

## *Introduction*

# **The exploratory power of the qualitative approach and the case method for advancing management research, theory, and practice: An introduction to the Special Issue**

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Over the past decades, management scholarship has been shaped by a pronounced movement toward methodological sophistication, the accumulation of large-scale datasets, and the refinement of advanced quantitative techniques (Simsek *et al.*, 2025). These advances have substantially improved measurement precision and statistical rigour. Yet they have also, and perhaps inadvertently, encouraged a subtle displacement of scholarly attention: from what is theoretically meaningful, contextually embedded, and processually dynamic toward what is most readily measurable (Bergh *et al.*, 2022; Pillai *et al.*, 2024). The recurring risk is that the phenomena most central to management – decisions, behaviours, relationships, emergent practices, and the mechanisms that connect them – come to be approached through the lens of available instruments rather than through the substantive questions that motivate the inquiry.

It is against this backdrop that qualitative approaches, and case study research in particular, reassert their distinctive value. When carefully designed (Lindgreen *et al.*, 2021) and systematically conducted (Patton & Appelbaum, 2003), qualitative inquiry enables scholars to uncover underlying mechanisms, reconstruct complex processes, and examine phenomena within their

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real-life settings (Johnson *et al.*, 2006; Yin, 2014). Qualitative research is not a residual or merely preparatory mode of investigation, but a rigorous, human-centred way of dissecting complex social phenomena and generating in-depth, contextual insight (Lim, 2024). Across the domains of management – from human resource management and organizational behaviour to strategy, entrepreneurship, finance, operations, and corporate governance – many salient research questions concern processes and meanings that are difficult to capture fully through standardized indicators alone (Reinecke *et al.*, 2016; Hoorani *et al.*, 2019).

The case method occupies a particularly important position within this tradition. Its enduring appeal lies precisely in its capacity to investigate context-sensitive and processually dynamic phenomena in their full complexity, moving beyond experimental control to embrace, rather than suppress, the intricacy of real-world settings (Gummesson, 2017). Beyond its descriptive value, case-based inquiry has become an increasingly demanding vehicle for theory development (Eisenhardt, 1989; Eisenhardt & Graebner, 2007; Rouse *et al.*, 2025). Theory building from cases, meta-synthetic logics that aggregate qualitative evidence (Hoon, 2013), and the codified analytic procedures that have professionalized inductive research (Gioia *et al.*, 2013; Magnani & Gioia, 2023) have collectively raised both the ambition and the accountability of qualitative scholarship. The field's reflexive turn is evident in sustained attention to how qualitative research is conducted and evaluated (Pratt, 2025; Cañibano, Dudau & Muratbekova-Touron, 2025). Recent work on purposeful case selection, sample sizes, and saturation across the Gioia, Eisenhardt, and pattern-matching traditions (Bouncken, Czakon & Schmitt, 2026; Elmholdt, Gill and Nielsen, 2026) further reflects the continuing maturation of qualitative methodology (Aguzzoli *et al.*, 2024; Köhler, Rumyantseva & Welch, 2025).

Numerous scholars have nonetheless observed that the connection between method and theorizing deserves to be strengthened (Alvesson & Sandberg, 2013; Cornelissen, 2017; Wickert *et al.*, 2021; Kibler, Vaara & Laine, 2025). Much of the recent methodological debate has concentrated on quantitative and computational innovation, while comparatively less attention has been devoted to the theoretical potential of qualitative and case-based research. This omission is notable at a time when organizations face environments defined by digital transformation, artificial intelligence, sustainability pressures, and shifting stakeholder expectations. Such dynamics are frequently non-linear, path-dependent, and context-specific; understanding them calls for a holistic, longitudinal, and multi-actor perspective – one to which the case method is especially well suited (Gummesson, 2017).

This Special Issue takes up that challenge. Its purpose is to demonstrate

and further develop the role of qualitative research – and case study research in particular – as a methodological approach capable of generating theoretically meaningful knowledge and insights relevant to managerial practice. The contributions gathered here place qualitative single-, multiple-, and comparative-case designs at the core of theoretical advancement; several extend the methodological conversation itself, interrogating how mixed-methods integration and, increasingly, artificial intelligence reshape the conduct of case-based research. Taken together, they illustrate how methodological rigour, transparency, and reflexivity can be reconciled with the exploratory openness that gives qualitative inquiry its explanatory power.

The seven articles selected for this issue span diverse empirical domains, yet they converge on a common premise: that the phenomena worth explaining are those embedded in context, and that the case method is particularly well equipped to render them intelligible.

