

Towards Excellence in International and Comparative Research in Library and Information Science

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Session:

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## Abstract:

The current state of international and comparative librarianship (ICL) is evaluated in relation to theory, metatheoretical assumptions, and decisions on methodology and methods. To develop theory that is both grounded in data and socially explanatory, ICL investigators need to seek and extend theory from earlier studies in LIS and to borrow and adapt theory from other disciplines. They need to examine their metatheoretical assumptions before proceeding to methodology and methods. Some methodological decisions specific to international comparative research are identified and outlined. In respect of methods most procedures and techniques of social science research can be utilized, provided account is taken of the international and intercultural context. Recommendations are made on improving work in ICL.

# Introduction

Students embarking on a research methods course in library and information science (LIS) are likely to encounter somewhat discouraging comments on the state of LIS research in the opening chapters of their prescribed texts (e.g. Connaway and Powel, 2010). We are not alone. Writing about social science methods in educational curriculum research, Anyon (1982) complained that much of the research in her field was inadequate. She attributed this to what she considered the dominant paradigm in educational research, namely "naive empiricism", a term originally coined by Bernstein (1976). Anyon identified two kinds of naive empiricism. The first kind of naive empiricism consists in collecting and manipulating data that one finds 'out there' without any awareness of the assumptions on which such research activities are based. The second kind of naive empiricism is concerned with reliance

on "theoretical constructs or abstractions that are not embedded in a developed theoretical system" (Anyon, 1982, p.35). Such theory does not constitute adequate explanations of social reality.

It is argued here that much research in international and comparative librarianship (ICL) is also characterized by naive empiricism. Often, data is being collected and patterns are observed without being framed theoretically (cf. McKechnie and Pettigrew, 2002), or theories are constructed that are essentially circular in that they refer only to their own theoretical constructs and do not connect to socially explanatory theory. This is a pity, because our profession has much to learn from ICL. I therefore welcome the holding of this session, which has been conceptualized and organized by three of IFLA's professional units, the Section for Library Theory and Research (LTR), the Section for Education and Training (SET) and the Special Interest Group for LIS Education in Developing Countries, with a view to promoting valid, relevant and authentic research and education in ICL. My introduction is intended to contribute to this aim by raising awareness of decisions and assumptions relating to theory, metatheory, methodology and methods. I use the term 'international and comparative librarianship' (ICL) to refer to international and comparative studies in LIS more broadly. 'Comparative' refers to international or cross-national, cross-cultural and crosssocietal studies in LIS.

## Development of international and comparative librarianship

International and comparative librarianship emerged in the 1950s and developed as identifiable fields in the 1960s and 1970s (Lor, 2010; Lor & Britz, 2010). A considerable literature took shape in the 1970s and early 1980s, in which their importance and value was emphasized and in which methodological guidelines were developed (Simsova and MacKee, 1970 and 1975; Collings, 1971, Danton, 1973 and 1977; Parker, 1974; Harvey, 1977; Keresztesi, 1981). These authors tended to cite one another and comment on one another's work, so that during this period there existed something like a research front, at least in comparative librarianship. The literature on international and comparative librarians as fields of study (as distinct from work *in* these two fields) petered out in the 1980s, with some significant exceptions (e.g. Keresztesi, 1981; Krzys and Litton, 1982; and Bliss, 1993).

Initial inspiration for comparative librarianship had come from more established comparative disciplines such as comparative linguistics, religion, law, politics and education (Danton 1973; Foskett, 1976 and 1977). Of all these fields, comparative education was most often held up as a model for comparative librarianship. Comparative education and other comparative fields have continued to develop the conceptual and methodological basis for comparative research (e.g. Hantrais, 2009; Landman, 2008; Pennings *et al.*, 2006), and to sustain lively conceptual and methodological debates (e.g. Cowen, 2006; Crossley, 2002; Schriewer 2006). However, this has not happened in ICL, where there has been little or no methodological discussion since the early 1980s.

## Current state of international librarianship

This is not to say that nothing is being published in ICL. A great deal is published in international librarianship, and its literature can be roughly divided into two parts. The first part comprises geographically delimited studies: articles, book chapters and some monographs on aspects of librarianship in countries other than that of the author, as well as area studies and regional and international surveys. Here 'international' is often used in the American sense of "foreign". There is a wide range of regional and international surveys, many of them dealing with developing countries. In most of these studies the comparative element is missing or very rudimentary. While many of such studies are informative, they do not constitute a coherent literature.

