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STUDYING THE SITUATION OF YOUTH IN EUROPE:

BRINGING TOGETHER METHODOLOGIES FOR INTERNATIONAL COMPARISON

Sonia Bertolini and Dirk Hofäcker (Eds.)

Working Group 4
"Enhanced tools of comparative youth studies"

Working Paper

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CHAPTER 1

STUDYING THE SITUATION OF YOUTH IN EUROPE: BRINGING TOGETHER METHODOLOGIES FOR INTERNATIONAL COMPARISON

Sonia Bertolini, University of Turin, Italy
Dirk Hofäcker; University of Duisburg-Essen, Germany

Introduction

The situation of youth and possible policy measures to improve their situation represent a complex phenomenon that can only be sufficiently addressed by using both quantitative and qualitative methodologies. On the one hand, it is important to gain representative knowledge about the situation of youth and its determinants from *quantitative* data. The improved availability of longitudinal data increasingly enables analysis of such relationships from a causal perspective and by considering developments over longer timespans. Q*ualitative* data can, on the other hand, aid understanding the situation of young people by e.g. looking at individual perceptions and interpretations, motives etc. Qualitative studies may also help to develop new and innovative 'mixed methods'. These may be restricted to the 'classic understanding' of combining quantitative and qualitative approaches, but they may also encompass different methodologies within quantitative and/or qualitative research.

For both quantitative and qualitative methodologies in youth research, one major challenge is how to compare results across countries. How can, for example, the international variability in structural and cultural conditions be considered when conducting explicit cross-national research, or when assembling evidence from different countries? A particular question in this regard is how institutional data at the (societal) macro-level and individual data at the micro-level can be considered in analyses.

The aim of this working paper is to provide examples of most recent methodological approaches in empirical research on youth that traverses national and/or methodological boundaries. To this end, we consider:

- Theoretical studies that discuss *how quantitative and qualitative methodologies can be combined* to gain better understanding of the situation of young people (e.g. the chapters by Goglio and Bertolini, Santero and Solera, Gröber or Moiso in this working paper).
- Empirical studies that combine different qualitative methods (e.g. Carreri and Dordoni in this working paper)
- Studies that use one methodology, but highlight its specific challenges in cross-national comparative research, considering both qualitative (Bertolini and Unt, in this working paper); or quantitative examples (Stanojević and Filipović, Gasparovic et al., in this working paper).

In this chapter, we summarise key conclusions that can be drawn from individual studies produced as part of YOUNG-IN on a more general basis, thereby highlighting possible best practices that may be applied in future research. For reasons of analytical clarity, we structure our discussion into a general methodological section (part 1) and one more focused on comparative analysis (part 2).

Our aim in this chapter is not to give an all-encompassing overview of practices of mixed-methods research or internationally comparative approaches as such, since there are several good textbooks that provide such a synoptic view. Instead, we focus particularly on key challenges and the innovative approaches developed within the COST-Network 'YOUNG-IN' to deal with these challenges, and what can be learned from them. In each of these parts, we thus derive specific recommendations for future research on youth.

1. Chances and challenges of mixed-methods approaches

Until the mid-1980s, qualitative and quantitative approaches were strongly polarized (Freshwater 2007). They were derived from different theoretical notions, used very different methods, and had quite separate orientations: one approach was directed towards objectivity; the other towards subjectivity (Letherby et al. 2013).

The outcome was that scholars argued fiercely over the superior capacities of one approach or the other, and combinations were almost never to be seen. This perception, however, changed over the following years. Ten years later, Tashakkory and Teddlie (1998) pointed to a novel approach, highlighting that "[M]ixed method is the combination of qualitative and quantitative approaches in the methodology of a study […] [M]ixed-methods research has evolved to the point where it is a separate methodological orientation with its own worldview, vocabulary and techniques." (p. x). In fact, social life and lived realities are multidimensional, and our understandings will be impoverished and may be inadequate if we view these phenomena only along a single methodological dimension (Mason 2011).

According to Small (2011), it is possible to mix different types of data in two different ways by using either the confirmatory or the complementary approach. In the former case, that of a *confirmatory* design, the researcher collects different kinds of data to investigate the same phenomenon. In this case, the aim is to ensure that the findings are largely independent of a particular kind of data collection. The promise of confirmatory designs is clearest when alternative types of data produce conflicting results. The second case (the *complementary* model) (Small 2011) involves gathering different types of data that generate different kinds of knowledge, in order to investigate the same research question from alternative perspectives. Quantitative data describe the behaviour of people, while qualitative data reflect people's expectations, norms and values, allowing researchers to reconstruct the strategies and mechanisms behind behaviours. Both the designs can be parallel or sequential.

Defining an integrated quali-quantitative research design

The contributors to this working paper show that different types of data can be combined in different ways. As the literature already shows, there are different types of established mixed

methods research designs, such as complementary or confirmatory, but it is possible to find other combinations in the literature.

Santero and Solera, for example, exploring the beliefs of junior researchers about how entry into academia works and should work (empirical and methodological studies on this issue are rare!), use a mixed-methods exploratory and confirmatory sequential research design. In particular, they use the results of their qualitative empirical exploration to define the subsequent quantitative questionnaires. They then test the generalization of qualitative results with quantitative data.

Empirical evidence on what counts and should count in obtaining a permanent post within the precarious Italian system of academia shows that a mix of 'old' and 'new' criteria and rhetorics coexist. In young researchers' views, without gender differences, 'meritocracy' (reflected in, for example, internalization and publications) counts a great deal, and it is perceived as fair. Yet also 'bureaucracy' and 'loyalty' (i.e. internal and external networking, relationships, the role of the supervisor), in contrast with senior researchers' views, also count a great deal – indeed too much. This suggests that young researchers feel entrapped by the logic of 'publish or perish', of being unconditional workers (the 'new') and at the same time by the logic of having a strong internal sponsor ('the old'). Internationalization and soft skills should count more, amid less precarious paths and prospects.

In her contribution on young people's perception of science, Gröber describes a similar research design in which first a qualitative study – using the innovative qualitative methods of mind maps – is conducted in order to provide input for a subsequent quantitative study. As in the case of Santero and Solera, this particular sequential design (qualitative before quantitative) seems appropriate in a field about which only a limited body of knowledge exists. Qualitative methods can then establish a substantial 'knowledge base' on which later quantitative research can build.

Goglio and Bertolini use a mixed-method approach based on mixed data collection and sequential and complementary design, but in a reverse sequential order. The chapter studies the phenomenon of high dropout rates, or conversely low completion rates, in Massive Open Online Courses (MOOCs), which have been typically extremely high (according to Jordan (2015) and Reich (2014) only 2% to 10% of individuals who registered for a course actually earned a certificate of completion). This feature has been considered a structural weakness of MOOCs, questioning their sustainability and efficacy as resources for lifelong learning. Using a first stage of survey data and a second stage of qualitative data from semi-structured interviews, the chapter contributes to identifying different patterns of dropout, differentiating between the strategic selection of educational material and real dropouts due to a lack of motivation or abilities. In fact, thorough investigation of the phenomenon, involving both quantitative and qualitative data, highlights that the decision to drop out from a MOOC can have different meanings and can be qualitatively different depending on the individual characteristics of the individual learner.

Recommendation I.1.

In comparative research on youth, researchers can choose between different research designs with which to integrate quantitative and qualitative data. However, it is important that they are integrated, first in the initial research question and then in all the subsequent

steps of the research design. From the outset, the role of the different data should be decided in each analytical step.

Defining an integrated research design in qualitative research

Carreri and Dordoni's chapter in this working paper also describes how different qualitative methods – i.e. visual and digital techniques – can be combined. The authors highlight the added value of using visual methods to explore the places and times of home/work 'through the eyes' of participants and their representations beyond the discursive level. The chapter discusses how to deal with the methodological challenges raised by the COVID-19 pandemic and its potential for fostering future research practices beyond the emergency.

Recommendation I.2

Different qualitative methods can also be combined. Again it is important to define which aspect of social reality is focused on by each method; and again, the method must be integrated from the outset. Moreover, adopting a non-directive research methodology makes it possible to overcome pre-set logics and conceptualizations – an approach which is particularly useful in the field of youth studies.

Linking macro and micro levels

From a methodological point of view, linking the macro-institutional context with subjective individual experience is a challenge, and especially so from a comparative perspective. The international variability in structural and cultural conditions needs to be considered when conducting explicit cross-national research, or when assembling evidence from different countries. The particular question in this regard is how institutional data at the (societal) macro-level and individual data at the micro-level can be considered in analyses.

The chapters by Moiso and by Bertolini and Unt in this working paper use this approach and underline this importance.

Moiso's chapter argues that looking at how young people manage money, what monetary resources they can count on, and how they administer expenditures provides important insights into how, in a given institutional context, state support, income, and debts are interconnected in the representations and strategies of young people. An important factor determining the differences among young people in Europe concerns the impact of different institutional contexts on living conditions. European states differ in their welfare systems and labour markets, but they do so also in some other institutions that are increasingly important in times of financialisation of the economy: the financial markets and banking systems that govern access to credit. In order to fully understand the impact of the joint interaction of these institutional contexts on young people's lives, besides macro-analysis of the main characteristics of these contexts, attention should be paid to everyday experiences and practices with in-depth research methods, like semi-structured interviews and household ethnography, which give young people a voice. Such methods bring out different rationalities in young people's accounting and budgeting practices and in their devising of strategies to 'make ends meet', without assuming that the – often paternalistic and normative – representation of rationality proposed by the 'experts' is the only one possible.

In the research reported in Bertolini and Unt's chapter (in this working paper), the definition of the sample of youth at risk of social exclusion was problematic because it varies among

countries, due to the different labour market regulations and economic situations of the countries concerned. For example, highly-educated young people in Germany are not at risk, but they could be in Greece and Italy.

In this case, to resolve this difficulty, quantitative data were used. A preliminary analysis using comparative quantitative data enabled Bertolini and Unt to identify more precisely the characteristics of youth at risk of social exclusion, taking into account the distinctive features of each country. In this way, the researchers built a common but flexible sampling plan.

Recommendation I.3

When conducting comparative research on young people, applying a mixed-method approach is a good strategy. Using this approach, which is based on mixed data collection and a sequential design, and which involves a first stage of survey data and a second stage of qualitative data, helps to identify various interesting patterns. It enables the scrutinizing of societies and their specific features from within, i.e. from the perspective of an active agent recognizing the cultural, institutional and social contexts.

2. Challenges of cross-national comparison

Introduction

The second major challenge in European research that this working paper deals with – besides the issue of mixed methodology (see section I) – is that of cross-national research among countries. Particularly with the availability of cross-national comparative survey data across Europe – such as that of the European Social Survey (ESS; Jowell & Billiet 2007), the European Labour Force Survey (Eurostat 2022) or the European Survey on Income and Living Conditions (EU-SILC; Wirth and Pforr 2022) – this research has vastly increased in popularity. From a definitional standpoint, the term 'cross-national research' denotes any research in which data emanate from more than one single country, ranging from two-country comparisons to broad EU-wide studies. It aims to observe and analyse social phenomena in different countries, "developing explanations for their similarities and differences" (Andreß et al. 2019: 2). In the most common quantitative comparative research, this approach in principle attempts to apply "the same techniques of data collection and analysis which are characteristic of 'non-comparative' surveys" (Nowak 1977: 4). However, the fact that more than one country is considered raises a number of challenges for the researcher which we will outline in what follows. This applies particularly to comparative research in which analyses are performed not only purely at the macro-level but also at the micro-level, while nations are considered as relevant contexts (Kohn 1987) – a perspective that today features prominently in comparative social science research.

