

QUALITATIVE ECONOMICS AND THE OPPORTUNITY TO PUSH FOR HETERODOXY IN THE CLASSROOM

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Pluralism as methodological integration

As an influential *heterodox* economist assertively points out “[there] is no such thing as one theory that can explain everything better than others” (Chang, 2014, p. 69). During a recent academic lecture in Colombia, this same scholar had the opportunity to expand on his view on the importance of *pluralism* in social research. He first suggested that the use of theories should respond to the problem at stake, given the thematic focus of the intellectual traditions that gave them birth. For instance, he argued that the neoclassical school of economics makes a *good job* when exploring some individual decisions in simple markets but might result as not truly relevant to inform studies on industrial innovation. He also pointed out that alternative theoretical constructs respond to different world views -or ontologies-, advising hence young scholars, engaging with exploratory fieldwork to define the usage of theories based on efforts to grasp empirical events of the real world.

While the urge for pluralism in the training of future economists counts with ample recognition today (Bowles & Carlin, 2020), the debate on how to address that demand lacks no controversy. For instance, some authors warn how attempts to make the curriculum more comprehensive (e.g. studying multiple theories) might result in confusing students (Mearman, Wakeley, Shoib, & Webber, 2011; Obeng-Odoom, 2019). For Bowles & Carlin

(2020), to address those challenges in undertaking a variant of *pluralism by juxtaposition*¹, they suggest endorsing *pluralism by integration*, by bringing “insights of differing schools of thought and knowledge from other disciplines into a coherent paradigm” (p. 208). Considering the following excerpt from Stilwell’s (2019) work serves, however, to also problematize the optimism entailed in that view:

... heterodoxy and pluralism are not synonymous. (...) If accepted, the pluralist position ensures that heterodox views must get a good hearing alongside orthodox views. Importantly though, it also requires heterodox economists to not simply “push their own barrow,” whether Marxian, Sraffian, Georgist, or whatever. In other words, critics of orthodoxy should not fall into the monist trap by espousing only their own preferred alternative to the orthodoxy (pp. 40-41)

With this acknowledgment of the risks of building new *single-answer* orthodoxies in economic analysis², my interest in writing this text is not invalidating pluralism by

¹ For them, “[a]lthough at its best, this approach presents rich opportunities for students to learn to contrast and criticize ideas from differing points of view (...) [it]can also reduce the study of economics to a kind of paradigm tournament, conveying little or no common analytical core concepts” (p. 208).

² Let us consider the following example used by Bowles & Carlin (2020) to explain how the *pluralism by integration* variant inspired a new textbook of introductory economics that they, and some of their colleagues, have designed. Here I have intentionally left some words in italics to argue how the new narrative, while confronting mainstream orthodoxies, reflects (at least) some deterministic thinking, as Stilwell (2019) warns us about: “[our] treatment of the firm and the labor market starts with *the fact* that employer and employee have conflicting interests about effort exerted at work. The idea that the labor contract *cannot* ensure that the employee works hard and well is a common illustration of the modern microeconomics of incomplete contracts.

integration, nor neglecting its merits. I rather elaborate upon the growing interest of economists in qualitative methods (Starr, 2014) to suggest the potential of integration at a methodological level -in contrast to a theoretical one as exemplified by Bowles & Carlin's (2020) take-, to provide clearer foundations for young researchers on how to navigate across economic theories. Such a general worldview concurs with research practices also represented in the work of professional economists, as the following excerpt from a publication in an influential journal in development studies illustrates.

The quantitative analysis of survey data has the advantage of making generalizable statements about large populations, but it is disadvantaged by an unwieldy apparatus that tends to limit what it reveals to hypotheses that circulate within academic or policy circles (...) Informed by potentially dated secondary literatures, these [analyses] run the risk of overlooking the current reality of the subjects under study (...) Our paper goes a step further by (...) integrating participatory appraisals, focus group discussions, in-depth interviews, and participant observation with quantitative data from representative surveys. The survey instruments emerge from the qualitative investigation, drawing on insights from the field to define the topics of interest and identify the appropriate methods of measurement (Jha, Rao, & Woolcock, 2007, p. 231).

But its provenance is Karl Marx, not Walras or Marshall. The reason why the contract is incomplete is that *information is both local and scarce*, the cornerstone of the economics of Friedrich Hayek, although subsequently developed in very different ways by contributions to principal-agent modeling over the past three decades. The employer *cannot possibly* have the information needed to enforce the many dimensions of work effort by court order' (pp. 208-209).

I argue that this last proposal to make use of qualitative tools to inform quantitative forms of inquiry potentially dialogues more clearly, than some alternatives expounded above, with Chang's advice for young scholars. My central argument here, as I shall expand in the next sections, is that the nature of the qualitative inquiry, which is necessarily less structured than quantitative research³, is vital to exploring the complexity of society. Without analytic instruments and methods to grasp features of the *unknown*, measuring and quantifying *stuff* might become a futile intellectual enterprise. That is how I understand Jha, Rao, & Woolcock's (2007) warning on how limiting the generation of new knowledge by relying exclusively on the quantitative study of fixed *hypotheses that circulate within academic or policy circles*. Hence, the importance of the training of future economists in qualitative research to making reaching the goal of pluralism (e.g. suggesting new and *better* explanations) plausible.