The second part of international librarianship is thematic, dealing with various themes in the LIS relations between countries, societies and cultures, including relations of influence and the dissemination of ideas in LIS; LIS development issues and aid; international LIS education; ICT infrastructure and the digital divide; the political economics of resource allocation and information flows among the countries of the north and the south; and the role of international organizations. This is by no means a comprehensive list. While there is some theoretical reflection and cross-fertilization, no theory of international librarianship (or of the themes mentioned here) has emerged and the literature is only weakly linked through citations. Limited use is made of theoretical insights from other social science disciplines, such as the various theories on the diffusion of innovations, cultural change, policy borrowing, development and post-coloniality. Neither are there many cases where authors explicitly construct a theory to frame and design their study and to interpret their findings (cf. McKechnie and Pettigrew, 2002). (For interesting exceptions, see *inter alia* Aarek *et al.*, 1992 and Yu, 2008.)

## Current state of comparative librarianship

Turning now to comparative librarianship, a good deal of comparison is being undertaken, but a survey of recent research (Lor and Huang, in prep.) suggests that this literature presents several problems. First, it is scattered and difficult to find in the bibliographic databases. Second, inspection of comparative librarianship articles that can be found shows that there is no discernable nucleus. Authors are not citing one another or any other comparative studies in LIS. Third, hardly any methodological literature is cited, let alone literature relating to comparative methodology. There is little evidence of awareness of issues of metatheory, methodology or methods. Finally, this literature is largely atheoretical – studies are mostly conducted in a theoretical vacuum. Neither theory from LIS nor theory from other subject fields is used to develop conceptual frameworks, hypotheses or research designs, or to interpret results. For some interesting exceptions see *inter alia* Maack, 1985; Knuth, 1999; Dalbello, 2008 and 2009; and Streatfield and Markless, 2011. However, many other comparative studies are textbook examples of naive empiricism.

## The need for theory

In the article cited earlier, Anyon (1982, p. 35) describes theory "as an attempt to distinguish appearance or observable characteristics from essence; to get behind empirical data". Theory should be grounded in data and there should be a reciprocal relationship between theory and

data: the one should inform the other. Further, for Anyon, theory has to be "socially explanatory".

I understand this to imply that we need to find a middle ground between two extremes. At the one extreme we have rudimentary models which merely attempt to explain empirical findings in terms of statements relating to the data. As Hjørland (2000) has pointed out, models may be helpful but do not induce us to question the assumptions on which they are built. In LIS we may find sets of trivial hypotheses being tested using sophisticated inferential statistics, while the "so what?" question is not answered. The other extreme is that wide-ranging 'grand theory' that can explain a broad range of social phenomena, for example Marxism and rational choice theory (Hamilton 2004, n.p.). Although they may be plausible and widely accepted, such theories are too abstract and too far removed from what can be empirically observed, to be of immediate use in designing a research study. Instead, they provide spaces for reflection and theorizing. Although some use is made of theory from other fields such as psychology, sociology or management, LIS has produced very little theory of any significance (cf. Hjørland, 1998, on information science). In my view this applies a fortiori to ICL.

In comparative LIS we see little evidence of theory development. Where theory exists, we do not see it being taken up and developed by later investigators. For example, in studies of LIS development in former British and French colonies a great deal of useful material has been generated and some embryonic theory has emerged relating library development to the differences between the British and French/Portuguese colonial strategies of 'divide and rule' and 'assimilation' respectively. However, these notions have not been systematically explored and a theoretical framework has not yet been developed for such a study. Studies conducted in international librarianship provide raw material for such analysis, but in comparative librarianship each investigator seems to start from scratch, so that theory is neither built nor tested which could be used – first in an attempt to explain what has so far been reported in the literature and secondly, to select additional cases for study.

## Metatheory, methodology and methods

Assumptions of which the researcher may be unaware underpin decisions in international and comparative LIS research. Much of this also applies to decisions in LIS education and professional practice, for example in international education and in areas such as LIS development aid and policy borrowing. Problems in international work typically arise when researchers, educators, or practitioners are not aware of the assumptions which underlie their decisions. When assumptions are not brought to the surface, decisions are made by default. These assumptions can be of different kinds; hence it is useful to distinguish between metatheory, methodology and methods.

## Dervin (2003, p.136) defined metatheory as

...presuppositions which provide general perspectives or ways of looking, based on assumptions about the nature of reality and human beings (ontology), the nature of knowing (epistemology), the purposes of theory and research (teleology); values and ethics (axiology); and the nature of power (ideology).