When focusing on youth research– which puts the individual young person into the analytical focus – the most obvious restriction is that the relevant macro-context in which this person lives may differ from country to country. These different contextual patterns may influence the understanding of concepts vital in youth research, including, to begin with, the concept of youth itself. At the same time, different contextual patterns (such as legal systems or

cultural norms) may influence the options available to young people, thereby expanding or restricting their possibilities for individual action. One major challenge in youth research from a methodological point of view lies in the linkage of such macro-institutional contexts and their aggregate outcomes with individual action, as often described theoretically by James Coleman's macro-micro-macro scheme (Coleman 1990).

In what follows, we outline the main challenges in cross-national comparative research on youth, ranging from the definition of the target group of 'youth' to the various steps of a research project: from the selection of a specific research design, through the definition of concepts, the construction of research instruments, to the analysis of the data. For each of these points, we will outline major challenges and possible solutions for them. In doing so, we will particularly refer to novel and innovative findings reported by the authored contributions in this working paper. Most of the discussion will concern quantitative research, which to date has been the dominant research strand. However, we will also highlight the promising potential of qualitative research across countries and most general guidelines for such a research approach.

Finally, the majority of the research undertaken within the COST initiative took place during the COVID-pandemic, which restricted not only personal contacts, but also opportunities for research. Notwithstanding these predominantly negative effects, the pandemic also gave us an opportunity to learn about the challenges of cross-national research in exceptional societal situations, and how to react to them. We will outline these challenges in the final part of this section.

Definition of youth

One initial challenge in cross-nationally comparative youth research consists in the definition of youth itself. In cross-national research (such as that by international organisations, e.g. the UN, OECD or Eurostat), young people are usually defined by standardized and unique age categories (e.g. 15-24 years, UN 1981) which broadly cover the phase between the completion of education and the entry into employment and the coming of age. For certain types of statistical comparisons, these definitions may indeed be partly helpful. Yet, given cross-national differences in voting age (Eichhorn and Bergh 2020) or school graduation (OECD 2021: 440), the substantial meaning of the term 'youth' may differ in different country contexts.

Furthermore, an additional challenge may arise in the definition of specific *subgroups* of youth. Bertolini and Unt (in this working paper) highlight this problem by pointing to the issue of youth that is 'socially excluded' (see also Rokicka et al. 2015). But what 'social exclusion' actually means may differ among countries. As the authors highlight, groups at risk of social exclusion may differ across countries, so that, for example, higher-educated young people are not a risk group in countries such as Germany, but they are a risk group in Greece or Italy (see Bertolini and Unt).

The two authors point to possible solutions to this problem One such solution would be to use comparative quantitative data from previous research (or own analyses) in order to identify those young people at risk of social exclusion in their respective context.

Alternatively, research could draw on specific national expertise – e.g. by involving researchers from the respective countries as 'national experts' on social exclusion – in order to define the category of youth or specific groups of youth appropriately. In any case, the results of such considerations could be to define youth at risk of social exclusion differently across countries, on the basis of criteria contextual to the situation/transition under study, rather than applying a too strict, and contextually unsuitable, single definition across countries.

Recommendation II.1

Given that the meaning of standardized and unique concepts of 'youth' may differ among countries, it seems more appropriate to define them by means of contextual criteria established through national expertise or previous research. This may entail deviating from standardized and identical definitions across countries.

Selection of a specific research design

As outlined in the introduction, there are different options in cross-national research design. One can differentiate between *small-N studies* – involving just a few purposefully selected cases – and *large N*-studies, which incorporate a large number of countries within, for example, a certain geographic area; typically representative of the latter case would be comparative studies across all 27 EU countries. Small-N studies frequently allow for a more in-depth investigation of specific country cases and are thus most often found in rather qualitatively-oriented research; but they can also be used with specific quantitative techniques. While such studies can analyse the characteristics of specific countries in detail, they are often confronted with the problem of many variables but too few cases (Lijphart 1971: 686); i.e. the small number of cases makes it difficult to obtain more generalizable results. This problem is addressed by increasing the number of studies in large-N research, which often aims at the establishment of general causal relationships at a generalizable, representative level. However, even in broad cross-EU or cross-OECD studies, the countries have not been selected at random, thereby restricting the use of statistical analysis (e.g. Ebbinghaus 2005). Furthermore, the possible increase in generalizability comes at the cost of potentially overlooking cross-national heterogeneity in standardised analysis assuming comparatively simple types of causal relationships. Here, the increasingly widespread method of Qualitative Comparative Analysis (QCA; Ragin 1987) – based on Boolean rather than linear algebra – enables the assessment of more complex causal relationships, including the principle of equifinality (i.e. different sets of factors that may generate an identical result) – a method that has also been applied in recent research within the COST-Framework (Lauri et al. 2023).

Particularly in small-N designs, another major decision in the selection of a research design concerns the question of whether similar or diverse countries should be compared. This choice is often referred to as being between a "*most similar cases*" and a "*most different cases*" design (Mill 1974, Przeworski and Teune 1970). While the main advantage of a most similar cases design – i.e. a design in which the selected cases are similar in most relevant characteristics but not the outcome variable – resides in the identification of possible (non-similar) factors that explain differential outcomes while being able to hold alternative explanations constant. In contrast, a 'most different cases design' – i.e. a design in which the

selected countries are mostly different in their characteristics but share a common outcome – may help to identify the (similar) factor that produces this outcome.

There is no general answer to the question of which of the design variants outlined above should be chosen, and the selection will often have to comply with the particular research questions of interest to the analyst.

However, Stanojević and Filipović (in this working paper) highlight that there should be at least a certain basic similarity among the countries with regard to the topic researched. As they explain, studies on political participation, for example, may quickly reach their limits in 'young democracies' with still underdeveloped democratic institutions and practices.

Recommendation II.2

There is a certain flexibility in the choice of an analytical design in comparative research, which largely depends on the research question. **However, there should be at least a certain basic similarity among countries with regard to the topic researched.**

Identification of concepts

Even if there is a certain minimum similarity in the issue(s) to be researched, there may still be differences in their concrete meaning(s). Again, Stanojević and Filipović (in this working paper) provide an example by showing that, in more advanced democracies, there are opportunities for political participation, but the concrete forms of and motives for political participation may still differ. Thus, when speaking of political participation in these countries, one may thus refer to (at least partially) different phenomena. As Stanojević and Filipović emphasize in their contribution, "caution is necessary" (p.71).

They outline two possible solutions in such cases within their quantitative methodological approach. On the one hand, when designing a study oneself, integrated into the questionnaire should be additional indicators that cover relevant dimensions of the meaning of political participation and make it possible to explore its variable understanding across countries. However, particularly when performing secondary analysis of already-existing data, such opportunities do not exist. In this case, Stanojević and Filipović recommend using further contextual variables from aggregate macro data, such as, in their case, indices of democracy or categorisations of different political regimes so that certain indicators can be embedded in their cultural and institutional settings. By these means, they argue, the analyst will be better able to "recognise whether different socio-political systems have the same or different forms of participation and whether there is a (linear) relationship between the degree and form of participation" (ibid., p.75).

The availability and appropriateness of such contextual indicators may, however, be limited. In such cases, purely quantitative approaches may reach their limits. In this case, further qualitative investigation may be able to inform quantitative research about the different meanings of concepts across countries. In this regard, Moiso (in this working paper) uses the example of studying young people's views on financial administration and management in a comparative setting. She argues that, in order to understand these views, it is important to consider nation-specific banking and credit systems, which may create different conditions

for young people's action and behaviour, e.g. through different regulations on the granting of credit. She demonstrates how the in-depth analysis of semi-structured qualitative interviews can aid understanding of how, in a nation-specific way, "financial instruments are socially rooted" (p.81) and what discrepancies exist among countries.

Recommendation II.3

Even within countries with a certain similarity in the issues to be researched, there may still be differences in their concrete meaning. Such differences can be addressed by the following means: 1) in questionnaire design: prospectively add indicators to questionnaires that help to explore such differences, 2) in secondary analysis: include contextual indicators in the analysis; or 3) generally complement quantitative research with qualitative studies that help to explore diverse meanings.

Choice of indicators

A similar case can be made for the choice of specific standardized indicators within cross-nationally comparative research. While there are without doubt indicators that may be straightforwardly used in comparative research (e.g. Fachelli and López-Roldán 2021), there may occasionally be problems of cross-national standardization. These problems and possible solutions for them are also addressed by the authors of this working paper.

Gasparovic et al. (in this working paper), for example, show that some frequently used indicators, such as the distinction between urban and rural, may differ with regard to their meaning and their linkage with specific numerical values. In other words, what constitutes a rural or urban setting and what 'typical sizes' (in terms of inhabitants) rural and urban settings have, may vary among countries. In their own study, the authors (op. cit.) tackled this problem by relinquishing such standardized categories and instead asking respondents for their concrete place of residence and then assigning the type of settlement on the basis of this information.

Similar adaptations will also often need to be made when comparing different educational systems, either generally or with regard to specific structures within them. Gasparovic et al. also highlight this case when they show that the task of assigning study programs to a specific science field may prove to be difficult among countries, given their differential systems of higher education. The authors solved this problem by reverting to existing lists of scientific fields (for example from the OECD), which enabled them to achieve a better classification.

Recommendation II.4

Certainly, there are several indicators which can be straightforwardly compared among countries. However, in specific cases, even standard socio-demographic criteria may cross-nationally differ in their meaning. In comparative research, these differences should ideally be addressed by adopting an open questioning format when designing a questionnaire or, where possible, by referring to external categorisations provided by expert organisations.

The potential of comparative qualitative research

In the foregoing sections we have outlined which particular challenges arise for quantitative research when it is conducted on an international scale. We have also suggested how such challenges can be addressed while in general maintaining a primarily quantitative design.

An alternative, although hitherto largely underutilized, approach consists in the implementation of a comparative qualitative design. Bertolini and Unt outline in their contribution to this working paper what such a qualitative design might look like, and they provide a list of 'must do's' for such a research approach, including standardization of the qualitative process of analysis, and ensuring the replicability of the collection of data as well as the replicability of the analysis process as a whole.

The main strength of this approach is that it does not merely look at the actions and transitions of youth, as quantitative research does, but also considers the underlying processes and mechanisms that drive such actions. In doing so, such an approach 'opens the black box' of young people's actions and behavior and implicitly also gives young people a voice, instead of relying solely on the representation of rationality proposed by the scientific experts (see also section 1).