Based on this general overview of the subject matter, the following sections of the article elaborate on the design of a course outline to provide such training for graduate students of economics (at a masters level) using strategies that are relatively proximate to economics, as a discipline. This last argument has a clear pedagogical foundation on a Vygotskyian education philosophy: "it is necessary that students are not exposed to concepts too far outside their *zone of proximal development*, [as] (...) trying to understand the contrast between, say, mainstream and radical viewpoints may be too difficult" (Mearman, Wakeley, Shoib, & Webber, 2011, p. 54. *Emphasis in the original*)⁴. The narrative that I present

³ In Maxwell (2013) words, "[q]ualitative research has an inherent openness and flexibility that allows you to modify your design and focus during the research to pursue new discoveries and relationships" (p. 30)

⁴ I have expounded a similar argument elsewhere (Parra, 2018).

emulates the messages I convey students throughout the modules of the course, which include: justifying the topic (why learning qualitative methods?), introducing a methodological framework to situate qualitative research designs and presenting in detail a class project assignment compounded by different activities that aim to nurture different analytical skills. In the last section of the article, I pick up the core methodological foundation of the course and (re)emphasize its intended contribution towards pushing for heterodoxy in the classroom.

Conveying the role of qualitative thinking in economics

Some opening arguments to spark interest in students of economics

At a general level, qualitative thinking opens to scope for creativity and assessing multiple explanations for social phenomena. As Maxwell (2009) puts it, through experiments in qualitative inquiry “encourage creativity and a sense of exploration” (p. 228), which seems intuitively central to the task of understanding why things happen. Not all paradigmatic orientations to qualitative research share this vision, which presumes that real forces, or social mechanisms at work, exist and explain the events with observe. However, economics as a discipline, wherever the orientation one takes, does bulk in the assumption that social determinants exist (Dopfer, 1986), hence the possibility of building causal theories. This initial epistemological argument is important to start devising what type of qualitative analysis skills that economists do require, or at least what kind of arguments will most likely spark their interest in exploring non-quantitative research tools.

Before arriving at specific methodological orientations on the *mechanics* of analyzing the world qualitatively, as a pedagogue I thus argue that it is important to persuade students on the benefits they might gain from these specific skills. Starr’s (2014) paper, published in

the *Journal of Economic Surveys*, provides a summary of common arguments cited by scholars in that field to advocate for mixed methods research, hence representing a valuable pedagogical source for this purpose. In her account, consulting qualitative sources is justified in some of the following situations:

(a) when very little is known about the topic, so that broad exploratory research is needed to identify its basic characteristics; (b) when there has already been a lot of quantitative research on the subject, but key questions remain unresolved; (c) when back-and-forth with an interviewer is thought to be needed to help elicit full and accurate information; (d) when the topic under investigation has some inherent complexities the researcher wants to be able to capture

In this context, I also find useful quoting Gertler et al.'s (2016) influential manual *on impact evaluation*, a topic that has gained momentum in policymaking arenas as representing scientific rigor to inform evidence-based policymaking. Some of their arguments resemble the ones in Starr's (2014), but they somehow feel less abstract as they present them in the context of *practical* discussions on how to use public resources efficiently. For example, as the following excerpt suggests, qualitative knowledge can result central in assisting policymakers in the reflection of what processes and practices are key to replicate or modify throughout the implementation of specific social interventions:

Qualitative data provide context and explanations for the quantitative results (...). In this way, qualitative work can help explain why certain results are observed in the

quantitative analysis and can be used to get inside the “black box” of what happened in the program (Gertler, Martínez, Premand, Rawlings, & Vermeersch, 2016, p. 16)

In my view, these quotes are straightforward in suggesting to students in faculties of economics that the knowledge of some qualitative research skills might improve the usefulness of the toolbox of their discipline. Summing them up, qualitative fieldwork can motivate new research questions, might inform the building of surveys to analyze econometrically and perhaps more importantly (given arguments I present below), can assist in the unraveling of complexities entailed in the causes behind events we observed through variations in metrics and social indicators. At this stage, it is worth noting that, interestingly, either deliberately or not, academic reference published in (most likely) orthodox-economic forums do open the floor for other epistemologies to complement their work. It is in this phase of the study plan where an opportunity emerges to start suggesting specific approaches from qualitative traditions that might fit in this overall narrative.

Introducing qualitative economics

For King (2013), the “questions that economists ask are (...) inherently difficult, and it is unlikely that they have simple answers” (p. 18). He then adds that “economic reality is fluid and subject to continuous change, so that the quest for a single, ‘general’ theory applicable to human behavior in all societies, at all points in time, is a delusion” (p. 18). The notion of change is central to qualitative thinking, given the significance that qualitative researchers place in studying subjectivities of people and how uncertain and contingent social interactions explain how different social processes take place (Maxwell, 2013). From the view of pedagogics, one next challenge consists of framing these ideas to students from

(mainstream) economics, who are usually confronted with economic modeling that departs from the assumption of rational, and hence pre-determined (or fixed), social preferences (Bowles & Carlin, 2020). Woodrow & Fast's (2019) proposal of a tradition they baptize as *qualitative economics* serves this purpose, particularly given their explicit use of language and examples that are common to students from economic theory. Their reference to the theory of the firm in microeconomics illustrates it:

The firm should be understood as the actions and meaning knowledge of the individual actor and of the actors' collective actions over time (...) In this organizing, intersubjective moving pictures of what the firm and the environment are will be created among the actors and create a view of seeing, both on themselves and of the context. The firm and its development come from interpretation and understanding of the situation by those actors who are involved in their organizational actions (Woodrow W & Fast, 2019, p. 212).

