanted to address in this special issue include the conceptualization of QCA (as a hybrid or a qualitative method), to what extent a methodological foundation of QCA can be identified, how QCA is handled in different disciplinary contexts, the relationship between QCA and other qualitative methods, and the role of QCA in the context of mixed methods and big data, as well as associated challenges. What strikes us the most, both in Part I and Part II of this special issue, is the large variety of conceptualizations and uses of QCA that we found across all contributions. We will come back to this point repeatedly, as this variety plays a fundamental role in the discussion of the other concerns. [20]

Regarding the use of QCA in different disciplines, it is unfortunate that in both parts of the special issue, contributions from educational research are over-represented in relation to those from other disciplines—especially considering that the origin of QCA is in communication research and that the method is widely used in many disciplines (KUCKARTZ, 2014a; SCHREIER, 2012). Nevertheless,

there is enough variety included here (e.g., psychology, health sciences, cultural studies, history, political science) to conclude that the different methodological goals and foci of the various disciplines are indeed reflected in the different uses and adaptations of QCA (such as employing QCA in within- and cross-case analysis in educational research, adapting QCA in the direction of context specificity and pragmatics of meaning in cultural studies, etc.). This exemplifies the above-mentioned variety of conceptualizations of QCA from a disciplinary perspective. As a next step, it would be interesting to conduct meta-analyses (SCHNEPF & GROEBEN, 2019) or systematic reviews, as NIEDERBERGER and DREIACK (2020) have done in this issue for qualitative health research, summarizing how QCA has typically been used in different disciplines. On this basis, it would then be possible to map out the most typical research goals and corresponding designs, and to systematize adaptations of QCA that would be required within these different disciplinary contexts. These could serve as a kind of road map for future developments of the method in various disciplines. [21]

We already mentioned that one reason for the overrepresentation of contributions from educational research might be our own affiliation with the discipline. Another reason might be that MAYRING systematically developed the method as a psychologist in an educational science project at a University of Education. It would be interesting to systematically trace the process of how QCA was developed within and across disciplines from a historical perspective. Furthermore, QCA is often used in disciplines that are not regarded as *social* sciences in the narrow sense, such as psychology, but also in medicine (FORMAN & DAMSCHROEDER, 2007), economics (SEURING & GOLD, 2012), and cultural studies (BAUERNSCHMIDT, 2020; CARL & HOLDER, 2020). Within the discourse on qualitative methods—including this journal, for example—there seems to be an implicit assumption that the methodological discussion of qualitative methods goes along with applying them in the social sciences. But this need not necessarily be the case, and by tracing the development of QCA over time and across disciplines, we would not only shed light on this one method, but also on the ways in which the qualitative social sciences are methodologically connected to and possibly influenced by both the natural and the cultural sciences. [22]

Concerning the relationship between QCA and other qualitative research methods and approaches, QCA was *compared* to only one, namely GTM (BUECKER, 2020; KUEHLMAYER et al., 2020), yet *combined* with a large number of other methods / approaches, including the research program subjective theories (LANG & RUESCH SCHWEIZER), case study designs (KELLER-SCHNEIDER, 2020; MUSLIC et al., 2020), building typologies, network analysis, and many more. Again, we find the variety of contexts in which QCA is used in cross-method applications striking, as well as the many different ways in which the method is modified in the course of these combinations. At the same time, we consider it equally significant that we did not receive any contributions on the combination of QCA with other qualitative methods. QCA was not combined, for example, with hermeneutics (although such a combination exists:

MATHES, 1992), with discourse analysis (on the differences in background assumptions: SCHNEIDER, 2016), or with the documentary method. [23]