In doing so, it also provides a tool with which to understand why such reasons, meanings and motives differ among countries. Especially, when used in conjunction with quantitative comparative research conducted to establish 'objective facts', qualitative comparative research, by looking at the 'subjective side', provides a potential means with which to fulfill the promise of establishing a well-grounded link between the contextual macro-level background and the individual level of actions and interpretations of young people themselves.

Recommendation II.5

Complementing comparative quantitative analyses with comparative qualitative research is a promising opportunity to tackle the possible challenges and problems of cross-national research. It is a potential means to fulfill the promise of establishing a link between the contextual macro-level background and individual actions, and this should be featured more frequently in future European research, but also in research funding.

Recommendation II.6

For the implementation of a qualitative comparative methodology, it is important to standardize the process of analysis, ensure the replicability of the data collection method, and guarantee the replicability of the analysis process (through standardization and saturation of the sample).

Cross-national research in times of the pandemic

As mentioned earlier, a large part of the research within the YOUNG-IN network took place during the COVID-19 pandemic, in which personal contacts were often restricted. Particularly on a transnational basis, travel was often conditioned by specific legal regulations that forbade entry in general or made it dependent on specific medical conditions. Furthermore,

due to home office regulations, the place of work shifted, and the line between work and private life became spatially blurred (Carreri and Dordoni, in this working paper).

The restrictions affected research in multiple respects which we will now briefly outline, together with possible strategies to deal with such challenges. We hope that these reflections help to draw conclusions for comparative research in exceptional societal situations.

The most obvious way in which research was restricted was the frequent inability of the researchers to meet in person during the COVID-pandemic, thereby impeding immediate face-to-face communication. The usual way to deal with this restriction was to communicate via videoconferencing. While this generally allowed for personal contact, Gasparovic et al. (in this working paper) highlight how technical restrictions such as breakdown in videoconferences slowed communication among the scientists. Furthermore, personal contact was not as close as in meetings on-site, thereby limiting the opportunity for intense work. As the authors highlight, meetings were often used only for discussion without it being possible to work intensively in direct collaboration (face-to-face) on, for example, survey instruments. The pandemic situation thus underscored the importance of personal communication on-site to ensure optimal framework conditions for scientific cooperation.

Contact restrictions, however, also impacted on the field phase because personal quantitative interviews using, for example, the CAPI or PAPI method were frequently not possible. Given these restrictions, the authors resorted to other survey methods, including computer-assisted web interviewing (CAWI) (Gasparovic et al., op. cit.) which requires no direct contact between interviewer and interviewee. However, the more impersonal interview situation imposed restrictions on the construction of the questionnaire. Furthermore, the willingness to participate in such interviews is often less than in classic personal interviews (e.g. Lüdtke and Schupp 2017, Thériault 2013), even though CAWI can also have positive effects on the quality of answers (e.g. Cocco and Tucci 2012). More research on different modes of interviewing will be needed to further investigate and understand the consequences of such modal changes.

Furthermore, because the research by Gasparovic et al. was on students at three different universities, the approval of legal bodies at those universities had to be obtained. Given that contact restrictions applied also to university administrators, and home office-working was frequently practiced, it also became difficult and time-consuming to attain such approval, with the consequent delays in the research process.

Finally, also contacts with the target population of students were restricted throughout the pandemic because lectures and seminars were often conducted entirely online. The research group of Gasparovic et al. addressed this challenge by intensifying their recruiting efforts, e.g. by using online platforms for the dissemination of the questionnaire, as well as by expanding their contacts with administrative bodies at the participating universities. In the end, these additional efforts ensured that the targeted sample size was reached.

Recommendation II.7

An exceptional societal situation, such as the COVID-pandemic in the 'lifetime' of the YOUNG-IN project, may particularly complicate comparative research at various levels (communication between scientists, development of instruments, fieldwork etc.). However, while it increases the necessary research efforts, there are ways to address this situation, such as intensified recruiting or the adaptation of alternative survey modes. More

research in the future will be needed to assess the methodological implications of such adaptations.

Figure 1.1: Summary: Recommendations for Mixed Method Research

Defining an integrated quali-quantitative research design

1. In comparative research on youth, researchers can choose between different research designs with which to integrate quantitative and qualitative data. However, it is important that they are integrated, first in the initial research question and then in all the subsequent steps of the research design. From the outset, the role of the different data should be decided in each analytical step.

Defining an integrated research design in qualitative research

2. Different qualitative methods can also be combined. Again it is important to define which aspect of social reality is focused on by each method; and again, the method must be integrated from the outset. Moreover, adopting a non-directive research methodology makes it possible to overcome pre-set logics and conceptualizations – an approach which is particularly useful in the field of youth studies.

Linking macro and micro levels

3. When conducting comparative research on young people, applying a mixed-method approach is a good strategy. Using this approach, which is based on mixed data collection and a sequential design, and which involves a first stage of survey data and a second stage of qualitative data, helps to identify various interesting patterns. It enables the scrutinizing of societies and their specific features from within, i.e. from the perspective of an active agent recognizing the cultural, institutional and social contexts.

Figure 1.2: Summary: Recommendations for Comparative Research

Definition of youth

1. Given that the meaning of standardized and unique concepts of 'youth' may differ among countries, it seems more appropriate to define them by means of contextual criteria established through national expertise or previous research. This may entail deviating from standardized and identical definitions across countries.

Selection of a specific research design

2. There is a certain flexibility in the choice of an analytical design in comparative research, which largely depends on the research question. However, there should be at least a certain basic similarity among countries with regard to the topic researched.

Figure 1.2 (ctd.): Summary: Recommendations for Comparative Research

Identification of concepts

3. Even within countries with a certain similarity in the issues to be researched, there may still be differences in their concrete meaning. Such differences can be addressed by the following means: 1) in questionnaire design: prospectively add indicators to questionnaires that help to explore such differences, 2) in secondary analysis: include contextual indicators in the analysis; or 3) generally complement quantitative research with qualitative studies that help to explore diverse meanings.

Choice of indicators

4. Certainly, there are several indicators which can be straightforwardly compared among countries. However, in specific cases, even standard socio-demographic criteria may cross-nationally differ in their meaning. In comparative research, these differences should ideally be addressed by adopting an open questioning format when designing a questionnaire or, where possible, by referring to external categorisations provided by expert organisations.

The potential of comparative qualitative research

Recommendation II.5

Complementing comparative quantitative analyses with comparative qualitative research is a promising opportunity to tackle the possible challenges and problems of cross-national research. It is a potential means to fulfill the promise of establishing a link between the contextual macro-level background and individual actions, and this should be featured more frequently in future European research, but also in research funding.

Recommendation II.6

For the implementation of a qualitative comparative methodology, it is important to standardize the process of analysis, ensure the replicability of the data collection method, and guarantee the replicability of the analysis process (through standardization and saturation of the sample).

Cross-national collaboration in times of the pandemic

Recommendation II.7

An exceptional societal situation, such as the COVID-pandemic in the 'lifetime' of the YOUNG-IN project, may particularly complicate comparative research at various levels (communication between scientists, development of instruments, fieldwork etc.). However, while it increases the necessary research efforts, there are ways to address this situation, such as intensified recruiting or the adaptation of alternative survey modes. More research in the future will be needed to assess the methodological implications of such adaptations.

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CHAPTER 2

COVID-19 OUTBREAK AND CHALLENGES IN INTERDISCIPLINARY CROSS-NATIONAL COMPARATIVE YOUTH RESEARCH

Slaven Gasparovic, University of Zagreb, Zagreb, Croatia
Mateusz Marciniak, Adam Mickiewicz University, Poznań, Poland
Brigita Janiūnaitė, Kaunas University of Technology, Kaunas, Lithuania
Sylwia Jaskulska, Adam Mickiewicz University, Poznań, Poland
Jolita Horbačauskienė, Kaunas University of Technology, Kaunas, Lithuania
Renata Glavak Tkalić, Institute of Social Sciences Ivo Pilar, Zagreb, Croatia

Highlights

- The main challenges in cross-national comparative research are translation, differences between social and political systems, the method of measurement

- COVID-19 has had various impacts on cross-national comparative research

- Computer-assisted web interviewing (CAWI) has raised many challenges in cross-national comparative research

1. Introduction

The development and use of comparative research in various interdisciplinary and social sciences are one of their most characteristic contemporary features. The idea of cross-national comparative research is as old as the tendency to base theoretical generalizations about various phenomena on broad inductive, empirical findings. It can be found in science in regard to many different authors, from Aristotle to Marx and Weber (Novak, 1977). Cross-national comparative research is a type of research in which data from more than one country are collected and analysed. Cross-national comparative research attempts to use the same standardized techniques of data collection and analysis that characterize 'non-comparative' research (Novak, 1977). Moreover, from the perspective of social and interdisciplinary sciences, cross-national comparative research is concerned with observing social phenomena in different countries and exploring and analysing their similarities and differences (Andreß et al., 2019). Conducting cross-national comparative research is complex because of its very nature; however, particular challenges have arisen with the COVID-19 pandemic. Although, this situation has generated mainly disadvantages in cross-national comparative research, some advantages have also been forthcoming. All the challenges to cross-national comparative research are described later in the text.

This paper has two aims: first, to address the challenges of cross-national comparative youth research among different countries and second, to highlight the challenges the authors faced during the COVID-19 outbreak. This approach will also address methodological aspects of research. Nevertheless, this paper does not provide direct answers to various challenges in

cross-national comparative research; rather, it highlights them to help other authors in their future research.

2. Challenges of cross-national comparative research amid the COVID-19 pandemic

Cross-national comparative research can be defined as the comparison of political and economic systems and social structures in which one or more entities in two or more societies, cultures or countries are compared in terms of the same concepts and with the systematic analysis of phenomena, usually with the intention of explaining and generalizing them (Simpson et al., 2016). Such research involves undertaking various quantitative and qualitative analyses in different countries by creating questionnaires or interviews, conducting research among people, analysing the results, and writing papers – all of which requires many meetings of the researchers. Since the World Health Organisation (WHO) declared COVID-19 a global pandemic on 11 March 2020, various restrictions on mobility and social distancing related to the outbreak of COVID-19 have been introduced in different countries (Hadjidemetriou et al., 2020). Among other social groups, young people were also affected by the COVID-19 global pandemic. This required schools and universities to switch to remote mode, and in many ways, it restricted the various life activities of young people. This unexpected circumstance brought various challenges for the research described below, which had to be solved by the authors.