While this view of on entrepreneurship entails already a departure from the neoclassical paradigm of profit-maximizing behavior, the intention here is to convey students the message that to understand social processes it is worth asking questions centered on how economic agents interact, in specific contexts, or environments. One core epistemological implication that these same authors present is that people "have to live with and exist with uncertainty and ambiguity" meaning that they are often "exposed to many different interpretations and understandings" (Fast & Woodrow, 2012, p. 167) of the world they inhabit. The study of emotions and perceptions becomes, therefore, central to theorize about economic dynamics, which again, is a common-sense argument for qualitative researchers,

but not that easily endorsed by mainstream economic theorists which tend to be more instrumental and materialistic (Rowlinson, 1997).

The next step in the syllabus of the class consists of exploring specific methodologies to study social behavior in context, a procedure that, as I shall discuss below, will necessarily entail problematizing the endorsement of general theories or explanations. Before doing so I will insist on the assumptions that I am making in each step of the process vis-à-vis the intention of sparking the interest of students of economics in becoming aware of qualitative reasoning. Pedagogically speaking, the key to boosting their motivation is to maintain a language and conceptual frameworks that do not depart abruptly from the traditions in their area of studies (Mearman, Wakeley, Shoib, & Webber, 2011). For non-orthodox economists and researchers in other social sciences, many of the arguments expounded above are obvious and even represent part of the core critique to mainstream economic theory (e.g. that it reproduces an over deterministic and non-relational research methodology). Nonetheless, arguable students of economics would find little motivation in focusing on the critique of their discipline, rather in how it can complement other epistemic approaches to social studies.

An overall methodology to teach qualitative reasoning

A prolific author of qualitative research textbooks and learning materials such as Maxwell (2013) is skeptical of the usefulness of extreme forms of social constructivist and pragmatist reflections on the applications of qualitative reasoning. In my view, scholars such as Pawson and Tilley (1997), and more recently Emmel (2013) and Manzano (2016) argue quite persuasively why difficulties persist, even among experienced researchers, to provide convincing arguments on *technical* discussions of qualitative inquiry like justifying sample sizes, saturation points and, more broadly, validity and rigor. Again, while these are matters

that would have different answers depending on epistemic approaches and traditions, the focus here is on how to deal with specific expectations of students of economics.

In this stage of the class narrative, I find it relevant to build on the methodological conclusion that came out from the discussion of the *qualitative economics* agenda to study human subjective behavior in context to persuade students on the centrality of complex thinking. My aim here is to argue that grasping complexity in social explanations requires transcending simplistic forms of inductive and deductive reasoning in planning research designs and information analysis strategies (Wuisman, 2005). As these are all discussions that entail a risk of falling in excessive use of philosophical jargon that might not always be well received by students of (mainstream) economics (Dow, 2007), I argue on the importance of combining different methods as heuristic tools to serve as translators of certain messages pertaining qualitative reasoning and analysis. Furthermore, in line with the overall message of the last paragraph, I believe that the tools I discuss below have potential in contributing also to more general discussions on the teaching of qualitative methods.

From induction to abduction and retroduction

Saldaña (2009) indicates that popular films and television shows constitute powerful tools for teaching qualitative research skills. That is the case, he suggests, given their potential to provide “metaphor[s] for human experience and [how they simulate] ‘real world’ dilemmas” (p. 249). What I will do next is to quote two dialogue lines, one from one the popular Netflix fiction series, *Stranger Things (ST)*, and a second one from the Hollywood classical movie *Contact (C)*, and then explain how debating some contrasts in their visual representation offers an interesting pedagogical device to convey messages about the logic of qualitative reasoning, at least from the research paradigm I stand from in my class.

Figure 1. Dialogue one

Stranger Things (2016. Season 1, Chapter 6)	
Setting: Jonathan (J) and Nancy (N) have a conversation in Nancy's bedroom. They are worried about their friend Barbara, who, they believe, was kidnapped by a monster from another dimension.	<i>J: Hmm it was bleeding too.</i>
<i>J: My mom said she talked to Will. If he is alive, there is a chance that Barbara is, too</i>	<i>N: One sec. [she looks in a book she is consulting]. Sharks can detect blood in one part per million. That is one drop of blood in a million. And they can smell it from a quarter-mile away.</i>
<i>N: That means that she is trapped... in that place. We have to find it again.</i>	<i>J: So, you are saying it can detect blood?</i>
<i>J: You wanna go to back out there?</i>	<i>N: [Softly] It is just a theory.</i>
<i>N: Maybe we don't have to. When I saw him, he was feeding on that deer. Meaning it's... it's a predator, right?</i>	<i>J: We could test it. But if it works...</i>
<i>J: Right</i>	<i>N: At least we'll know it's coming...</i>
<i>N: And it seems to hunt at night, like a... a lion or a coyote. But it doesn't hunt in packs like them. It's always alone. Like... like a bear. And remember at Steve's when Barb cut herself? And then, last night, the deer.</i>	Post scene: In chapter 8 of that same season, they test their theory. They meet at Jonathan's house and prepare themselves for the arrival of the monster by placing some traps around the place. After deliberately cutting themselves across the palms of their hands, the blood of the wound made the monster appear.