Guba and Lincoln (1994, p.105) used the term "paradigm" for essentially the same thing, defining a paradigm as "a basic belief system or worldview that guides the investigator, not only in choices of methods but in ontologically and epistemologically fundamental ways". Such paradigms include positivism, postpositivism, interpretivism, constructivism, critical theory, and participatory and emancipatory paradigms (Cresswell, 2009; Mertens, 1998; Guba and Lincoln, 1994 and 2005). It is emphasized that consideration of paradigms should precede considerations of methodology and methods.

Following Dervin (2003) I see *methodology*, as a bridge between metatheory, as defined above, and *methods*, the specific practical procedures that are judiciously selected to collect, analyze and interpret data. In contrast with methods, methodology is concerned with high-level decisions on research approaches, strategy and research design. The hierarchy of metatheory, methodology and methods can be compared to an iceberg (FIGURE I).

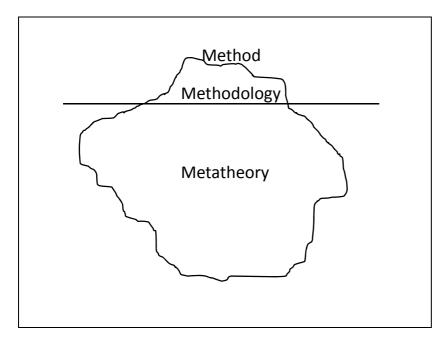


FIGURE I: The Iceberg Metaphor: Research Assumptions and Decisions

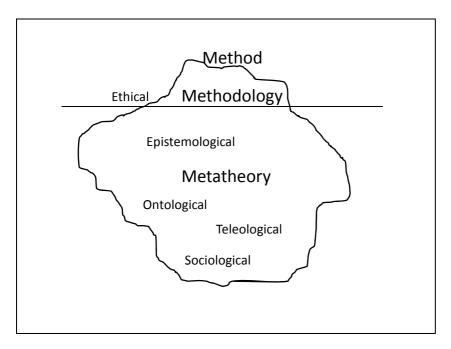
Due to the difference in density of ice and sea water, only about one tenth of the volume of a floating iceberg is above the surface of the sea. Thus the iceberg serves as a metaphor for the dimensions of research which are the subject of conscious decisions (those visible above the surface) and the dimensions that underlie what are often implicit or unconscious assumptions (those below the surface). Metatheory can be visualized as constituting the submerged bulk of the iceberg. Methodology should be above the surface, although inspection of the literature shows that in comparative librarianship not all methodological decisions are the subject of conscious reflection – or if they are, they are not explicitly reported. We find methods, as the most visible dimension, at the tip of the iceberg. If any explicit rationale is provided, researchers generally give an account of the specific procedures and techniques they used. In comparative studies procedures and techniques which form part of the general 'toolkit' of LIS research can be applied, but they should be selected in light of methodological decisions, including decisions on the strategy of comparison, and they may need to be adapted .

In the following sections I outline some aspects of metatheoretical assumptions and of decisions on methodology and methods in international and especially comparative LIS research.

# Metatheoretical assumptions

The various metatheories or paradigms mentioned above can be described in terms of a number of dimensions, as for example in the comparative tables in Pickard (2007) and Guba and Lincoln (1994 and 2005). Following and adapting Mouton & Marais (1990), who distinguished five "dimensions of social science research", I have found it useful to distinguish five metatheoretical dimensions: sociological, teleological, ontological, epistemological and ethical. By specifying these within the submerged space of the iceberg labelled 'metatheory', I arrive at the "Iceberg Model" pictured in FIGURE II.

FIGURE II: The Iceberg Model of Research Assumptions and Decisions in International and Comparative Librarianship



As Mouton and Marais (1990) point out, the dimensions of social science research are part of the same process and represent emphases or perspectives on the research process. Scholarly theories, models and philosophies cut across them. Elsewhere (Lor in prep.) a more detailed account is given of the five dimensions of metatheory. Here I illustrate the dimensions by means of some selected questions relating to each:

The *sociological dimension* considers the researchers within their social, cultural, linguistic and national contexts. The following questions illustrate some relevant considerations:

- Do the authors explicitly deal with the challenges of inter-cultural understanding, cultural bias and cultural relativism?
- If comparative, was the study, with its instruments and techniques, designed in both/all of the countries being compared (symmetrical), or in one of the countries (asymmetrical)?