Although there are considerable methodological differences between QCA and the documentary method, for example, when carrying out formulating interpretations as a part of the documentary method, researchers paraphrase and generalize text passages (for an example see BOHNSACK & NOHL, 2013). Thus, similar text analytical techniques are used in both methods. To our knowledge, there are no rules or instructions for doing so, for example in a volume on documentary research practice (BOHNSACK, NENTWIG-GESEMANN & NOHL, 2013) or an introductory text for beginners (ASBRAND, 2011). In the latter text, the methodical step is explicitly referred to as "paraphrasing" several times (pp.7f.), without providing any specific information on how to paraphrase. Although paraphrasing is not a genuine QCA technique, it and other techniques of abstraction have been described in detail by proponents of the method (KUCKARTZ, 2018; MAYRING, 2015; SCHREIER, 2012). A discussion around the extent to which techniques are used for the formulating interpretation in particular and how instructions from within QCA can be helpful here, would be immensely valuable. Reference to and use of the relevant resources seem particularly important with regard to quality criteria and teaching and learning of research methods. With these remarks, attention is drawn to open questions concerning methods and methodology, which, in our opinion, need to be addressed, best by experts in both methods. [24]

Considering the many different versions of QCA described in the contributions to this special issue, it is hardly surprising that it is not possible to identify a common methodological background. Indeed, we find different positions on whether this is in fact desirable. On the one hand, VAISMORADI and SNELGROVE (2019) argue that it would contribute to the advancement of QCA within the broader (international) landscape of qualitative methods and methodology to develop such background assumptions. On the other hand, KUCKARTZ (2016, 2019) points out that QCA is not a methodology at all, but a method, and this is what makes it possible to flexibly use QCA in different research contexts and purposes. If we look at the many ways in which QCA is adapted to the methodological requirements of various disciplines, and the ways in which it is modified when combining it with other methods and approaches in the contributions to this special issue, we tend to agree with KUCKARTZ (2016): the very lack of a common methodological background may well be what makes the method so adaptable (JANSSEN et al., 2017; MUSLIC et al., 2020). This does not mean, of course, that the researchers' methodological position in carrying out a given study is irrelevant. When presenting their methods, the underlying methodological stance also has to be made explicit—no matter whether QCA or any other method is used. While there may be no explicit set of background assumptions, however, authors like BAUERNSCHMIDT (2020), who have attempted to modify QCA for use in cultural studies, point out that there are limits to how far QCA can be adapted—and in the process indicate that implicit assumptions that have not yet been systematically spelled out do indeed exist. These include, for example, conceptualizing meaning in purely semantic terms, to the exclusion of the

pragmatic dimension, and taking context into account only in a narrow sense of the term. When BAUERNSCHMIDT adapts the method in line with his considerations, however, seeking to determine meaning in a pragmatic sense, the resulting method is one that he himself calls "independent" (Abstract). In other words, if these considerations are taken into account, the advantages of using QCA such as being able to analyze the purely semantic meaning of comparably large amounts of text are lost. MAYRING (2019) argues along similar lines when he criticizes recent developments in the direction of a more qualitative QCA on account of giving up such advantages. With this special issue, we hope to initiate a discussion about how far QCA can be adapted to varying disciplinary requirements, while remaining QCA at the core. We further hope that discussions about what that core is exactly will contribute to identifying foundational methodological assumptions that have so far remained largely implicit. [25]

A final methodological issue that we wanted to address concerns the relationship between QCA and recent methodological developments in the areas of mixed methods and big data. With respect to mixed methods, it seems that QCA would be an especially promising method to integrate into mixed methods designs (CRESWELL, 2014; KUCKARTZ, 2014b). To the extent that QCA has been developed as a hybrid method, in which elements from both the qualitative and the quantitative research traditions are combined, QCA can count as an example of a mixed method for data analysis (BURZAN, 2016; FIELDING & SCHREIER, 2001; GROEBEN & RUSTEMEYER, 1994; MAYRING, 2012; SCHREIER, 2019). Focusing on categories which—like variables—are employed across cases can serve as a hinge connecting qualitative and quantitative data (examples in MAYRING & GLÄSER-ZIKUDA, 2008; MAYRING, HUBER, GUERTLER & KIEGELMANN, 2008). To the extent that a more qualitative version of QCA is applied (with a stronger focus, for example, on within-case analysis), the method will be part of the qualitative strand of a mixed methods design. Both these ways of using QCA in different types of mixed methods designs are described by KANSTEINER and KÖNIG (2020) in this issue, and other authors also emphasize the role of QCA in mixed methods research (GLÄSER-ZIKUDA et al., 2020; for further discussions and examples see: KELLER-SCHNEIDER, 2020; MARVASTI, 2019; MAYRING, 2019; NIEDERBERGER & DREIACK, 2020; SOROKO & DOLCZEWSKI, 2020). As we already mention in our Introduction to Part I (SCHREIER et al., 2019), the question of how QCA can be employed in big data research, on the other hand, is only touched upon once in this special issue, in the context of automation (HOXTELL, 2019). Further exploring and discussing the role of QCA within these current developments remains a task for the future. [26]