The main focus of this paper is on the challenges to cross-national comparative youth research and on how to overcome them. An additional topic is the outbreak of COVID-19, which made research even more challenging. The background is the cross-national comparative research project titled "Academic student's life and engagement during COVID-19 outbreak" conducted in three countries, Poland, Croatia and Lithuania (for more details see Marciniak et al., 2022). The main aim of the research was to investigate how the relationship between civic engagement and its determinants (various personal and socio-economic factors) would be maintained amid the difficult circumstances of the COVID-19 pandemic by students from these three countries, to determine how similar and/or different the experiences of students from different European countries are, and thus take part in the discussion on the differentiating or globalizing dimension of the experience of the pandemic. Moreover, the well-known connection between demographic characteristics and socio-psychological factors (e.g. gender, economic status, psychological well-being, self-esteem, social support) and levels of civic engagement in a pandemic crisis was explored (for more details see Bofi et al., 2015; Toffolutti, 2022). Furthermore, the project investigated whether there was an individual benefit of engaging in the community during the outbreak of COVID-19. This research yielded better understanding of psychological well-being, self-esteem, and social support (in relation to civic engagement) as protective factors during a pandemic or other multidimensional crises. The research was conducted within the framework of the collaboration of COST Action number CA17114 entitled "Transdisciplinary solutions to cross-sectoral disadvantage in youth (YOUNG-IN)", supported by COST (European Cooperation in Science and Technology) (more details are available at the following websites: www.cost.eu/actions/CA17114, www.youngin.eu). The research was interdisciplinary

because it involved authors from the scientific fields of psychology, geography and pedagogy/education. Each author contributed to the research from his/her scientific field and with his/her expertise. Nevertheless, such an approach was even more challenging because all the authors had to reconcile their points of view.

2.1. Conducting the research in online reality

The research was based on the quantitative method of the questionnaire. The online questionnaire was compiled between 14 May and 14 July 2021. The technique of computer-assisted web interviewing (CAWI) was used to collect the survey data (online questionnaire research). The main reason for using information and communication technology (ICT) tools was that they allow research to be conducted on relatively large groups of respondents and in a relatively short time. Importantly, this approach does not require direct contact between researchers and study participants, so that it was possible to conduct the research during the COVID-19 pandemic (despite restrictions on physical contact). However, to some extent, the CAWI technique compromises the quality of survey research and imposes limitations on the interpretation and generalization of data. The online questionnaire included a range of questions and used multiple scales, simple questions, and demographic data. The questions were adopted from other authors, with permission from the author(s) of the instrument, which is widely available, or with direct permission, and they were based on the reports (mainly EUROSTUDENT, see www.eurostudent.eu), and constructed by the researchers. Study participants were selected by means of voluntary sampling.

Due to the outbreak of COVID-19, the research was conducted almost entirely online (the first face-to-face meeting of researchers after the outbreak of COVID-19 took place in March 2022). This meant that a significant number of challenges arose that had to be addressed. The main idea for the research emerged at the end of 2019, but due to the spread of COVID-19 from March 2020, there was no longer an opportunity to meet face-to-face. Hence all communication between researchers was shifted to online mode, mainly by using video conferencing platforms (e.g. the Zoom platform) and emails. This mode of communication had the advantage of providing the researchers with more time slots for meetings (e.g. the possibility of holding a meeting in the evening). It is rather questionable how intensive and productive the collaboration between the researchers would have been without the use of video conferencing platforms when compared to the period before the pandemic COVID-19, when such platforms were not used with such intensity. However, disadvantages were the sometimes unstable internet connection and the fact that such meetings were only for discussion without it being possible to work in direct collaboration (face-to-face) on the questionnaire, because online work would have taken too much time during the meeting. The main challenge that arose from this situation concerned preparation of the questionnaire, so that the researchers had to make more individual efforts to work on the questionnaire and share it via email and discuss it during the online meeting. Moreover, the idea of starting the research at the end of 2019 had to be adapted to the impact of the COVID-19 pandemic.

Other challenges with online lectures and home-based work by academic staff included communication in selection of the faculties surveyed, because all communication took place online, which increased the time needed to obtain the approval of certain faculties. It must

be emphasized that due to the comparative nature of the research, it was decided to use the mixed sample method. The universities and faculties for the study were selected to form relatively homogeneous groups of respondents (purposive sampling). The selection criteria for the universities were the following: public higher education institutions (HEIs), inclusion in the World University Rankings (Times Higher Education), location in major academic centres of the respective country and offering a diverse range of degrees and study programs (at International Standard Classification of Education - ISCED - level 6 or 7). The selected universities were located in Poznan (Poland), Zagreb (Croatia) and Kaunas (Lithuania). Purposive sampling was used to select faculties where education was carried out in the scientific disciplines represented at each of the three universities. These were social sciences, humanities, and natural sciences according to the classification of the Organisation for Economic Cooperation and Development (for more details see the website: www.oecd.org/science/inno/38235147.pdf). The faculties where education in other scientific disciplines (medicine and health, engineering and agriculture) took place were excluded.

2.2. Construction of the tools

From the beginning of the questionnaire's construction, the authors were aware of three potential challenges specific to cross-national comparative research: translation from one language to national languages, differences between social and political systems, and the method of measurement (also discussed in Hoffmeyer-Zlotnik and Warner, 2014). In addition to the main research questions, the authors also had to add questions about the socio-demographic data of the students. Here some further challenges arose, because the countries involved in the research are different in some respects. For example, when investigating whether students lived in an urban or rural settlement, challenge were raised by the size of the settlements (particularly number of inhabitants), which varies from country to country. The authors had to ask the students about their place of residence and then define the type of the settlement based on their answers. After the construction of the questionnaire, the challenge of translation arose. The basic version of the questionnaire was written in English. It was then translated into the national languages (Polish, Croatian and Lithuanian), following the back (reverse) translation procedure to avoid language barriers. Translation is one of the most important steps for successful cross-national comparative research. COVID-19 Outbreak even had some positive aspects in this regard, because sharing the documents via available solutions (e.g. Google Drive) accelerated the translation process for the authors. It is important to stress that an ethics committee was involved. because this research was conducted on students using psychological scales, and to avoid any problematic ethical issue. During research planning and implementation, the principles of the 1964 Helsinki Declaration and the requirements set out regarding survey studies were followed. The research project was accepted by the Ethics Committee for Science Projects at the Faculty of Educational Studies of Adam Mickiewicz University in Poznan (No 1/16.04.2021).

After the translation of the questionnaire, the pilot study was conducted (n = 30, academic students from diverse universities, study programs, and degrees). The authors were forced to complete this task using an online solution, namely Google Forms. The pilot study preceded the main study (which was conducted on academic students from different universities, study

programs, and degrees). The analysis of the information collected by the in-depth interviews was conducted in joint meetings of all members of the research team and supervised by experts (researchers external to the research team). The analysis was conducted online via emails or the Zoom platform. Based on the feedback from the pilot study, the final integration of the research tool was performed.

2.3. Data collection

The authors had to ensure that a representative group of students from each country was available for the main part of the study. However, due to the online nature of lectures and the limited number of faculties selected for the survey, the number of students was limited. An attempt was made to circumvent this challenge by sending letters sent to different faculty bodies (e.g. deans, vice-deans, various faculties' offices, but also different student organisations).

The main questionnaire was also disseminated among students via an online Google Forms solution, with the link to the questionnaire sent according to the positive responses and instructions of the recipients of the letters of intent. Because the questionnaires were completed simultaneously in three different countries and in the months of May, June and July, the authors faced two challenges. The first challenge was the slightly different semester schedules in the three countries, and the second challenge was the lectures that were about to be completed. The authors had to resolve these challenges by distributing the questionnaire to students during the lecture period, because they assumed that more responses would be received during the lecture period than during the examination period. Notwithstanding the COVID-19 outbreak and the online questionnaire, the authors received the targeted number of responses, although they assumed that the number of responses would have been greater if the questionnaire had been distributed in person directly to students in their lecture rooms.

The research participants were selected by means of voluntary response sampling. Academic students (n = 1872) completed the questionnaires during the research period. However, when collecting data, the responses of n = 511 students were excluded in order to maintain the comparability of the groups at the three universities. The exclusion criteria were the following: studying at a university's satellite (branch) campus/faculty, enrolment on a part-time study program, and enrolment on a degree course available at only one of the universities (e.g., speech therapy). Considering the student populations of the universities in 2021, the representative samples for each of them were determined (UAM, 2021; UniZG, 2021; KTU, 2021). Thus, with fraction size = 0.5 (50%), a maximum error of 5%, and confidence level = 95% (α = 0.95), the minimum sample size for each of the three universities was identified, namely 380 people (the population of AMU students in 2021-37 000), 382 (UniZG-72 500), and 375 (KTU-16 500). Once the minimum number of students identified had been reached at each university, the survey data collection was finalised (simultaneously in all countries). To avoid collecting data at different timeslots in each of the countries (which could be troublesome for data interpretation), the authors decided to open and close the online survey at exactly the same point in time. Thus, the authors did not close each country questionnaire separately after reaching its minimum sample size (minimum number of

students meeting the inclusion criteria). Instead, they closed all questionnaires simultaneously after the "last loaded" country had exceeded the minimum sample size. For that reason, the research sample size exceeded the requisite minimum, which was most apparent in the case of Poland. The final research samples of academic students (n = 1362) from the countries surveyed were the following: Poland, n = 596 (43.8%), Croatia, n = 386 (28.3%), and Lithuania, n = 379 (27.8%).

2.4. Data analysis

Once the survey had been conducted, the next step was to standardize all the data and prepare it for analysis. The authors decided that it would be best to translate all necessary responses into English (e.g. "open" responses) so that all responses could be standardized and adapted for analysis. This standardization and adaptation encountered some practical challenges. For example, the challenge arose of assigning certain study programmes to a specific science field in order to achieve the same assignment in all three countries. This challenge stemmed from the different approaches to higher education in the different countries. Specific challenges were resolved with the help of an OECD list of scientific fields, but some other similar challenges were also resolved with similar solutions.

3. Conclusion

Cross-national comparative research is a complex research method because it is conducted among participants in several countries. For this reason, there are certain challenges that need to be resolved. This type of research, as presented in this paper, is based on the experiences collected during the conduct of cross-national research, which is described in detail in Marciniak et al. (2022). Empirical studies demonstrating the application of cross-national comparative youth research are also presented. What raised an additional challenge to all the research activities was the COVID-19 pandemic, which influenced research in certain parts. Although the COVID-19 outbreak had a great impact on the research and brought many challenges whereby the authors had to adapt several steps of the research, the above challenges were to some extent expected because the authors were aware that three countries were involved in this research and that it was also an interdisciplinary project involving researchers with different perspectives. However, the authors agreed on different ideas and approaches to address this challenge. In addition, the online research method was found to have some advantages.

This paper is a contribution to the better understanding of cross-national comparative research illustrated by an empirical example, at a time when an additional limiting factor in the form of the COVID-19 pandemic was occurring. It is anticipated that this paper will encourage authors of similar research in the future to consider the research steps presented here, with all their advantages and disadvantages.

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CHAPTER 3

DOING RESEARCH DURING THE COVID-19 PANDEMIC USING QUALITATIVE AND VISUAL METHODS: AN EXPLORATORY STUDY ON WORKING FROM HOME EXPERIENCES DURING LOCKDOWN IN ITALY

Anna Carreri, University of Verona and Hasselt University
Annalisa Dordoni, University of Milan-Bicocca

Highlights

- The paper highlights the added value of using visual methods to explore the places and times of home/work 'through the eyes' of participants and their representations beyond the discursive level.

- The paper gives an account of how qualitative, visual and digital techniques can be combined.