Source: transcribed by the author from the original TV show in Netflix

Figure 2. Dialogue two

Contact (1997)	
Setting: Three scientists in a lab. Dra. Eleanor Arrowway (DE), Fisher (F) and Willie (W) discovered a radio signal that is apparently arriving from a star system called Vega. They try to make sense of the pulsing noise.	<i>F: Seven</i>
<i>W: I got it, I got it, I'm patched in</i>	<i>DE: Seven! Those are primes. two, three, four, seven. Those are all prime numbers. There's no way that's a natural phenomenon.</i>
<i>DE: All right Let me hear it [pulsing noise] Listen to that. Make me a liar, Fish</i>	<i>W: Holy shit.</i>
<i>F: Could be awacs out of Kirkland jamming us, but I'm doubting it</i>	<i>DE: Just calm down and pull up the star file on Vega.</i>
(...)	<i>F: It doesn't make any sense. The system is too young so it can't have a planetary system, let alone life, let alone a technological civilization</i>
<i>W: Ok, point source confirmed! Whatever it is, it ain't local!</i>	<i>DE: Maybe they didn't grow up there. Maybe they're just visiting.</i>
(...)	<i>F: Spacecraft? No, this system is full of debris. It would get clobbered.</i>
<i>DE: All right, it's restarting. Wait a minute. Those are numbers. That was a three. The one before it was a two. Base ten numbers. Just start counting now and see how far we can get.</i>	<i>W: Not if they used their laser blasters and photon torpedoes.</i>
<i>W: That's a five.</i>	<i>F: That's not funny Willie</i>
<i>DE: One.</i>	<i>W: How else are we going to explain it?</i>
	<i>DE: Will is right. If we go public with this, we're wrong. That's it. It's over. We're cooked.</i>

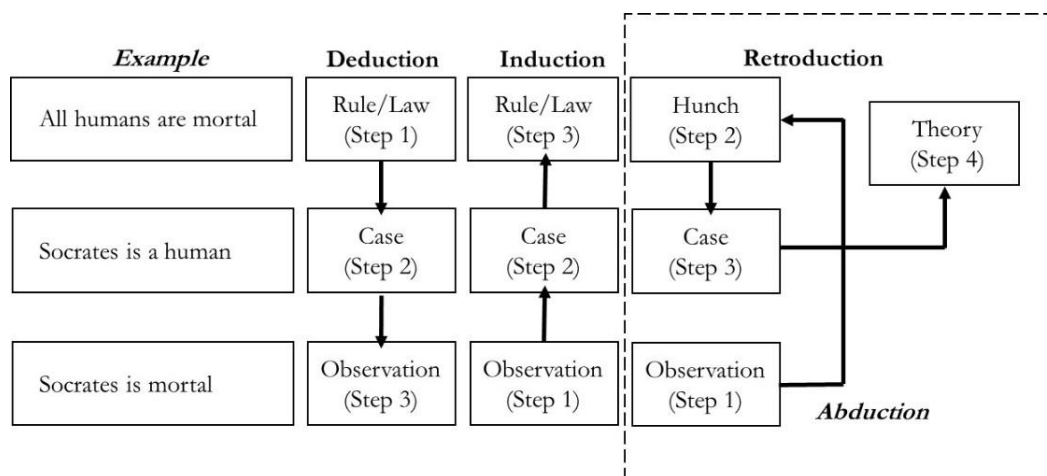
Source: transcribed by the author from the original movie distributed by Warner Bros

According to these video excerpts we just saw, which strategy, and why, seemed more effective in assisting the characters in each situation to solve their query? By placing this question to students, my intention here is to start pointing out, and inviting them to consider, different elements involved in each scene, such as, for instance, the use of previous knowledge to build hypotheses or the specific role of theories in designing research strategies. I highlight how in ST (Figure 1), the path towards solving the mystery of how to find the monster, implicitly involved a creative process of considering alternative explanations, which even drew them to imagine the mystic creature *as if* it were a shark (e.g. a predator attracted by blood). In the case of the excerpt from C (Figure 2), the scientists failed in solving their research question. That happened after several attempts to derive explanations directly from data (and, of course, using some insights from their expert knowledge about astrophysics).

The background of that analysis is a metatheoretical discussion about the usage of different inference logics in research designs. At the beginning of this section, I quoted authors such as Pawson and Tilley (1997) to introduce a critique that researchers from a tradition called critical realism (CR) make to qualitative researchers that endorse either of the two most influential paradigms informing qualitative studies; these are social constructivism and pragmatism. I will not delve into many details of that debate here [see Chapter one Pawson and Tilley (1997) for a fascinating summary], further than introducing, as Figure 3 depicts, the distinction that CR makes between pure forms of induction and deduction, and alternative reasoning paths like abduction and retroduction. Making explicit reference to the video excerpts of ST and C presented to students, as we shall see, helps defining these abstract terminologies and also to emphasize in their usefulness to inform

qualitative analysis techniques where, I insist, students of economist will most likely find (epistemic) comfort.