The *teleological dimension* is concerned with purpose or aim of the research. The following questions illustrate some relevant considerations:

- What is the overarching purpose of the research: basic and theoretical, or is it aimed at practical application?
- If practical, is it aimed at applying findings to evaluate, change or improve institutions, systems, processes or products through comparative rankings, benchmarking, adaptation, innovation, etc.?

The *ontological dimension* is concerned with the nature of what is investigated. (In the original, philosophical sense, which is not to be confused with the more modern use of the word in the context of knowledge organization, ontology is the study of being or reality.) The following questions illustrate some relevant considerations:

- Is the phenomenon under investigation something that exists 'out there' in external reality and can be observed (realism)?
- Is the phenomenon studied in context? Is there an explicit or implicit systems approach or is there an underlying ecological or evolutionary metaphor?
- Are nation states assumed as necessary units of analysis ('methodological nationalism')?

The epistemological dimension is concerned with how we can come to a valid or good understanding of social reality, where 'validity' can be interpreted in various ways depending on the metatheoretical stance one takes. The following questions illustrate some relevant considerations:

- How does the author see him/herself in relation to the phenomenon that was studied: completely detached and independent from it (positivism), imperfectly detached from it but striving for objectivity (postpositivism), or in a continuous interaction with it (interpretivism)?
- How critical is objectivity and how acceptable is a subjective element?
- What role do values play in the research: are they rigorously excluded, or included as a formative element?

The *ethical dimension* is concerned with the various ethical issues that need to be taken into account in international and cross-cultural research. This dimension is pictured above the water line in the Iceberg Model, since today there is general awareness of ethical issues in social sciences research. The following questions illustrate some relevant considerations:

• Do the authors demonstrate an awareness of potential national and cultural differences in the understanding of concepts such as beneficence, privacy, confidentiality, informed consent, the right to withdraw from the study, and the re-use of data?

• In cases where research was conducted in developing countries, did the authors demonstrate care for the autonomy and dignity of *research participants* and of *members of the research team* who may have been disadvantaged in terms of language, literacy, poverty, etc.?

To the above we can add some general evaluative questions:

- Do the authors explicitly identify the paradigm within which they work, e.g. cognitive, constructivist, Marxist, feminist, post-colonial, etc.?
- If not, do the authors give any evidence of awareness of metatheoretical issues? (If there is no such evidence, their stance is likely to be naïve empiricism.)

# Methodology

As indicated above, I use 'methodology' in the broad sense of a bridge between metatheory and methods. Ragin (1987, p. 165) put it this way:

...social science methodology does not concern mere technique; it concerns the relationship between thinking and researching. The key concern here is the impact of the organization of the investigation and the structure of the data analysis on how the investigator thinks about the subject.

While there has been little recent reflection on the methodological aspects of comparative librarianship, there has been ongoing rethinking and discussion in other comparative social science fields, such as in comparative education (e.g. Kelly *et al.*, 1982; Raivola, 1986; Crossley, 2002; Cowen, 2007), comparative law (e.g. Twining, 2004); and comparative politics (e.g. Ragin, 1987; Pennings *et al.*, 1999; Landman, 2008), among many others.

It has been said that the only true methodological decision is that between quantitative and qualitative approaches (Pickard, 2007). In the case of comparative studies, however, strategic decisions concerning the number of cases and variable-oriented versus case-oriented studies (Ragin, 1987) and the historical or chronological dimension (Sweeting 2005; Pennings et al., 1999) should be considered within the realm of methodology rather than method. In this paper, roughly following the levels distinguished by Pickard (2007), I distinguish three levels of methodological decisions in comparative studies:

- General methodology: the choice between quantitative and qualitative and mixed methods methodology
- Comparative strategy
- Comparative research design

These are outlined below. Although the focus is on comparative LIS research, much of the discussion is also relevant to international LIS.

## Quantitative, qualitative or mixed methods approaches

Metatheoretical assumptions have a strong influence on the methodological choice between quantitative, qualitative and mixed method approaches. Quantitative methodology is usually

associated with a positivist and post-positivist metatheoretical stance, and qualitative methodology with an interpretivist or allied metatheoretical stance (cf. Hantrais, 2009). There is a huge literature discussing the pros and cons of quantitative versus qualitative approaches (e.g. Mouton and Marais, 1990; Cresswell, 2009; and Hantrais 2009). It is hardly necessary to add to this discussion. The use of multiple methods or *mixed methods*, including both quantitative and qualitative methods, has grown in popularity. But while the quantitative and qualitative methods are complementary and while there are advantages to combining them, there is a risk that the results will be irreconcilable since the underlying worldviews are incommensurable (Guba and Lincoln, 2005). The choice of quantitative, qualitative or mixed methods approaches is not a matter of convenience. The ICL researcher must be clear about the metatheoretical assumptions underlying this decision.