- The paper discusses how to deal with the methodological challenges raised by the COVID-19 pandemic and its potential for fostering future research practices beyond the emergency.

- The paper shows that adopting a non-directive research methodology makes it possible to overcome pre-set logics and conceptualizations (i.e. work-life balance), an approach which is useful in the field of Youth Studies.

Introduction

This paper stems from a research project in which we have been engaged since the very beginning of the emergency due to the COVID-19 pandemic. Among the restrictive measures adopted by governments to control the outbreak, there was the mandatory nature of working from home for 'non-primary' employees, and the closure and the reorganization of schools and childcare facilities. Since the very beginning of the project, we have been particularly intrigued by the idea of exploring the processes by which the boundaries between the public and private lives of workers were (de)constructed during the lockdown in Italy. And we have been so for three main reasons. Firstly, the pandemic has impacted profoundly on how people manage productive, reproductive and social activities in their new everyday lives. Secondly, because young/young adult workers are increasingly exposed to the risk of precariousness, more research is needed to explore the impact of the pandemic on their working and living conditions. Thirdly, the emergency has raised first-time challenges for scholars engaged in empirical qualitative research on labour processes and the work-life interface, from both a theoretical and methodological point of view.

In the paper, we focus on this methodological challenge and its potential for developing future research practices beyond the pandemic. We first explain our methodological choices and give a detailed account of the research process, in which we combined different non-directive techniques, digital and visual methods.

The context of research was the COVID-19 pandemic, which has affected people's management of productive, reproductive and social activities in their everyday lives. It has highlighted, as never before, the theoretical necessity of overcoming the binary distinction between work and life as two ontologically separate and static domains; a distinction which fails to grasp the intertwining of productive and reproductive processes and the permeability between the public and the private, as already pointed out in the literature (e.g., Fleetwood 2007; Özbilgin et al. 2011) and as belied by the domestic experiences of the lockdown lived by people working from home.

Theoretically, the research aimed to overcome this problematic conceptualization and contribute to the recent and more critical strand of work/life research (e.g., Carreri, 2022; De Coster and Zanoni, 2022) by exploring the (de)construction of boundaries during the lockdown period. In our analysis, we paid especial attention to some macro-structural drivers of work and family life: specifically, gender and family composition, social class and housing conditions, and their links to the micro-level experiences and power dynamics which became more clearly evident during the pandemic emergency, although they already existed before it.

The blurring of work/care/life boundaries in a single confined time-space during the lockdown raised questions about the structural interdependencies between work and 'non-work', with major ontological and methodological implications still to be explored. In order to meet the challenges of doing research during the pandemic, and in order to observe people's remote working experiences during the first Italian lockdown without assuming a binary vision and without influencing participants' representations, we adopted a non-directive methodological perspective in collecting and analysing multiple data, i.e. photos, drawings, written texts, and in-depth narrative video-interviews.

Research question and methodology

The salient characteristic of the methodology adopted in this project is that it sought to be as non-directive as possible. This is because the main goal of the project was to investigate the 'working from home' experience during the first lockdown after the outbreak of the COVID-19 pandemic in Italy, and more specifically how workers perceived the modification and rearticulation of spaces and times between the public and the private. Our purpose was to capture the perceptions and representations of people who worked 'locked in their homes' by overcoming the conceptualization of a 'public' versus 'private' sphere that entails a strict, binary and dichotomic division between 'work' and 'life', and between 'workplace' and 'home'.

Adopting a non-directive research perspective and, in practice, integrating visual, qualitative and digital methods, yields better insight into social actors' experiences. It deepens the participants' perceptions from the methodological point of view, and it overcomes pre-constituted and dichotomous logics and conceptualizations from the theoretical one.

Furthermore, in an attempt to understand and interpret social reality by exploring a totally new phenomenon that has affected everyone's life worldwide, the researchers' experience and point of view cannot possibly be ignored in this case. We are two female researchers interested in gender inequalities and work-life balance issues. We lived and worked at home for several weeks during the Italian lockdown, from 22 February to 4 May 2020, and beyond. We personally and physically explored new ways of doing research, as well as new ways of experiencing couple life, motherhood, leisure time and socializing.

The main part of the project was carried out using visual methods, following the principles of 'native image making' (Warren 2005, 2017; Pauwels and Mannay, 2019) and the 'participant-generated image' (Balomenou and Garrod, 2016) techniques. We decided to collect and analyse images or pictures, chosen or taken by workers who were asked to upload to an online platform an image that was representative of their 'working from home' experience, and possibly to provide a reason for their choice and socio-demographic information. Regarding the collection of visual materials, the question was open-ended: "Can you give us an image representative of your experience of working from home?". Maximum freedom of expression was given to the participants in the choice of the pictures. Therefore, the material consisted of diverse types of images, portraying different subjects and settings, and with a variety of styles and registers: on the one hand, there were images portraying the participants, their home or other objects and subjects – such as tables, books, laptops, balconies, pets, family members; on the other hand, there were drawings, memes or screenshots from TV series, more or less ironic, with or without speech bubbles/captions. Research participants came from all labour-market sectors and had different contracts, socio-economic status and family composition characteristics. The analysis of the 71 images collected is still ongoing.

In addition, we carried out an in-depth investigation using qualitative methods and focused on the academic sector. We decided to carry out 10 in-depth, narrative and non-directive video-interviews focused on young and precarious researchers (see Carreri and Dordoni 2020 - a contribution based on this study, but specifically focused only on the interviews). By using non-directive methods, the researcher could understand the participant's everyday life and his/her point of view through a relational approach that could differ for each subject. Regarding interviews, the interviewer started with an introductory question on the main theme, leaving the respondent free to answer as s/he wished. In this case, the question was: "With reference to the past and current period, in which university activities were suspended/modified, can you tell me about your personal experience of working from home and reconciling it with your private and family life?". Moreover, we added an explicit sentence to emphasize the non-directivity of the interview: "I will try not to introduce any more themes after this main question. What interests me is talking about the issues that you personally consider the most significant, without me leading the conversation". Unstructured interviews, specifically narrative and non-directive video-interviews conducted online, are characterized by enhanced flexibility and an interaction between the interviewee and the interviewer freer than that of structured or semi-structured ones (Bichi 2017).

On the other hand, the visual material provided an opportunity to observe the overlaps among settings, spaces, and indirectly times and rhythms of working and family life during the lockdown.

In our research design, academic and research work was identified as a privileged activity to observe due to the widespread use of digital devices and remote work even before the pandemic, the high degree of (real or perceived) autonomy, and the requirement of very high levels of productivity associated with the large presence of non-standard, flexible and temporary contracts – especially in Italy, where young early career researchers are employed with postdoctoral contracts which are considered to be halfway between training and work, and which do not provide the same safeguards as dependent employment contracts.

The use of information technology can have positive or negative effects on social research (Hanna 2012; Lo Iacono, Symonds and Brown 2016). They depend on the geographical context, and the digital divide must be considered. But in general, in Europe, using a digital platform to download or upload visual material, or using a hyperlink for a meeting or a video-interview, is now easy for participants as well as for researchers. Nowadays, nearly everyone in Western countries has access to the Internet, at home or through their smartphones. Also, for participants, taking a picture is very easy, because of the common use of smartphones with good cameras. Moreover, for researchers, conducting online interviews can be a useful way to carry out synchronous interviews when meeting face-to-face is hampered by external conditions (Janghorban, Roudsari and Taghipour 2014).

One of the limitations of these technological tools is a lower degree of intimacy and closeness between interviewee and interviewer. However, in a situation like ours – where for in-person meetings we had to wear face-masks and maintain physical distance – Skype, or other online platforms, probably represented the better option. Narrative interviews, lasting between 90 and 140 minutes, were conducted remotely via Skype. Recording through a private communication platform raises significant ethical questions, but circumscribing the negative elements of the instrument is possible by requesting consent and deleting all traces from the platform after the interview: "despite some of these challenges, online interviewing via videoconferencing provides a valuable opportunity to rise to the challenge of social distancing while maintaining our data collection efforts" (Lobe, Morgan and Hoffman 2020).

From a methodological point of view and given the importance of reflexivity in the research process, it should be highlighted that we used the Skype software to communicate with each other during the phases of research, analysis, discussion of the results and writing, because we live at considerable distance from each other. After a first analysis carried out individually, we worked together, sharing codes and discussing our interpretation during online meetings.

To conclude, analysis of the visual data is still being carried out using the CAQDAS – Computer-Assisted Qualitative Data Analysis Software – Maxqda to identify themes and interpretative categories in the data. Images and photos are analysed by interpreting the settings, the subjects, the overlap of spheres, such as private and public, spaces and times, such as working and personal, or family, time and space, the condition of anxiety and stress perceived. The absence of interruptions between domestic and public activities result immediately in

participants' photos, images, memes and drawings. For example, one of the images is a drawing portraying a multitasking mother: she was making a business call with one hand, and contemporarily cooking with the other hand, playing with her two children and answering their questions, and vacuuming with one leg - with no solution of continuity and in an extreme condition of immediacy and alienation due to social acceleration and immediatization (Rosa 2014; Dordoni 2017; Dordoni 2020). The Maxqda software is a tool that makes it possible to create categories, tags and labels, and to codify and analyse, at the same time, texts and images, thus enabling the closer integration of visual, qualitative and digital methods.

Results or expected results

Because our visual analysis is still ongoing, in what follows we summarize the main preliminary results.

First, one of the findings concerns the boundary (minus) problems of work, housing and class in contemporary neoliberalism. Precarious and unprivileged workers during the first lockdown had to 'squeeze' the space-time of private, family, work and social life into small apartments, where they lived and worked with family members or roommates and children. They had to share the small space available, often a table in the kitchen, which is one of the main subjects of the photos collected, i.e. a table covered with laptops. Other photos portray the difficulty of reorganizing domestic spaces in order to reserve a personal workspace, such as a compartment in the wall of the house, similar to a wardrobe, or the creation of a precarious support for the laptop. Work without borders was experienced above all by precarious loners, who worked 'non-stop' for entire days without taking time for themselves.

The housing issue acquired great importance during the pandemic from the point of view of the availability of not only internal but also external space. A balcony or terrace, more or less spacious, was – for those respondents who had one – a crucial place for rest and distraction from the home environment. Balconies and terraces were another subject much photographed by the participants. Moreover, living in an urban environment or in the countryside, or the possession of a second home in a more pleasant and natural place, played a key role in the experiences of everyday life and 'boundary work'. Importantly, these housing conditions were clearly linked with social class.

Second, another theme emerging from the visual material concerned gender inequalities and reconciliation problems. 'Squeezed' home-working mothers had to carry a heavier burden due to the 'double presence' and the pandemic's disarticulation of borders, which was exacerbated by the presence of their children, who during the first lockdown were always present even in the 'personal' moment-spaces of work. There is, for example, an image depicting a mother in bed in the evening with her baby on her legs, and the computer in front of her while she attempts to work and put the baby to sleep at the same time. Another image depicts the mother's laptop screen split into two parts: on one side there is an article she is working on; on the other, there is a video of a cartoon entertaining her daughter. Another photograph portrays the researcher's daughter jumping and playing in the same room where

she is working. These are only some examples of the 'disintegration of borders' in the case of women, and in particular working mothers, during the pandemic.