Figure 3. Different inferential logics



Source: adapted from Wuisman (2005)

As Josh (2020) succinctly puts it, “[w]hereas retroduction is inference to theorize and test hidden mechanisms, abduction is the inventive thinking required to imagine the existence of such mechanisms” (p. 2). In the scene of ST, I argue, Nancy and Jonatan used abduction (or creative thinking) when they reflected, based on some previous observations, on plausible explanations (or hunches) on how to find the monster, and then they tested their theory (a process of retroduction) by building a case with some basic conditions to see if, effectively, the mechanism they expected (the appetite of the monster for blood) was triggered. In the case of C, the inference logic used by the scientific team was arguably more consistent with an inductive reasoning path, as reflected in Figure 3; it departed from an observation which, interpreted in the specific context they found themselves at (the case), motivated their attempts to suggest a possible explanation. One central argument here, which I explicitly

present to students, is that mere induction (a practice commonly referred to as empiricism) fails in providing strong arguments to justify research designs (Emmel, 2013) (which the failure of the scientists conveniently proofs), particularly because of its lack of resemblance in how scientific inquiry works. As Josh explains (2020):

.... empiricism is a paradigm that prioritizes observable reality under the assumption that science must work with objects that scientists can observe and possibly manipulate (...) This is problematic because such underpinning aspects hold the key to understanding complex problems and finding creative, realistic solutions. Empiricism alone does not resolve paradoxes well because such a paradigm does not place value on the idea of ontological depth which is necessary for paradox resolution. Through the scientific realist process, retrodution can reveal and resolve things that appear to be paradoxical through an understanding of the configuration and association among elements in the empirical and actual realms (p. 4).

Always drawing on the specific learnings from the two movie excerpts presented to students, this way of rationalizing processes of data collection and analysis represents hence a platform to lay down a specific research strategy that I find reasonable and appealing to students of economists, given its explicit references to the scientific method⁵. A point that I

⁵ Here I am assuming that there exists a certain belief among (not all, but many, perhaps mainstream) economists that the strength of their discipline, vis-à-vis other social sciences, lies in their explicit endorsement of the scientific method. Starr (2014) suggests that one of the difficulties to inculcate qualitative reasoning among economists is, precisely, the belief that among scholars that “open-ended research cannot be good science, as its conduct seems to depend integrally on judgmental decisions of individual researchers” (p. 256).

will raise in the discussion section of the article is that, however, this whole argumentation should not be read as an exercise to simply adapt standardized qualitative analysis procedures and practices for the usage of economists, but represents an innovation in itself in the design of qualitative analysis courses in higher education. I now proceed in presenting some tasks and activities that I have designed to invite students initiating abductive and retroductive analytical processes in the classroom and further argue how making explicit this rationale in research designs offers unique opportunities to confront some challenging *technical* issues in qualitative analysis debates, such as defining samples and validating findings.

Class activities

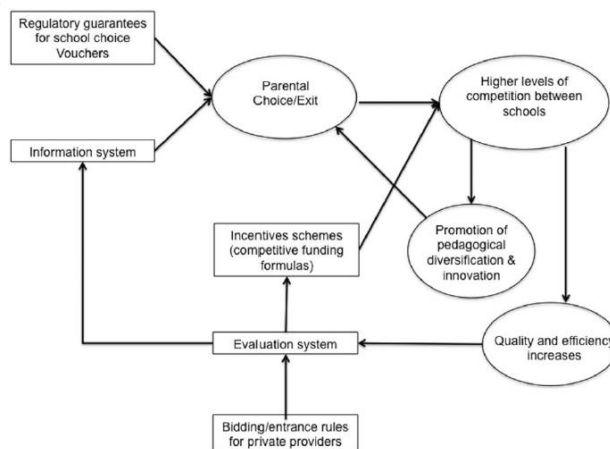
As I interpret it, abduction invites researchers to suggest potential explanations for phenomena they intend to explain, and retroduction is the process of testing and improving (or refining) those explanations with empirical data. These definitions, I sustain, are key to start addressing one of the main goals of this article, which is to invite students to become interested in (eventually) exploring heterodox economics theories. Such an argument, I insist, is consistent with the need for students of economics to become more fluent in qualitative analysis. Vicent and Wapshott's (2014) following quote makes an extraordinary summary of (part) of my argument and hence provides methodological support for a set of class activities, and the logic that connects them, that I explain below:

.... to develop new knowledge about institutional mechanisms, it is particularly useful in the design phase of the research project to reflect on existing theory and knowledge. At this stage an effort can be made to ensure that the research is aimed at something new or under-explored. Where existing fails to explain what is observed here is an

opportunity to abduct and reproduct new forms of understanding. It should be noted, however, that the research process is not typically a linear progression (...) It is usually quite messy and is likely to involve false starts as the researcher oscillates between exploring what we know, on the one hand, and considering that which is ‘out there’ but inadequately explained, on the other hand (p. 155).

The main class project for the course consists of an individual reflection on how qualitative techniques can contribute to the students’ master’s degree dissertation. The guideline for its realization specifies three steps: (i) identifying an economic theory or tradition that is relevant for their study and representing it with a conceptual map (in the context of the specific research question); (ii) building an interview protocol and making an interview to address specific questions that emerge from scrutinizing their map and (iii) analyzing their interview and other relevant material and report their findings. Verger, Bonal and Zancajo’s (2016) analysis of secondary education in Chile is a good reference for what I expect students to achieve through this activity.