In addition to these methodological points that we mentioned in our call for papers, the contributors to this special issue drew our attention to another topic concerning the teaching of QCA. In their comparison between QCA and GTM in terms of instructionalness, KUEHLMAYER et al. (2020) conclude that the application of QCA is largely standardized and prescriptive (even though the prescriptions in some instances remain rather vague). What follows from this for

the learning and for the teaching of QCA?<sup>3</sup> Will there be a growing expectation, for example, in the teaching of qualitative methods, that students can acquire the method autodidactically and that this will be sufficient for the ability to competently apply the method?<sup>4</sup> Or can the descriptions of the creative handling of practical research problems in the "Challenges and Developments in Applying Qualitative Content Analysis" in Part I of the special issue be interpreted as a sign that it is not autodidactics that are needed, but other dialogical and creative settings of learning and teaching qualitative methods? Different suggestions for joint research practices have been made (BECKER et al., 2019; STAMANN & JANSSEN, 2019; VASARIK STAUB et al., 2019). There is still, however, a lack of concepts for teaching and learning QCA. Here, tensions may exist between curricular requirements, institutional practices and methodological as well as methodical requirements. [27]

Our second goal was to bring together the international and the German-speaking discourse on QCA. In addition to contributions from various German and English-speaking countries, we were able to attract authors from Norway and Poland. None of these, however, provided systematic contributions to the state of QCA in the individual countries, but instead describe their individual perspectives. KNOBLAUCH, FLICK and MAEDER (2005) regret that the Nordic countries are not represented in their *FQS* special issue on "Qualitative Methods in Europe." Perhaps the colleagues from these countries in our special issue and the works of Scandinavian authors referred to in a number of articles can help us find starting points to fill this gap (SCHREIER et al., 2019). It has also become clear, however, that the differences between the English-speaking and the German-speaking discourse on QCA are related to different conceptualizations and different applications of the method. Researchers from the English-speaking community often either conceive of QCA in more qualitative terms (DEVI PRASAD, 2019; MARVASTI, 2019; VAISMORADI & SNELGROVE, 2019), potentially entailing a blurring of the boundaries between QCA and various types of coding or thematic analysis, or avoid using the term "QCA" altogether (compare the conclusions in KANSTEINER & KÖNIG, 2020). Like KNOBLAUCH et al. (2005), we intend and hope to intensify discussions and initiate international collaborations with our *FQS* special issue on QCA. [28]

It is not only international authors who at times avoid the term "QCA" where it would be appropriate. It can happen that qualitative studies are presented in which genuinely qualitative content analytical techniques and procedural steps are used and described, but without reference to the respective QCA literature, as in this recent example:

"In the analysis of the interviews, for which WITZEL (2000) suggests various methods of analysis depending on the research interest and the thematic reference, I

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3 KNOBLAUCH (2013) discusses the increasing tendency towards standardization of qualitative methods. He warns that such standardization contrasts sharply with the original ideas of qualitative methods (also BREUER & SCHREIER, 2007; SCHREIER & BREUER, 2020).