The issue opens with a methodological contribution by Razafimamonjy (this issue), which addresses a persistent weakness in mixed-methods scholarship: the tendency to juxtapose quantitative and qualitative strands rather than to integrate them. Working within a pragmatic paradigm and an explanatory sequential design, the author combines survey evidence from 137 employees with semi-structured interviews and focus groups across thirty firms in Fianarantsoa (Madagascar), mobilizing methodological, source, and analytical triangulation to study the management of Generations Y and Z. The value of genuine integration becomes visible in three behavioural paradoxes that a single method would have concealed: a ‘mobile stability’ in which employees simultaneously prize security and remain open to external opportunities; a mismatch between the formal recognition systems favoured by managers and the interpersonal recognition employees expect; and an autonomy paradox in which managerial claims to empower are not perceived as such by employees. Beyond these findings, the article offers a documented and replicable protocol, with explicit quality benchmarks, responding to calls for transparent mixed-methods implementation from an emerging-market context that remains under-represented in the methodological literature (Halme *et al.*, 2024).

Remaining on methodological terrain, Faraci and Ferlito (this issue) turn to the rapidly changing relationship between artificial intelligence and case-based inquiry. Drawing on a review of 139 documents and reading them through affordance theory, theorizing from cases, and sociomaterial perspectives, the authors argue that AI involvement should not be treated as a uniform methodological condition. They develop a four-role framework in which AI acts as Discoverer, Selector, Co-Constructor, or Generator of cases,

and show that each role carries distinct implications for contextual understanding, methodological rigour, researcher oversight, and the epistemic status of empirical material. Three propositions link these roles to different modes of theorizing and to the preservation of qualitative rigour. The contribution highlights both the opportunities and risks associated with AI-supported case research: it equips scholars to harness generative and agentic systems deliberately, while guarding against the erosion of the interpretive judgment on which the legitimacy of case research ultimately depends (Nguyen & Welch, 2026).

Turning from method to substantive governance concerns, Notari *et al.* (this issue) examine how a regulated organization reconciles the competing imperatives of compliance and service quality. Through a theory-elaborating, embedded single-case study of Australian Harbour International College, a registered training provider in Sydney, and drawing on a longitudinal documentary record analysed with the Gioia methodology, the authors identify five interlocking pillars – curriculum design, multi-source feedback, trainer development, digital infrastructure, and stakeholder engagement – through which compliance and quality are co-produced over time. Their central move is conceptual: they reframe the familiar compliance-quality dichotomy as a ‘productive duality’ rather than a trade-off, showing that the two logics, when structurally and culturally integrated, become mutually reinforcing, consistent with the logic of organizational ambidexterity. In doing so, the study repositions stakeholder feedback as a continuous-improvement governance device and demonstrates how a carefully bounded single case can illuminate context-sensitive organizational mechanisms.

Gritta *et al.* (this issue) extend the governance theme to the interior of professional service firms. On the basis of a theory-driven comparative study of thirty Italian accounting firms undergoing digital transformation, supported by semi-structured interviews, the authors reconceptualize professional training not as an individual investment in human capital but as a mechanism of “cognitive governance”. Their comparison reveals a systematic trade-off: training pathways oriented toward procedural knowledge accelerate short-term productivity yet entrench technological dependence and automation bias, whereas the integration of theoretical and conceptual content cultivates professional judgment and sustains longer-term adaptability. By interpreting training as a driver of the knowledge structures that shape technological adaptation trajectories, the article contributes to the literature on professional service firms and digital transformation, and clarifies how organizations can govern the tension between efficiency and judgment in knowledge-intensive settings.

Sustainability and technological transition come to the fore in the contribution by Ferrara (this issue), which asks how organizations move toward the human-centred, sustainability-oriented paradigm of Industry 5.0. Anchored in the dynamic capabilities perspective and based on a multiple-case study of three Italian waste management firms – eighteen semi-structured interviews and archival sources analysed through the Gioia methodology – the study identifies three aggregate capabilities that underpin the transition: a Waste Ecosystem Scanning Capability, a People-Technology Orchestration Capability, and a Smart Waste Cycle Reconfiguration Capability. Together these constitute an integrated architecture through which firms sense environmental complexity, orchestrate human and technological resources, and reconfigure their strategic, operational, and relational processes. The article thereby extends dynamic capabilities theory into a service context that is central to the circular economy yet has received limited attention within the Industry 5.0 debate.

Covucci (this issue) shifts the analytical lens to entrepreneurial finance and regional development. Through a longitudinal single-case study of Futura S.r.l., a FoodTech venture based in Southern Italy – a territory historically marked by information asymmetries and capital gaps – and relying on the triangulation of documentary and operational sources, the author reconstructs the firm's trajectory from bootstrapping to structured capitalization. The analysis identifies a “hybrid sourcing algorithm” that orchestrates public grants, bank debt, and private equity, and shows that transparency and rigour in ESG metrics operate not as bureaucratic burdens but as strategic levers of institutional legitimacy capable of attracting global resources. In foregrounding resource orchestration and the role of incubators as “capital architects”, the study reframes territorial constraints as a source of defensible competitive advantage and reaffirms the value of case-based research for theory building in sustainable management.