#### Comparative strategy

One of the most prominent issues discussed in comparative methodology texts in the social sciences is the question of how many cases (where cases refer mostly to countries) should be studied. However, it can be argued that this decision depends on a choice between what Ragin (1987) has called variable-oriented and case-oriented studies, in which quantitative and qualitative methods respectively are applied in comparative studies. Typically, in *variable-oriented studies* many countries are studied. The focus is on a limited number of variables, which are abstracted and removed from the concrete reality and context of the countries that are studied by means of simplifying assumptions, eliminating complexity instead of deciphering it (Ragin, 1987). In *case-oriented studies* a single country or a small number of countries is studied. The focus is on the individual country in its historical specificity and its full context. Each case is considered as a whole, taking into account the total configuration or constellation of factors and conditions. Ragin (1987) emphasizes the need to unravel the "multiple conjunctural causation" that characterizes social phenomena.

#### Comparative research design

The mainly qualitative case-oriented strategy and the mainly quantitative variable-oriented strategy are manifested in the three main comparative research designs: single-country studies, many-country comparisons, and few-country comparisons.

There has long been controversy about whether *single-country studies* (case studies proper) should be considered to be comparative studies (e.g. Sartori, 1991, Landman, 2008). This is also reflected in the literature of comparative librarianship (e.g. Danton, 1973; Krzys and Litton, 1983; Collings, 1971 and Simsova and Mackee, 1975). A key decision in single-country studies concerns the selection of countries. Often countries may be selected simply because the researcher is familiar with them or has access to them. There should be more cogent reasons, for example, because they have not yet been studied, or because they are seen as being important in relation to other cases or studies. Thus countries may be chosen because they are considered to be representative of a category or group of countries, exceptional, or counterfactual (Landman, 2008).

*Many-country comparisons* (also referred to as survey studies, cross-sectional studies, crosscase research or large-N studies) usually employ a quantitative methodology typically involving multivariate analysis. Ontological assumptions underlying many-country comparisons are that countries can be seen as units, that the features being compared can be measured, that these features are sufficiently similar, and that variations in features in one country are largely independent of variations of the same features in other countries ('unit independence') (Landman, 2008). Vast differences between countries call into question the assumption that their features are comparable. Nevertheless, many-country comparisons lend themselves to the formal testing of hypotheses. When hypotheses are to be tested, a relationship holds between the number of variables and the number of cases. Since the total number of countries that qualify for any given study is relatively small, comparativists do not commonly select countries by means of sampling. Instead, they often include all the countries that satisfy given criteria or belong to defined types and for which data are available.

In terms of the number of cases being compared, *few-country comparisons* are found on the continuum between single-country studies and many-country comparisons. The countries can be as few as two. A critical question in few-country comparisons, as it is in single-country studies, is which countries to select. In few-country studies the countries are not selected by sampling. Instead they are carefully selected for the purpose of the study (Ragin, 1987). Principles applied to the selection of countries for single-country studies are relevant here as well, but additional factors come into play when we consider few-country comparisons, especially if it is intended to uncover causal relationships or conditions associated with particular developmental pathways. Space limitations preclude a discussion of basic design strategies for selecting countries for comparison, such as the 'Most Similar Systems Design' (MDSD) which corresponds to Mill's 'Method of Agreement' (Pennings *et al.*, 1999; Landman, 2008; Hantrais, 2009). The point is that the choice of countries to be compared is not a trivial decision.

In comparative studies in LIS authors rarely give an account of why they chose the countries they compared, other than in very general terms (e.g. selecting a developed and a developing country, or countries from Western and Eastern Europe). It seems the choice is mostly made in light of personal or contingent factors. The theoretical interest of many such studies is limited. A more significant contribution to theory can be made if the countries to be compared are selected in light of theoretical considerations.

## Methods

Here I consider methods as such (considerations of procedures, techniques and instruments), as distinct from methodology. In ICL studies the full range of procedures and techniques which form part of the general 'toolkit' of LIS research (data collection, sampling, data processing etc.) can be applied, but they should be selected in light of methodological decisions, including decisions on the strategy of comparison. In addition, we need to pay attention to specific issues of comparative methods, where some adaptation to general procedures or techniques may be needed, or pitfalls need to be pointed out. By way of examples, two of these are touched on briefly.