The combination of non-directive techniques, digital and visual methods helps us to critically reflect on, and possibly overcome, the theoretically problematic binary vision of work-life, as well as the idea that 'balance' is a matter of individual choice (e.g. Fleetwood, 2007; Özbilgin et al., 2011). Visual methods make it possible to investigate public and private boundaries and offline/online relationships, overcoming dichotomic and pre-set logics (De Coster and Zanoni 2022). Furthermore, from a methodological point of view, the non-directivity of our approach in collecting and analysing data – although we always bore in mind our positioning as observer researchers – enabled us to see home/workplaces 'through the eyes' of the participants, the redefinition of boundaries on temporal, spatial, and relational levels, and their representation beyond the discursive level. This methodological approach yields better understanding of how public and private are intertwined, and how 'boundary work' during the pandemic has depended on, and contributed to reproducing, traditional cleavages, such as social class, gender and parenthood (motherhood in particular) in neoliberal economies.

Finally, by combining interviews and visual data it is possible to observe the transformation and social change in the daily life of the participants, making us better aware of the blurred separation between boundaries, such as between working hours and social or personal or family time. This is especially helpful when studying youth and young adults, because they are living in the present with some of the changes that we will see better in the future. By investigating their daily life now, without directing the interviews, by letting them speak freely about what they consider relevant and by collecting photos and images chosen by them without strict instructions from the researcher, we can shed light on what are, in some way, 'glimpses of the future'. The analysis of qualitative and visual data, collected using a non-directive approach, allows us to peek from these glimpses and have a vision of different points of view, new ways of seeing the world, also from different mindsets, ages, and generations.

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CHAPTER 4

USING MIXED METHODS IN EMPIRICAL YOUTH RESEARCH: AN EXEMPLARY STUDY DESIGN

Jessica Gröber, University of Duisburg-Essen, Germany

Highlights

- Exploring the research field through a qualitative pre-study
- Using mixed methods for multiple perspectives and exploration
- Using a sequential study design to find a focus and develop the main research instrument
- Using mind maps to explore cognitive schemes of young people

Introduction

In accordance with the working paper's title, this chapter deals with methods that can be used when carrying out empirical social research on young people. An early-stage PhD project is presented as an exemplary provisional research design in which the focus is on applied methods. The project is specifically about how young people in Germany relate to science. With regard to current crises – such as climate crisis and the COVID-19 pandemic – the relationships between different groups in society and science are becoming increasingly important. This is due in particular to the fact that the ways in which these crises can be managed are often investigated and proposed by scientists and in their research, but they also must be implemented by society (for example, in the form of environmental protection). This makes it necessary for the affected groups to place their trust in scientific findings, solutions, and pleas, as well as to make their own contributions to them in various ways. In this manner, science empowers society to cope with these crises.

On the one hand, therefore, science has an interest in gathering knowledge about how different groups in society relate to it, and where potential gaps and approaches exist in education, while on the other, knowledge about this issue can also provide a basis for solving future problems that affect (global) society as a whole. One of the most interesting and important groups consists of children, adolescents, and young adults, henceforth denoted with the term '*young people*' or '*youth*'. Young people can be viewed as present and future members of society who are able to learn about science in educational settings, such as schools and universities. These institutions offer opportunities to connect young people with science and to educate them and arouse their interest in it.

However, work on this research question poses a number of methical challenges, which will be described in the following sections. As the focus of this paper is on a design and method perspective, the specific content of the PhD project is only presented to the extent necessary to understand the methods that have been applied. The sections that follow consist of a description of the research design and its difficulties and a final discussion.

Study design

As far as the superordinate research question outlined above is concerned, the first step is to define the three key concepts, which are *'young people'*, *'science'*, and *'relate to'*.

Young people. The first methodological challenge is the operationalization of the term 'youth'. Tyyskä notes that "Worldwide, there is a distinct lack of consistency in defining the category 'youth' […]. This great variety signifies both the fluidity of age categories and the degree to which they are contested globally" (Tyyskä 2005, p. 1). In other words, the definition of 'youth' is heavily dependent on areas of expertise, different cultures, and time periods, as well as other factors. To make the concept of 'youth' observable, however, a working definition needs to be set, especially for standardized quantitative research designs and sampling plans. In the particular case of planning an international comparative study on young people, the operationalization of the term 'young people' should therefore depend on cultural and research content-related considerations. In this exemplary study, the decisive factors in establishing the age range are theoretical considerations relating to German law and culture, on the one hand, and an orientation towards established empirical youth studies and their definition of 'youth' or 'young people' in Germany on the other. The design of this exploratory study means that a broad version of the term is initially advisable. Hence the target group is initially defined as young people between the ages of 14 and 29. The lower age limit is based on research ethics and data protection considerations that depend on German law and traditions (cp. ADM et al. 2021), while the upper limit is taken from the broadest operationalization of the term in an established youth study by the German Youth Institute (DJI) (cp. Gille 2018). This particularly broad version of the term makes it possible to locate age differences within this range and to identify more specific age groups of particular interest during the research process.

Science. The concept of 'science' is a subject of the philosophy of science and results in many different definitions (cp., for example, Kornmesser & Büttemeyer 2020, p. 5; Chalmers, Altstötter & Bergemann 2007, p. 5). In terms of the research question to be addressed here, it is less important which definitions are established or are the most common than which of them apply to young people. To explore these cognitive images of science, the frequently-replicated 'Draw-a-Scientist-Test' (DAST) designed by Chambers (1983) serves as a model. In addition, numerous studies, from the field of educational psychology, on *epistemic beliefs*, according to Schommer (1990), provide information about young people's beliefs about the nature of knowledge, which can be applied to this specific research question to a certain extend. But in order to go further and find out what young people associate with the concept of *science*, a more open-ended method, which will be described in greater detail in the context of the explanation of the pre-study, will be tested.

Relate to. The concept of young people's relationship with science has numerous dimensions which can be studied. In order to be able to provide practice-oriented advice for science education, the focus here is on (1) *points of contact* – that is, young people's *access* to science; and (2) *individual meaning* – that is, the *individual importance* of science in young people's lives. The number of available current studies on these dimensions in Germany is limited, that is why, from the current point of view, a specific data collection is planned.

Another dimension of interest is *trust in science*. Trust plays a particularly important role in connection with scientifically legitimized public policies on societal crises. Like other individual dimensions of the relationship, *trust in science* is often surveyed in connection with population surveys or in the context of *epistemic trust in science*. Through the numerous studies measuring trust, secondary data analysis of those is recommended (for instance of the annual German 'Wissenschaftsbarometer' study by the German organization *Wissenschaft im Dialog*). It should be mentioned at this point that consideration of secondary data analysis is often advisable in principle, but in the context of international research, the comparability of different studies and measurement instruments (for example in different languages) must be examined. In addition to that, the secondary analysis can be supplemented by self-conducted surveys, if necessary. For this purpose, established measurement tools, such as the OECD Guidelines on Measuring Trust (2017), can be found for application to *trust in scienc*e.

To summarize, in order to be able to answer the research question, it is necessary to clarify how young people define science, what they associate with it, how their relationship with science is characterized, and how important science is to them. Since there are no current open-ended in-depth studies on these issues in Germany, an exploratory empirical research approach was chosen. This is why this study design starts with a qualitative pre-study on these subordinate research questions.

Qualitative pre-study. The qualitative part was selected to be the first, but not the main, part of a sequential mixed methods design (Figure 4.1). Its primary purpose is to obtain first impressions of the research field, the relevant research questions, and the hypotheses to be used for the subsequent quantitative main section, as well as the development of the measuring tool to be employed. Inspired by the DAST, the participants will first be asked to create a mind map (cp., for example, Wheeldon & Faubert 2009) for which only the word 'science' is given as a starting point. These mind maps therefore allow an initially very open-ended, low-influenced exploration of young people's associations with the concept of *science*. Guided interviews will also be conducted to ensure that the three dimensions described above – (1) the subjective understanding of science; (2) the points of contact and access to science; and (3) the subjective meaning of science – are also investigated, and that a conversational framework is provided. With regard to the exemplary research interest, the qualitative data will be analyzed using a qualitative content analysis based on Mayring (1990) that aims to build categories and, in the case of this study, in addition – where applicable – typologies. Participant recruitment will begin with a sampling plan that is refined and adjusted as the research progresses. The strategy here is to obtain the greatest variation in potentially influential variables such as gender, age, and educational background. This qualitative pre-study will create the basis for developing hypotheses about correlations and typologies that can be tested during the quantitative study. In the following step, the results and insights from the qualitative section will be used to apply a specific focus to the main study and to develop an appropriate questionnaire that will lead to generalizable results.

Quantitative study. The subsequent quantitative part has the purpose of finding generalizable descriptive results of the relationship of young people with science, identifying

influential variables, and trying to develop or confirm a typology (Figure 4.1). The main questions of interest here are what 'types' of relationship with science can be distinguished, what their typical characteristics are, and how common these types are. A standardized questionnaire will therefore be developed, and the results will be analyzed using a variety of statistical methods – for example, a cluster analysis or a latent class analysis, depending on the results of the qualitative pre-study. This quantitative segment is intended to become the main part of the research, with the aim of acquiring general information about how young people relate to science, on the one hand, and of offering concrete proposals for improving it to educational professionals such as teachers and educators on the other.

Figure 4.1: *Mixed methods study design*
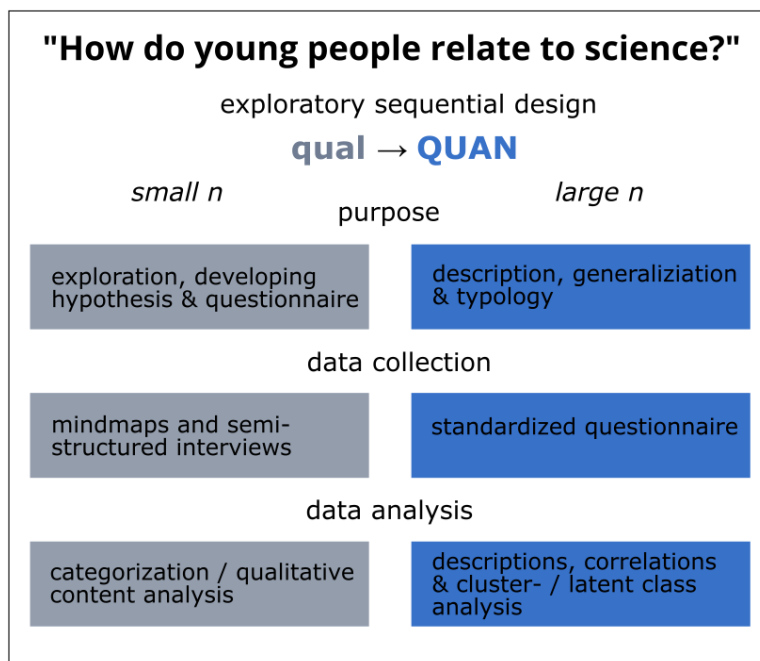
Source: Author's own figure based on Creswell & Clark 2017, pp. 59ff.