Figure 4. Example of a conceptual map



Source: Verger, Bonal and Zancajo (2016)

The aim of this last study, as their authors present it, is “to explain how quasi markets work in the education sector and to assess the extent to which related policies in fact generate new educational opportunities for the poor” (Verger, Bonal, & Zancajo, 2016, p. 224). In their research design, Figure 4 accounts for the result of one first methodological step (abduction) aligned with CR-based thinking, which consists of “systematically articulating the main theoretical assumptions on which the policy to be analyzed is grounded” (p. 225). In developing this argument they maintain that “[t]he theoretical roots of [market-oriented schooling] programs can be found in public choice theory (p. 225)” and that Chile is a relevant case to explore the above-mentioned phenomena because, it had, at least for the time of the investigation, “the longest-lasting, deepest, and broadest experience with highly deregulated educational market mechanisms of any country in the world” (p. 231).

Figure 5. Main assumptions about the mechanisms of schooling markets

<p>About families</p> <ul style="list-style-type: none"> • ... well-informed family choices are the main trigger of school competition. According to market theory in education, access to objective and transparent information about the quality of the different providers are necessary for consumers to make accurate decisions. A voucher system needs to promote access to information on school quality to allow families to behave as competent consumers (...) <p>Market advocates tend to think of families as “benefit maximizers” or as educational actors whose decisions are guided exclusively by instrumental rationality.</p> <p>About directors and educators</p> <ul style="list-style-type: none"> • schools in question will treat maximizing children’s learning outcomes as their clear priority; in fact, schools often have other interests and agendas that may be concealed from their “clients” (...). Economic theory identifies “asymmetric information” as the main factor underlying the principal-agent problem in school choice: the agent may know distinctly more about the possible 	<p>transactions, trade-offs, and outcomes involved than the principal and so be much better placed to give an appearance of compliance with the terms of the agreement while in fact putting its own interests first.</p> <p>Competition in the provision of the service</p> <p>The theory of education markets posits that it is providers’ response in the competition to satisfy consumers’ demand that ensures the highest level of market efficiency. There are two sides to this assumption: The first is encapsulated in the assertion that “school competition generates higher levels of efficiency and quality”; the second concerns the assumed levels of innovation and diversification associated with higher levels of competition (...). Under market theory one expects that numerous providers of the same service operating in the same territory will guarantee vibrant competition.</p>
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Source: Adapted from Verger, Bonal and Zancajo (2016)

Figure 5 summarizes the main assumptions, in the view of the authors of the Chilean study, of the public choice theory applied to the analysis of education policies. From the

pedagogical goal of the class, presenting these statements, and inviting students to envision them as hypotheses that emerged from the reading of the conceptual map in Figure 4, is a way of moving forward from step one to step two of the class project. Analytically speaking this process entails, following Vicent and Wapshott's (2014) indication above, creating one first opportunity for the class participants to start confronting mainstream economic theories with their potential explanatory power vis-à-vis specific research questions. It is important to point out that at this point of the class narrative we have not made any explicit ontological or epistemological critique to the essence of orthodoxy in the making of economic theory, which is deliberate to maintain a learning environment that is not hostile for students that do identify themselves with certain schools of thought.

Now, in the description of the study I made above, I intentionally cited the author's claim for selecting Chile to explore school choice theories. Making that emphasis is central to assist me in the contextualization of the following two arguments that I present to students in this moment of the class, which intend to guide them in their thinking of *technical details* in the planning of their interview assignment: i) “[t]he trick in choosing cases is to assemble the optimal configuration of ingredients to refine a theory” (Emmel, 2013, p. 9) and ii) “respondent selection [should] be based on [preliminary hypotheses] because they are likely to have broad experience (...) [and] more quality information regarding [the topic under study]” (Manzano, 2016, p. 349). As by this time we have taken plenty of time of the course in discussing the implications of abduction and retroduction in research designs, these are ideas that should not be hard to endorse. Together, I believe, they represent a simple (but, well-grounded) rationale for reflecting on qualitative sampling, a topic that in my experience is hard to engage with, particularly with people more exposed to quantitative reasoning (Parra, 2019). That is that more than seeking for specific numbers of how many subjects to

consult or interview, the most important criteria for sampling is to research for presumably knowledgeable people (because of their credentials, but also because of their life experience) of the type of social dynamics under scrutiny.

All these ideas translate in an indication for students in the class to make at least one interview with a person that they consider key to helping them disseminating the strengths and limitations of particular (economic) theories in explaining their research question. In the experience of the course so far, some of them have decided to consult professors in the university, but some others have taken the opportunity to approach practitioners and executives from private companies and non-profit organizations, among others. The epistemological arguments expounded so far also serve a platform to think in advance how to approach the interviewees and document what they share with the student in an *objective* manner. Gladly, scholars like Manzano (2016) have explicitly reflected about it:

The subject matter of the interview is the researcher's theory and interviewees are there to confirm, falsify and, basically, refine the theory. This relationship -described as a teacher-learner cycle- is distinctive (...) It starts with teaching the interviewee 'the particular (...) theory under test' and then 'the respondent (...) is able to teach the evaluator about those components (...) in a particularly informed way' (...). Therefore the roles of teacher and learner are not static but become interchangeable between the interviewer and the interviewee during the process of thinking through the complexities of the [problem at stake] (...) [P]articipant views are explored through conversations (and not ticking boxes) (p. 355).

