Conceptual paper

An overview of qualitative comparative analysis: A bibliometric analysis

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ABSTRACT

This study is organized in two parts. We conduct a general analysis of the use of qualitative comparative analysis (QCA), and a bibliometric study of the use of QCA to analyze the specificities of the research publications that apply this methodology. Our results show the differences in quantitative terms of the three variants of this methodology: fsQCA, csQCA, and mvQCA.

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RESUMEN

Una visión general del análisis comparativo y cualitativo: Un análisis bibliométrico

El estudio está organizado en dos partes: La primera parte consiste en un análisis general del uso del Análisis Cualitativo Comparado (QCA); en la segunda parte se presenta un...
Introduction

Social science is aimed at helping us understand the reality surrounding us so that we can improve it. Different fields of study have adopted a systems approach (Kast & Rosenzweig, 1972), which has become one of the predominant paradigms. A basic principle of Systems Theory is equipollency which generates the need to identify the various configurations of the system elements which lead to a desired state or outcome, while allowing understanding of the critical factors or necessary conditions explaining the presence or absence of that outcome or state.

However, social science, in an attempt to emulate its seniors, the pure sciences, has adopted increasingly sophisticated and powerful methodologies and algorithms. These are geared toward establishing and quantifying causal relationships between the variables, and underestimate the importance of analyzing the complex interactions produced in social science which allow for several alternatives to achieve the same end.

In recent years, the adoption of qualitative comparative analysis (QCA), which uses Boolean logic, has been growing, substituting traditional correlation methods to establish causal conditions related to a particular result (Ragin & Fiss, 2008; Ragin, 1987; Ragin, 2000; Ragin, 2008; Vis, 2012; Woodside, 2016). Aside from its application to case studies, QCA currently focuses on analysis of empirical data to generalize the analysis, taking account of possible replication in subsequent studies, and constructing logical propositions following the qualitative study of the phenomenon in question (Ragin, 1987; Ragin, 2000; Woodside & Zhang, 2012). This method is effectively and parsimoniously able to address the challenges described in the previous paragraph, and offers results which complement and enrich the state of the art.

This article provides a detailed description of the characteristics of published research that employs QCA. Specifically, the study aims to identify quantitative differences among its variants, to provide a global perspective of the state, scope, and impact of published research. The objective is to spread within the academic community, an analytical method that is able to complement and extend research programs. To achieve this, we provide a bibliometric analysis of the research contributions to date.

Based on this analysis, the present article provides information on the following aspects: (1) the number of studies per research field; (2) the number of articles published per year; (3) the number of articles that use each variant of QCA and the number of articles of each QCA variant published in JCR journals; (4) citations per field and average number of citations; most cited QCA articles; (5) the journals publishing the highest number of articles using QCA. Accompanying a description of the data, we explain the circumstances which possibly led to this evolution.

The study is structured as follows: ‘Qualitative Comparative Analysis’ section reviews the evolution of QCA; ‘Bibliometrics’ section provides a bibliometric analysis of the use, application, main authors, and impact of QCA; ‘Conclusions’ section discusses the main conclusions and suggests future directions of research on QCA.

Qualitative comparative analysis

QCA (Ragin, 1987; Ragin, 2000) is an analytic technique which combines quantitative and qualitative methodologies. The technique originally focused on small samples but further development has allowed its application to broader contexts.

QCA was developed from Mill’s (1843) canons, to establish causal relationships through systematic comparisons. Particularly relevant are the methods of agreement and difference. According to the method of agreement, if two or more examples of the phenomenon under investigation have just one circumstance in common, the circumstance common to these examples is the cause or effect of the given phenomenon (Mill, 1843). According to the method of difference, if there is a circumstance when the phenomenon under investigation occurs, and another when it does not occur, this difference is the cause or effect or a necessary part of the phenomenon. Mill (1843) combined these methods in what came to be known as the “method of agreement and difference”. This method, although less consistent than previous methods, advanced application of these theories to real circumstances, and laid the foundation for the development of QCA (Vassinen, 2012).

Some of the disadvantages of Mill’s (1843) principles are: (1) The complexity involved in identifying a common difference or circumstance, and (2) that this difference should be the determining cause of the phenomenon. In other words, Mill’s canons do not allow for multicausality of the phenomenon. Furthermore, the method of the agreement is applicable only to phenomena with positive results.

Applications of QCA were initially focused on case studies. The drawback to these methods is the impossibility of generalizing the results to other similar cases. However, currently, in addition to being based on case studies QCA focuses on analysis of empirical data for the generalization of analyses taking into account possible replication in subsequent studies, and constructing logical propositions as a result of

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