*Can concepts travel?* Probably one of the most problematic issues concerns concepts and the use of languages in studies involving a foreign language, multiple languages, or even national variants of an internationally used language such as English. International comparative studies imply the use of concepts that can 'travel' – concepts that can be used across national, cultural and linguistic boundaries. We cannot assume that the same word has the same

meaning when used in different national and cultural contexts. Even less can we assume that words looked up in bilingual dictionaries have equivalent meanings for the purpose of our study.

*Concept intension and extension*: The way in which concepts are formulated can have important implications for the internal and external validity of a comparative study. As Sartori's (1991) "ladder of abstraction" indicates, there is an inverse relationship between the intension and extension of a concept. Thus extending or 'stretching' the concept of 'public library' to include village reading rooms and telecenters allows us to cover more countries, but the agencies studied may have little in common. Therefore the decision on how to define key concepts is a very significant decision in comparative method.

There are other issues of procedures and techniques to which attention should be paid in international and comparative studies, especially those relating to the equivalence of sampling, questioning and coding in more than one country. A pertinent question is whether the investigators provide sufficient information about these aspects of their methods.

## **Conclusion and recommendations**

There is considerable scope for improvement in two areas of ICL: the use and development of theory, and general metatheoretical and methodological awareness. Referring to ICL generally, it is a matter of concern that much of its recent literature appears to be atheoretical in that it does not purposefully build on earlier international or comparative studies, and does not adequately utilize LIS theory or theory from other disciplines. Looking more specifically at comparative librarianship, an examination of recent literature in comparative education, politics, social policy and other comparative disciplines indicates that comparative research in our field has not kept up with conceptual and methodological advances in comparative studies in these other social sciences disciplines.

Research in international librarianship is not necessarily comparative. As the number of foreign students in LIS schools increases, we can expect an increase in research with an international dimension, even if it is not comparative. Students in LIS programs (whether foreign or local) need a sophisticated understanding of international issues in our field. Such understanding and awareness are also essential to decision-making in the planning and development of educational programs undertaken in partnership with other LIS schools, in development assistance and international consultancies.

In this session we are concerned with excellence in ICL: how to make progress toward valid, relevant and authentic research and education. Thus I conclude with some recommendations:

(1) Theory: investigators in ICL, especially masters and PhD students, should be encouraged to contribute to the development of theory in our field by seeking out and evaluating theoretical insights from earlier work in LIS as well as theory from other fields. They should be encouraged to adapt and utilize such theory in developing their conceptual frameworks, designing their studies and interpreting their results. For example, I think we will start making progress once thesis and dissertation committees start asking students for credible rationales for the selection of the country or countries they intend to study.

(2) Meta-analysis: In certain areas enough material has accumulated in the form of country studies, regional surveys, international statistical databases and other sources to make possible meta-analyses in which this material is reviewed and interpreted from a theoretical perspective, where theory from LIS is evaluated, and theory is borrowed and adapted from other fields, possibly allowing us to approach the construction of what Merton (1968) has called theories of the middle range.

(3) The research process: in research method courses we need to raise awareness of the assumptions that underlie research decisions, and of the sequence in which research decisions should be taken. LIS researchers need to examine their metatheoretical assumptions (for example unstated teleological, ontological and epistemological assumptions) before proceeding to methodology and methods. Thus decisions on metatheory should precede decisions on methodology, and decisions on methods should flow from these. (This does not imply that the order has to be strictly linear. Some recursion is likely.) This has always been difficult to convey to students and is even more difficult today now that we have such affordable and inviting tools at hand to conduct web-based surveys at minimal cost.

(4) Metatheory: Courses in LIS research method should include some introductory material on metatheory. This is not likely to be a popular unit in LIS research methods courses, but it is necessary to ensure that our students do not become positivists by default. If they must be positivists, let it be consciously.

(5) Comparative methodology: In preparing to do a comparative study, the investigators should invest some time in familiarizing themselves with comparative methodology. PhD students proposing an international, cross-national or cross-cultural study should be strongly encouraged to take credits in comparative methodology. If LIS schools do not themselves teach this (and in fact also if they do), they should encourage these students to take some credits in another comparative field.

(6) Methods: We need greater awareness of the complexities and pitfalls of multilingual and multicultural research contexts.

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