The example in Figure 6 is taken also from Manzano (2016) and I present it to students as one that is consistent with the methodological narrative expounded so far. If the aim of the interviews is providing researchers opportunities to refine preliminary theories, it makes little sense planning sets of questions that are excessively open-ended (which, I argue, entails endorsing the principles and procedures of induction that we have criticized in this article). Therefore, I invite assistants of the seminar to plan their conversation with experts replicating, as much as possible, this general logic. Manzano's (2016) paper constitutes a valuable pedagogical source in this regard, particularly because she presents a set of exemplar questions to design an interview protocol using CR applied thinking.

Figure 6. Example of the dynamics of an interview

Evaluator: Why do you think this patient was discharged to a nursing home? Do you think he could have gone to his own home instead of a nursing home? And I am saying this because one of the theories about this policy is that to accelerate hospital discharges, is sending people into care homes too soon. Right?

Discharge liaison nurse: Ummm ... I think at the time, this patient could have gone home and managed at home with a big care package. We could have organized three to four home care visits a day – and one visit in the night time. I think, he has gone into care because he'd been in hospital for a long time and he was scared about being on his own. Plus he had some medical issues which needed monitoring. And I think, possibly, it was also peace of mind.

Source: Adapted from Manzano (2016)

Finally, students are indicated to analyze their results and present their findings to the rest of the class. Given the background education of the students of the course, this step is expected to be challenging. As Starr (2014) notes it down, some of the common claims of qualitative researchers regarding the purpose of their analyses (e.g. to search for meaning in subjective experiences of interviews) “can look problematic to economists, given the discipline's strong beliefs in (...) objective measurement, and distrust of people's own explanations and descriptions of their thinking and behaviours” (p. 243). As I have maintained elsewhere (Parra, Said-Hung, & Montoya-Vargas, 2020), such a sense of mistrust

towards qualitative work is also justified in common practices of some qualitative researchers themselves, who often fail in providing to the general public convincing arguments on why their findings should be trusted in the first place⁶. I propose that, however, the CR-based reasoning we have developed throughout the course provides those arguments. Echoing Bazerly's (2009) message that analyzing qualitative data consist of *more than identifying themes*, the logic of contrasting theories with key (and not random) respondents, and hence, the backup of potential theories to illuminate the analysis of narratives, provide that overall framework to read and interpret information.

With these ideas in mind, I assume that other commonly abstract topics in the teaching of qualitative research, such as coding and categorizing interview data, should become easier for students to internalize. For these more *technical* matters, I suggest consulting Olsen's (2011) text on mixed-methods research, which provides straightforward definitions that, given her background as a professional economist, might find more resonance among participants of the class than alternative textbooks. For example, she defines a code as "a summary term which helps you to recover or retrieve some of the data in a highly purposeful

⁶ I find Pawson's (1996) critical comment to common arguments defending unstructured interviews, still valid today: "Data collection has the task of creating a conversational setting in which the information provided is faithful to the frame of reference of the respondent. The investigator offers minimal steering of the research topic within broad areas of discussion as they seem appropriate to each respondent. Critics of such an approach stress that the information collected in such a situation is diverse and discursive and thus hard to compare from respondent to respondent. Researchers are accused of selecting from this massive flow of information and thus fitting together small fragments of the respondent's utterances into their own preferred explanatory framework. Whilst the data is supposed to emerge in 'mutual' understanding, the researcher's theory is never clearly on view to the subject" (p. 298).

way” (p. 46), where the purpose, I insist to students, is precisely the exploration of potential explanatory theories backing up their research designs. One specific activity integrated into this debate in the class is inspired by Mallette & Saldaña’s (2018) proposal to use gaming to introduce a general logic to organize and classify qualitative information. Several rounds playing the party game *Pickles to Penguins*, as these scholars suggest, has a potential value in making young researchers familiar to the logic of “building associations and creating themes—just two facets of *thinking qualitatively* for data analysis work” (p. 2. *Emphasis in the original*).

Figure 7. Format to assist in the analysis of information

Interviewee /source (A)	Findings that talk explicitly to different hypotheses (B)	Add quotes that support your finding (C)	Additional ideas and quotes (D)
	1		
	2		
	3		
	1		
	2		
	3		
	1		
	2		
	3		

Back to their class assessment, at the beginning of the practical data analysis module, I print and distribute copies to the student's the table in Figure 7 and indicate their use to assist them in their analysis of the qualitative information they retrieved. As one can infer, this format attempts to represent what an actual coding exercise using, for instance, a

software (e.g. Nivo) might look alike⁷. In column A they must type an identifier for the social actor (e.g. professor of medicine) they interviewed and column B invites the student to write down, in her own words, how did this person react to each hypothesis (numbers here refer to possible hypotheses). I claim that searching for relevant quotes in this case (to type them down in column C) should serve not only as a way of retrieving evidence to present to the general public to support their findings but also as an opportunity for them to confront (and verify) their judgments (written in column B) with explicit ideas expressed by key informants. Finally, column D is reserved to report other relevant ideas that will probably emerge from conversations, but that students might find difficult to categorize, a priori, in other sections of the format⁸.