4 See KNOBLAUCH (2007, §18) for critical comment on autodidactics in the learning and teaching of qualitative methods.

chose a thematically focused approach due to the extensive data material and for an initial content structuring: Then in the individual case analyses, concise interview statements were paraphrased and condensed in order to carve out central topics in the subsequent case comparison (BÖHM, LEGEWIE & MUHR 2008; WITZEL 2000)" (ARTMANN, 2019, §9). [29]

This passage contains two aspects for which naming and clarification of the qualitative content-analytical references seem appropriate. Content structuring is a standard procedure in QCA (MAYRING, 2015). Although the term can also be used in other ways, it would be important to clarify how the way it is employed here is different from how it is used in QCA, especially where intersubjectivity is concerned; this is necessary to determine whether the chosen procedure is indeed appropriate (STEINKE, 2012). By paraphrasing and condensing text passages, reference is made—once directly, once possibly—to two concrete techniques of summarizing in QCA (MAYRING, 2015): direct is the reference to the technique of paraphrasing, while "condensing" potentially refers to the further analytical steps of generalization and reduction. Here, it would be necessary to clarify what exactly was done, and how the procedures that were used are different from other procedures. Finally, a reference to codified techniques such as generalization and reduction would be preferable to a non-specific procedure (or one that is not presented in sufficient detail).<sup>5</sup> [30]

The cited passage above represents a more typical than exceptional case of describing how methods were used in qualitative studies. We consider this to be problematic due to quality criteria such as inter-subjectivity and explanation (LAMNEK & KRELL, 2016). We can only speculate about the reasons for not saying which methods were used or not providing any references. It may reflect the reluctance of representatives of other qualitative-interpretative methods to consider QCA a genuinely qualitative method (HITZLER, 2016; STRÜBING, 2017). Explicit references to analytical techniques such as qualitative content-analytical techniques might lead to questions regarding to what extent the alleged insurmountable differences between methods could be maintained, or what consequences the application of techniques that are in methodological tension with the chosen approach would have for the analytical validity and scope of the results. Here, too, we would like to further the discussion across methods. This should, however, necessarily take into account current qualitative content-analytical variants and currents within the discourse. With both parts of this special issue, if we could show one thing, it is that the conceptualization and practice of QCA are much more multifaceted than what is acknowledged in most textbooks, articles, critiques and debates. [31]

Our final goal was to describe typical challenges that arise when applying QCA, and to document solutions to these problems. To do so, we invited contributors to submit shorter shopfloor reports. We received a large number of such

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5 Despite the criticism of the procedure, it should be noted that at this point it cannot be decided whether it is (primarily) a problem of conducting a study or a problem of presenting results. In both cases, different questions would arise, but these would always affect the question of the quality of qualitative research.

contributions, and we consider these to be very fruitful. We can see that challenges arise across the entire research process (SCHREIER et al., 2019), and the authors provide detailed insight into their creative approaches to data analysis, documenting rich potential for advancing the development of the methods and methodology of QCA. In our opinion, such detailed descriptions are not given enough attention in many scientific publications, although this is how the creative and technical potential of working with the method becomes clear. As a possible next step, it would be desirable to systematize these and other publications of this kind, so as to make this information more widely available. [32]

When we started planning for this special issue, we had hoped that together with our contributors we would be able to provide answers to questions concerning, for example, the future development of a specifically qualitative QCA, its methodological foundations, the relationship between the international and the German-speaking discourse on QCA, or common challenges in conducting QCA and viable solutions. In some respects, we believe that we have succeeded. Authors from different disciplines and countries have shared their perspectives on the method. We have received many interesting suggestions for developing the specifically qualitative elements of QCA, for example, by integrating case-oriented elements into the analysis or by using abductive strategies in creating categories, and we have also seen how flexibly QCA can be integrated and combined with other methods and approaches. In many other respects, however, the contributions assembled in Parts I and II of this special issue have raised new questions. Instead of seeing starting points towards a common methodology emerge, for instance, we have realized that there is not even a consensus on whether such a common methodology would be desirable. Instead of narrowing the gap between the international and the German-speaking discourse on QCA, we have come to see that this gap is rooted in different conceptualizations of what QCA is and how it is related to other methods, both qualitative and quantitative. Above all, we have been impressed by the great variety of different versions of QCA presented in these contributions, and by how flexibly the core of QCA has been adapted to different requirements, both disciplinary and specific to concrete research questions. We thus consider this special issue to be a starting point for the further methodological development of QCA, and we hope that with this collection of contributions, we can stimulate further debate and discussion. [33]