The issue closes with the contribution by Ferrara *et al.* (this issue), which examines destination repositioning in the aftermath of the COVID-19 pandemic. Focusing on the Marche Region (Italy) and drawing on semi-structured interviews with key informants, the authors show how collaborative networks of public and private actors can convert undertourism from a condition of marginality into a strategic opportunity. Their coding of the interview material yields five network types – public-private, intra-sectoral, inter-sectoral, cross-territorial, and industry-community – that together form the strategic and operational architecture of the regional tourism and cultural system. The findings indicate that sustainable competitiveness depends on integrating diffuse territorial assets through multi-level governance, on addressing infrastructural gaps, and on enhancing community wellbeing, and

that successful repositioning requires a shift from traditional competition toward coopetition, supported by new professional roles able to orchestrate development and manage fragmented resources.

Read together, the seven contributions do more than showcase the versatility of qualitative inquiry across domains as varied as organizational behaviour, education, professional services, waste management, entrepreneurial finance, and tourism. Together, they reveal a set of common themes that can be organized along the three registers this Special Issue set out to advance – methodology, theory, and practice – and that together define the exploratory power of the case method.

At the methodological level, the issue demonstrates that qualitative research is a site of active innovation rather than a settled repertoire. Razafimamonjy's insistence on integration over juxtaposition, and Faraci and Ferlito's anatomy of AI's roles in case research, push the frontier of how cases are designed, selected, and constructed (Köhler, Smith, Greckhamer & Lê, 2025); the recurrent, disciplined use of the Gioia methodology across the empirical papers (Notari *et al.*; Ferrara), and the shared concern with triangulation, transparency, and an explicit evidence-to-claim chain, show how rigour and reflexivity are operationalized in practice (Gioia *et al.*, 2013; Hoorani *et al.*, 2019; Kressmann & Mueller-Seeger, 2025; Bouncken, Czakon & Schmitt, 2026). Collectively, these choices answer the field's call to make the conduct and evaluation of qualitative research more accountable without domesticating its interpretive ambition (Pratt, 2025; Wilhelm *et al.*, 2026).

At the theoretical level, each study uses the case not to describe but to build. What unites them is a governance-and-orchestration sensibility: the reframing of compliance and quality as a productive duality (Notari *et al.*); the interpretation of training as cognitive governance (Gritta *et al.*); the articulation of dynamic capabilities for a sustainable industrial transition (Ferrara); the mobilization of institutional legitimacy and hybrid financial architectures (Covucci *et al.*); and the orchestration of territorial assets through multi-level governance and coopetition (Ferrara *et al.*). These studies illustrate the potential of case research to generate mid-range, mechanism-centred theory when scholars remain close to their empirical settings and allow context to inform, rather than merely illustrate, their constructs (Eisenhardt & Graebner, 2007; Cornelissen, 2017). This governance thread resonates with the intellectual identity of Corporate Governance and Research & Development Studies, extending the study of governance beyond formal structures to the cognitive, relational, and inter-organizational mechanisms through which contemporary organizations are steered.

At the level of practice, the contributions translate analytical insight into

situated guidance for managers navigating transitions they cannot fully control: cross-generational tensions and talent retention in emerging markets; the reconciliation of regulatory compliance with learner and employer expectations; the design of training that preserves professional judgment against automation bias; the capabilities required to enact a human-centred Industry 5.0; the financial and legitimacy work that allows sustainable ventures to scale; and the collaborative architectures through which fragile territories reposition themselves. In each case, the usefulness of the guidance is inseparable from the depth of the case that produced it – a reminder that context-sensitivity is not a limitation on relevance but its condition.

Three cross-cutting motifs deserve emphasis. First, digital transformation and the human-technology interface emerge as recurring themes, from AI in the research process to Industry 5.0, digital infrastructures in service delivery, and FoodTech innovation; the issue frames technology as something to be governed and orchestrated rather than simply adopted. Second, sustainability operates as a shared horizon – environmental, social, and financial – that the case method renders concrete rather than aspirational. Third, and most fundamentally, the papers converge on the exploratory power announced in this issue's title: the capacity of qualitative and case-based research to surface the mechanisms, tensions, and paradoxes that measurement alone leaves in shadow, and to convert them into theory and into practice.

If one conclusion follows, it is that the opposition between rigour and richness, so often assumed, is a false one (Christofi *et al.*, 2024). The studies collected here show that methodological rigour can be achieved through, rather than at the expense of, contextual richness, and that practical relevance often depends on sustained attention to context. In reaffirming the exploratory power of the qualitative approach and the case method, this Special Issue invites management scholars to treat complexity not as an obstacle to be controlled away, but as the very object worth explaining.

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