⁷ I take this opportunity also to convey to students the strengths and limitations of Computer Assisted/Aided Qualitative Data Analysis Software (CAQDAS) and why, in certain cases, they might not offer real advantages over a *Word* or an *Excel* spreadsheet. Here I am replicating the learning from experienced researchers that “unlike statistical software, the main function of CAQDAS is not (...) to analyze data, but rather to aid the analysis process, which the researcher must always remain in control of. In other words, researchers must equally know that no software can analyze qualitative data. NVivo and all other CAQDAS are basically data management packages, which are there to support the researcher during the data analysis process (Zamawe, 2015, p. 15)

⁸ Given that the aim of the interviews, as I have presented it to students, is to offer insights into valuable knowledge in the minds of key informants to help to refine preliminary theories, it is crucial to maintain certain openness in the analytical process to gain insights from unexpected phenomena. However, as I discuss it elsewhere, the fact that these possibly unexpected insights have emerged while discussing specific hypotheses, this specific conversation mode provides better analytical tools and intuitions, vis-a-vis the open-ended question scenario- to integrate them in the process of building of causal explanations.

In the last session(s) of the class, the assessment finds closure with individual presentations by students to the class, where each of them presents their research question(s), the conceptual map with possible theoretical connections between elements of the problem, and their qualitative findings either confronting or validating those initial assumptions. In the following and (last section) of this article, I emphasize, once again, the strengths of this general approach of the class, vis-à-vis the main goals of the broader reflection on introducing heterodoxy in the classroom.

Discussion: qualitative thinking and the exploration of alternative theories

I started this article by citing Chang's (2014) view on pluralism as he presents it in his best-seller book *Economics: The User's Guide*. I will expand that same quotation here, as I think it will help me in processing the main points I want to develop in this last section:

Contrary to what most economists would have you believe, there isn't just one kind of economics (...) [Different] schools are not irreconcilable enemies, however; the boundaries between schools are actually fuzzy (...) And none of these schools can claim superiority over others and still less a monopoly over truth. One reason is the nature of theory itself. All theories, including natural sciences like physics, necessarily involve abstraction and thus cannot capture every aspect of the complexity of the real world. This means that no theory is good at explaining everything. Each theory possesses particular strengths and weaknesses, depending on what it highlights and ignores, how it conceptualizes things and how it analyses relationships between them (Chang, 2014, p. 69).

In seeking to endorse this vision on how pluralistic thinking should operate -by searching for the best among different potential theories- one of my central arguments expounded throughout the article is on the key role of qualitative reasoning in such an endeavor. I think it is risky to simply replace an orthodox theory for a heterodox one to explain specific social problems, without making an explicit effort to contextualize different theories and explore their power to explain. The flexibility and openness of qualitative research designs offer methodological tools for researchers to reflect on the suitability of different theoretical frameworks across contexts and issues. However, one must not take that flexibility for granted; I maintain that only certain approaches to qualitative research deliver those tools to novel and experienced investigators. Combining abductive and retroductive inference logic in planning data collection and analyzing it, as I have argued, provides a clear methodological avenue to meet such analytical goals.

How does this narrative link to the idea of pushing for heterodoxy in the classroom? Even though I think that answer is (at least) implicit in the arguments developed in the text, it is worth emphasizing once again in the recommendation made by Mearman, Wakeley, Shoib, & Webber's (2011) on how essential it results "that the tutor employing pluralism is careful in their delivery" (p. 54). I find also important restating that my aim in the course is not to introduce heterodox economic theories, *per se*, but rather to motivate students to think critically about certain theories and, hence, eventually, sparking their interest in seeking better (e.g. more context-relevant, more convincing) ones. As their individual reflection (in the course assessment) departs from their preferences on certain schools of thought (and I assume, that most of them are influenced by orthodoxy) my bet is that their eventual interest in seeking for heterodox alternatives will emerge as a result of internal motivation, and not due to an imposition by the tutor (Parra, 2018).

While I present all these ideas in the specific context of teaching economics, I would also like to insist that I believe that my pedagogical strategy is applicable in efforts to teaching qualitative skills more broadly. It is to say, my proposal should not be read as simply adapting the contents of regular courses in the subject matter for the comprehension of students whose background is more linked to the learning of quantitative research methods. Maxwell (2013) writes in the preface of the last edition of his popular *Qualitative Research Design: An Interactive Approach* that his (relatively recent) endorsement of the CR position responds to his awareness that it “is not only compatible with most qualitative researchers’ actual practices, but can be valuable in helping researchers with some difficult theoretical, methodological, and political issues that they face”. I agree with his appreciation that CR helps to solve traditional debates and dilemmas among qualitative researchers by offering a common ontological ground from which to start proving them explicit answers. That is the feature of this paradigm that, I believe, helps to convey the meaning and real potential of qualitative analysis across epistemic communities.

Finally, it is worth noticing that in my course I emphasize only in interview methods, leaving aside other popular and important data collection and analysis techniques, such as focus groups or participant observation. I took that decision deliberately as, in my experience, interviews represent a tool that economists already use, but usually do not place much importance in the methodology behind them. From the feedback I have received from my students, this assumption seems to be well sustained, as they seem to appreciate learning the skills I present them. Saying that I am not implying that other qualitative tools are not relevant to economic research. However, I do believe that similar principles apply to teach them and apply them, a hunch that future studies (and course outlines) should explore.

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