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## Authors

[Margrit SCHREIER](#) is adjunct professor at Jacobs University Bremen. In her research, she focuses on qualitative research methods and methodology, mixed methods, media psychology, sensory processing sensitivity, and health-related topics.

Contact:

Margrit Schreier  
Jacobs University Bremen  
Psychology and Methods  
Campus Ring 1  
28759 Bremen, Germany

Tel.: +49 421 200-3300

Fax: +49 421 200-3303

E-mail: [m.schreier@jacobs-university.de](mailto:m.schreier@jacobs-university.de)

URL: <https://www.jacobs-university.de/directory/mschreier>

**Markus JANSSEN** is a teaching and research assistant and PhD candidate at the University of Education Weingarten. He primarily works in the field of initial teacher education and is chair of the interpretation group/ research workshop on qualitative content analysis at Weingarten University.

Contact:

Markus Janssen  
Pädagogische Hochschule Weingarten  
Kirchplatz 2  
88250 Weingarten, Germany

Tel.: +49 751 501-8570

E-mail: [janssen@ph-weingarten.de](mailto:janssen@ph-weingarten.de)

URL: <http://ew.ph-weingarten.de/das-fach/lehrende/janssen/>



*Christoph STAMANN* has been an academic staff member in educational science at the University of Education Weingarten until September 18, 2019. He and Markus JANSSEN were responsible for the research workshop on qualitative content analysis. Since September, 2019, he works as academic staff member at the University of Education in Karlsruhe, within the BMBF funded research and development project [LemaS](#).

Contact:

Christoph Stamann

Pädagogische Hochschule Karlsruhe  
Bismarckstraße 10  
76133 Karlsruhe, Germany

Tel.: +49 721 925-4962

E-mail: [christoph.stamann@ph-karlsruhe.de](mailto:christoph.stamann@ph-karlsruhe.de)

URL: <https://www.ph-karlsruhe.de/institute/ph/ew/lemas/mitarbeitende/>

*Amanda WHITTAL* is a health psychologist and research associate at Bocconi University in Milan, Italy, and the Institut für Allgemeinmedizin (ifam) in Düsseldorf, Germany. Her main research interests are in the fields of health policy and decision making for rare disease treatments, self-care and health behavior change interventions, and cultural influences on health. In her work she applies qualitative methods including content analysis, observational study, interviews, as well as mixed methods.

Contact:

Amanda Whittal

Centre for Research on Health and Social Care Management (CERGAS)  
Bocconi University  
Via Röntgen 1  
20136 Milan, Italy

E-mail: [amanda.whittal@unibocconi.it](mailto:amanda.whittal@unibocconi.it)

*Thomas DAHL* holds a PhD in science studies from Roskilde University Centre, Denmark. He worked as assistant professor at Department of Technology Studies (1994-1996) and Department of Philosophy (1996-98) at the University of Trondheim, before working as researcher and head of research at SINTEF (1998-2012), an independent research organization in Norway. Since 2012 he has been a professor in organization and management at the Norwegian University of Science and Technology.

Contact:

Thomas Dahl

Faculty of Social and Educational Sciences  
Department of Teacher Education  
Norwegian University of Science and Technology, 7491 Trondheim, Norway

Tel.: +47 98 29-1181

E-mail: [Thomas.dahl@ntnu.no](mailto:Thomas.dahl@ntnu.no)

URL: <https://www.ntnu.no/ansatte/thomas.dahl>

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