Mixed Methods. To sum up, this study can be categorized as *mixed methods research* (MMR), which Leech and Onwuegbuzie (2009) define as "research that involves collecting, analyzing, and interpreting quantitative and qualitative data in a single study or in a series of studies that investigate the same underlying phenomenon" (*ibid.*, p. 267). In their book, Creswell and Clark explain the different purposes and effects of various 'core' MMR types (cp. Creswell & Clark 2017, pp. 65ff.). One of these types is the *exploratory sequential design* chosen here. In particular, the intended exploratory nature of the study design is a result of the sequential use of the methods in connection with the initial use of an open qualitative research method. The advantage of MMR designs in general, is that each part stands on its own but elements of both parts can be joined together to provide an additional benefit (cp. Ahram 2013, p. 283). This is shown, on the one hand, by the fact that the pre-study is used to develop the main quantitative instrument, and, on the other, by the fact that overall study design includes a third step called the 'merging phase' in which the results of both parts of the study – the qualitative pre-study and the quantitative main study – are combined to provide an overall

view of the main research question – *how do young people relate to science?* – from different methodical approaches and perspectives on the other. In addition, information will also be provided on what influences prevail and where there is potential for improvement. This will lead to practical recommendations for educational science and science communication.

Discussion

The study design described here is an example of the use of MMR designs in research on young people. To be noted, however, is that the study presented here only refers to research on the situation of young people in Germany. Nevertheless, the methodological advantages and challenges explained here can also be applied to international comparative research to a certain extent. The most important, and probably most frequently applicable, case is a discussion of the definition and operationalization of 'youth' or 'young people'. International study designs should consider different cultural, subject-specific, and (research-)traditional definitions and find a comparable compromise that fits their own research question. Practical methodological advice for comparative youth research can be derived from the use of mind maps to explore young people's cognitive schemes. Further research on this method is necessary, however, given that a general application would probably only be possible from a certain age or developmental stage of children and adolescents, and application in international comparisons would probably be biased by cultural influences. As soon as the PhD project has been completed, any findings based around the use of mind maps will be shared.

This exemplary study also illustrates why exploratory sequential MMR designs are suitable for in-depth examination of less explored specific and extensive topics and for identifying concrete starting points for quantitative research. As far as MMR designs are concerned, there are both advantages and difficulties in their application. Ahram (2013) called typical faults 'mechanism muddling' and 'conceptual slippage' (cp. ibid., pp. 282-288). It is important to be aware of these potential fallacies, such as the use of inconsistent concepts and dimensions. Both the case selection and the conceptualization as a whole need to be at least appropriate to the entire study design. Overall, however, the exploratory sequential design outlined above is not as prone to inconsistencies as for example explanatory or non-sequential MMRs are. Each of the two different methodological parts are stand-alone studies with usable results; however, in order to yield comparable and connectable results, it is necessary to be aware of and to reflect on the possible inconsistencies.

All things considered, the advantages of MMR designs prevail over the disadvantages. Especially in the case of less explored research fields, MMR designs can be useful for exploring a particular field extensively. In regard to the research question 'how do young people relate to science?', qualitative and quantitative methods of empirical social research are used to become familiar with the field, build hypotheses, develop a measurement tool, and compare the results from different perspectives: "Whereas the advantages of qualitative methods are the detailed descriptive study and the discovery of new social phenomena that the researcher has not been aware of, the advantage of quantitative methods is the validation of the

empirical scope of the theoretical model and of relevant variables" (Goerres & Prinzen 2010, p. 416).

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CHAPTER 5

EXPLORING POSITIVE AND NORMATIVE BELIEFS ABOUT RECRUITMENT AT UNIVERSITY: A QUALI-QUANTITATIVE ANALYSIS ON EARLY CAREER RESEARCHERS

Arianna Santero, University of Turin, Italy
Cristina Solera, University of Turin, Italy

Highlights

- It is interesting to explore the beliefs of junior researchers about how entry into academia works and should work, because beliefs shape individual behaviors, organizational cultures, and inequalities. But empirical and methodological studies on this issue are rare.

- Combining GEA and MindtheGEP quali-quantitative data, this paper shows that positive and normative beliefs can be properly captured by the use of a mix of quantitative and qualitative methodologies – a mix able to determine how they are formed and framed across cohorts, genders, research fields, and academic positions.

- We identified the following five main advantages of using a mixed methods exploratory sequential research design to gain better understanding of the situation of young people working at universities, and in particular to investigate the beliefs of junior researchers about recruitment in academia: 1) integrating the findings of previous quantitative and qualitative studies; 2) using the results of the qualitative empirical exploration to define the quantitative questionnaires; 3) testing the generalization of qualitative results with quantitative data; 4) improving transparency (intersubjectivity), replicability (explaining the assumptions and discussing the sampling method and the interview guide) and validity (triangulation); 5) improving interpretation.

- Empirical evidence on what counts and should count in obtaining a permanent post within precarious Italian academia shows that a mix of 'old' and 'new' criteria and rhetorics coexist. In young researchers' views, without gender differences, 'meritocracy' (i.e. internalization and publications) counts a great deal, and it is perceived as fair. Yet also 'bureaucracy' and 'loyalty' (namely internal and external networking, relationships, the role of the supervisor), in contrast with senior researchers' views, also count a great deal – indeed too much. This suggests that young researchers feel entrapped by the logic of 'publish or perish', of being unconditional workers (the 'new') and at the same time by the logic of having a strong internal sponsor ('the old'). Internationalization and soft skills should count more, amid less precarious paths and prospects.

Introduction

In the context of the increasing precarity of early academic careers (Murgia & Poggio, 2019; Ivancheva et al., 2019), of persistent gender inequalities (Picardi, 2020; European Commission, 2021), and of the emergence of the 'neoliberal academia' based on the meritocratic ideal (Van den Brink & Benshop, 2011; Boarelli, 2019; Jenkins et al., 2022), it is interesting to explore the beliefs of junior researchers about how entry into academia works and should work. In fact, both positive and normative beliefs shape individual choices and coping strategies in a person's life course (Hitlin & Johnson, 2015; Pennartz & Niehof, 2019). They also have an impact on organizational cultures and change (Nystrom & Starbuck, 1984) and on macro-outcomes such as inequalities (Cornali & Saracino, 2011). In this paper, we argue that such beliefs can be properly captured by using a mix of quantitative and qualitative methodologies – a mix able to determine how they are formed and framed and whether they differ among genders, disciplines or academic positions.

Qualitative studies in Europe show that recruitment, retention and career advancement practices are the result of beliefs that are multiple and potentially incoherent. In particular, beliefs about "meritocracy, bureaucracy and loyalty do not always pull in the same direction" (Henningsson & Geschwind, 2022). For example, although beliefs about meritocracy and equality are rooted in the "pervasive narrative of excellence" (Moore et al., 2017), there are numerous definitions, criteria and methods with which to assess 'excellence' in recruitment and career advancement (Brusoni et al., 2014), as well as the accountability of the results of teaching and learning (Drittich, 2014) and the ranking of institutions (Froumin & Lisyutkin, 2015). Indeed, as well argued by Gaiasci (2021a, 2021b), the emergence of the neoliberal academia (Connell, 2015) based on the 'new' standards of excellence and the meritocratic ideal co-exists with practices based on the 'old' affiliation and cooption. However, the emphasis on meritocracy makes these still existing old practices more overt, so that the range of possibilities at the basis of individual merit, including organizational dynamics, are overlooked. Moreover, as well documented (Génova & de la Vara, 2019; Moore et al., 2017), the spread of the meritocratic ideal has increased the pressure to publish, with a 'publish or perish' rule that generates stress and trade-offs within young researchers' academic and personal lives (making private transitions, such as the one to parenthood, and work-family reconciliation very difficult, especially for women; Baker, 2012; Ferree & Zippel, 2015; Reuter, 2018).

While the spread of precariousness and the persisting gender gaps in recruitment, career advancement, and work-life balance are well-documented, less so are the positive and normative beliefs of young women and men about how a university career works, especially with a mixed-methods approach (Woolley, 2009). This paper addresses these challenges in order to deepen the discussion on how to combine methods to study youth from a comparative and policy-oriented perspective.

Research questions and methodology

The case of junior researchers in Italian academia

By drawing on two research projects on gender asymmetries in academia, and by focusing on the beliefs of junior researchers, this paper uses a mixed method and considers Italy as an interesting case study. Italy is of particular interest because of the comparatively recent 'neo-liberal turn' involving public universities and the long period required to obtain a permanent appointment. With the so-called Gelmini Law (L. 30 December 2010, n. 240) the post of the assistant professor has become temporary. Coupled with the 2007-2017 cut in turnover, this has restricted the access to tenured posts. Moreover, the emergence, since the mid-2000s, of systems for the evaluation of performance (of individuals and organizations) coupled with an increasing reliance on competitive funds (due to scarce resources) has promoted a new managerial academic culture based on hyper-productivity and entrepreneurship (Gaiaschi, 2021a 2021b). The criteria and practices for recruitment and promotion in Italian universities have indeed shifted in recent years towards research-oriented and meritocratic approaches, changing the incentives of researchers and professors (Checchi, De Fraja & Verzillo, 2021). Yet gender asymmetries in academia persist (Picardi, 2020; Solera & Musumeci, 2017; Carriero & Naldini, 2022; Gaiaschi, 2022), and it is interesting to know how young women and men account for their career trajectories, difficulties, and the functioning of the university system.

This paper discusses how qualitative and quantitative methods can be combined to learn about the beliefs of junior researchers. It does so by focusing on the challenges and potential of promoting inclusive mixed-methods research practices. In particular, the paper addresses the following issues:

- *How quantitative and qualitative methodologies can be combined* to gain better understanding of the situation of junior researchers working in universities, and in particular their positive and normative beliefs about recruitment in academia.

- The main empirical contributions yielded by the *application of different methodologies* to study young researchers' beliefs.

The empirical base of the paper is a multi-method study carried out within the wider research project GEA (*Gendering Academia,* **www.pringea.it**) on gender inequalities in Italian academia. This is a PRIN (Project of Relevant National Interest), funded by the Italian Ministry of Education and coordinated by Manuela Naldini, undertaken in collaboration with the H2020 comparative project MindTheGeps *(Modifying Institutions by Developing Gender Equality Plans,* **https://mindthegeps.eu**) on the implementation of Gender Equality Plans in 7 European universities and research centers coordinated by Cristina Solera. In regard to these projects, for this paper we explored the positive and normative beliefs about recruitment expressed by junior researchers working in an Italian university.

Defining 'young researchers' is not easy in the Italian case. Because of the aforementioned precarious processes of the early stages of the academic career and the prolonged period required by Law 240/2010 to reach a tenure track position, the age of researchers with fixed-term contracts can be, with differences among disciplinary sectors and between genders,

even over 35 years old. At the time of writing this article, a legislative reform is underway on the early stages of an academic career in Italy, but there are still no visible effects on careers. For the purposes of this paper, since we focus on early academic career positions in order to explore beliefs about recruitment and access to tenure track positions, we consider 'junior researchers' as post-doc research fellows with fixed-term contracts (including so-called type A fixed-term researchers).

Combining quantitative and qualitative methodologies

Our combination of quali-quantitative methods followed a pragmatic approach (Felizer, 2010) to make it possible to explore under-investigated issues, such as those concerning positive and normative beliefs. Moreover, we adopted a triangulation mixed method approach because it is fruitful in public policy-oriented research (Tzagkarakis & Kritas, 2022). In fact, the research design involved an exploratory sequential design using multilevel samples for the qualitative and quantitative components of the study (Onwuegbuzie & Collins, 2007). This research design makes it possible to integrate the findings of previous quantitative and qualitative studies, as well as to use the results of qualitative empirical exploration to define the quantitative questionnaires. Moreover, it makes it possible to test the generalization of qualitative results with quantitative data. It also relies on and reinforces agency by involving groups of (socially marginalized) young people whose voice is little recognized and heeded (Baird *et al.,* 2021).

In the first phase, *a quali-quantitative survey* of the extant literature on academic careers and gender inequalities was conducted. Then, on the basis of the results of previous studies, *the qualitative* tracks were developed, and the interviews were performed and analyzed to explore narratives and experiences regarding academic careers. The semi-structured interviews were organized into 6 thematic sections: the interviewee's academic career; everyday working life and characteristics of current job; organizational cultures (current and previous); wellbeing and work-life balance; perception of current position and satisfaction; future prospects and expectations on public policy. The qualitative interview guide was discussed and pre-tested in the quali-quantitative research group across all the GEA partners. The discussion of the interview guide first, and then of the questionnaire for the survey, improved transparency (intersubjectivity) and replicability (by making explicit the theoretical assumptions and the empirical challenges and potentialities of the interview/survey guide and of the sampling strategies).

The qualitative data were collected from 16 in-depth semi-structured interviews conducted online in 2020-2021 with early career researchers. All the participants had temporary contracts as post-doc research fellows at the time of the interview. The participants were selected from the complete list of the population, by department and gender (8 researchers respectively working in a STEM and in an SSH department, 4 men and 4 women for each) and, in order to maximize the heterogeneity of experiences and narratives, also by age, academic seniority and household, according to information gathered with the support of key informants and a snowball technique. The departments were selected for having different STEM and SSH disciplines, and a percentage of women in the academic staff at different career levels similar to others in Italy with the same scientific sectors. Preliminary qualitative

content analysis on representations, discourses, everyday practices and career strategies was carried out using the qualitative Atlas.ti software. For this paper, we focused on the answers to the questions: "*How did your recruitment take place? What were the recruitment criteria?*"; "*What characteristics do people considered excellent in the Department have?*" and "*What are the evaluation criteria of your work, what activities are considered necessary or important in your sector to build a career?*", as well as on narratives and descriptions of positive and normative beliefs that emerged from other parts of the semi-structured interviews.

The themes emerging from pre-test and the first qualitative interviews were discussed in the research group to define the *quantitative questionnaire* for a web survey conducted in 2021 on all academic staff (of some Italian universities, of different size and geographical location) tenured or otherwise, with a total response rate of 15.48%, which was relatively low but in line with those of surveys conducted in academia. Here, in particular we focus on a big university in the north of Italy, for a total of 600 respondents (of whom 175 were early career researchers). In addition to questions on the timing of crucial transitions within the academic career and on current job and working life, we introduced – to our knowledge, for the first time in a web survey on academics – two 13-item scales concerning positive and normative beliefs about obtaining the first tenured post in the respondents' university. Positive beliefs referred to what factors the respondents believed to count in gaining a stable position, normative beliefs are about what should count. Factors to be given importance concerned four areas: '*excellence*' (publishing frequently, in high impact journals, obtaining grants); *internal network* (strong sponsor within the department; previous collaborations with the department); *external network* (significant research experiences abroad; PhD from another university; belonging to extensive and academically strong research networks); the *unconditional worker model* (taking responsibility for bureaucracy and administration tasks); strong dedication to dissemination activities; always putting work first.

The qualitative and quantitative analyses for this paper were carried out in parallel with improving the validity of the study (triangulation) and the interpretation of the results.

Results

Views on how university and research work

Most of the interviewees in the qualitative research phase explained that they had obtained the contract as a research fellow or assistant professor that they had at the time of the interview in an organizational context with which they were already working. However, the most important factor for academic recruitment cited by the interviewees concerned the number and type of publications.

> *This is the standard recruitment for a type A or type B researcher, so you have to submit qualifications, publications... and then there is the interview. So... I do not seem to have done anything else. I have the national scientific qualification as an associate professor obtained two years ago... it is the standard practice; it is not that we have done particular things. [...] the competition is an objective competition (Nora, F, 38, STEM, assistant professor).*

The belief about the importance of publications was widespread among women and men, and in SSH and STEM fields of studies. In STEM, the participants also mentioned bibliometric parameters on publication records as being crucial, as well as international mobility and visibility/presentialism.

> *The thing that then counts is the extent to which one is willing to move more or less anywhere (Salvatore, M, 28, STEM, research fellow).*

The internationalization of research groups and (internal and external) networks was also mentioned, especially in STEM, while in SSH it was presented as an increasingly important criterion. Some research fellows also mentioned the coexistence of formal and informal criteria.

> *From a… formal point of view, certainly, there are various kinds of, let's say, prizes for research activities, recognition. But this is something very recent, only in the last few years. From an informal point of view, on the other hand, I believe that those who manage… manage relationships, both within the department and between the department and the outside, are more valued (Nina, 42, SSH, research fellow).*

> *Formally [the standard conversation with candidates for academic recruitment who have worked in different universities and research groups is]: "ah how nice, you have traveled a lot", but then substantively... often the academic world is built like… Someone who puts himself under the wing of someone (Carmen, 35, SSH, research fellow).*

Participation in conventions or conferences and membership of the editorial committees of journals were also cited, but they are perceived as less central, especially in STEM. The so called "Third Mission", terms used to define all the additional functions of the universities (excluding teaching and research) to generate knowledge outside academic environments to the benefit of the social, cultural and economic development, were considered less central for recruitment. Interestingly, these beliefs seem to be quite established and consistent among both men and women and in the various disciplines.

The results from the web survey were similar. As Figure 5.1 above shows, for early career researchers what was deemed most valuable for gaining a stable position was a combination of 'meritocratic' and 'sponsorial' factors: more than 70% of early researchers thought that publishing frequently and in high-impact journals counted a great deal, followed by having a strong sponsor within the department and being an internal candidate (around 60% replied that these factors counted a great deal or a very great deal). These views of these early career researchers differed sharply from those of the late career ones: for the latter the 'internal advantage' weighed less (around 50%). Moreover, also putting work always first was more often considered important by early career respondents (50%) than late career ones (35%), signalling the pressure felt by the former to comply with the unconditional worker model.

Figure 5.1 *The importance of factors that count and should count to obtain a stable post: shares of early career researchers (left) and stable researchers and professors (right) declaring them to be of "much" or "very much" importance*
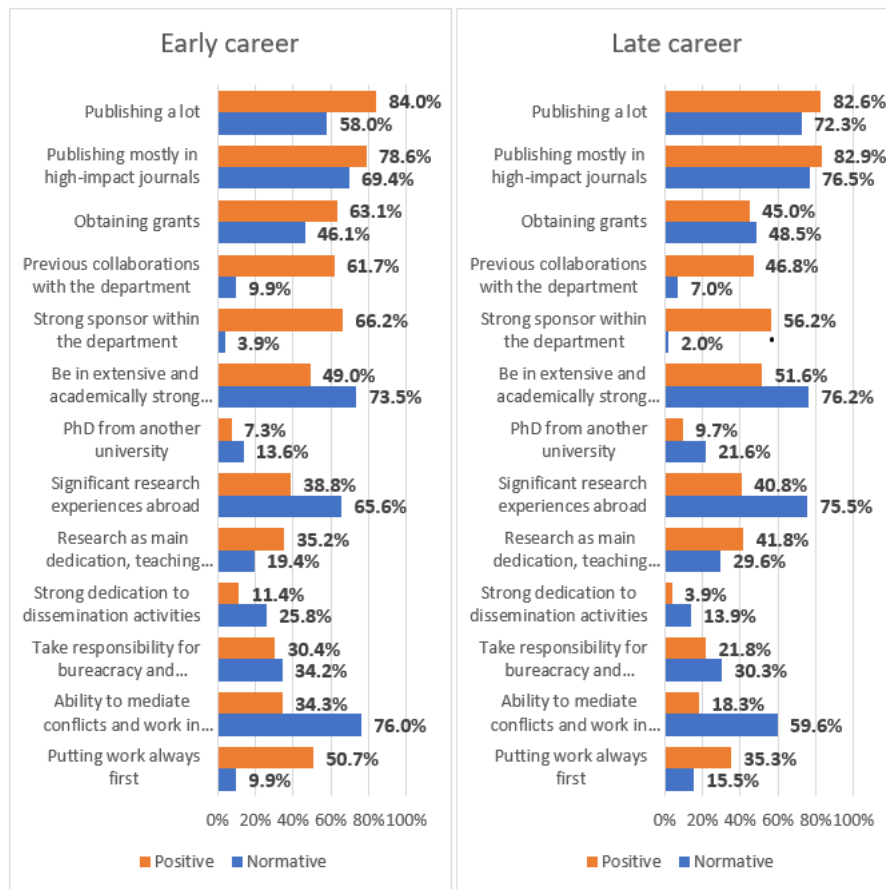
*Views on how university and research should work*

In light of the qualitative exploration, participation in international research projects should be considered important especially in STEM, while teaching is considered an under-estimated criterion (that should count more), especially in SSH. From the interviews there also emerged the crucial role of the supervisor and his/her mentoring style in extending (or not) the research network, which is another important factor in pursuing an academic career (but which should count less). There was also criticism regarding the role of the mentor, who, due to his/her individual discretion or inclination, can greatly influence the academic career of a younger researcher. One of the proposals that emerged from the interviews was to create or increase open calls for funding targeted on young researchers' networking and international mobility.

Together with criticism of the still excessively influential role of affiliation and cooption, It is interesting to note that widespread skepticism was also expressed concerning the emphasis on 'productivity'. Indeed, this was seen as an unfair 'cohort burden': career criteria on publication records shifted *"higher and higher"* were described as "*inhumane*" and "*unsustainable*" (Marco, M, 37, STEM). Moreover, both men and women in STEM and SSH

reported that the oldest cohort of researchers was not used to coping with such quantitative criteria:

Once with a book you got a professorship and I wrote a book for a research fellowship (Carmen, 35, F, research fellow).

Figure 5.2 *The importance of factors that count and should count to obtain a stable post: shares of early career researchers (left) and stable researchers and professors (right) declaring them to be of "much" or "very much") importance divided by scientific area*
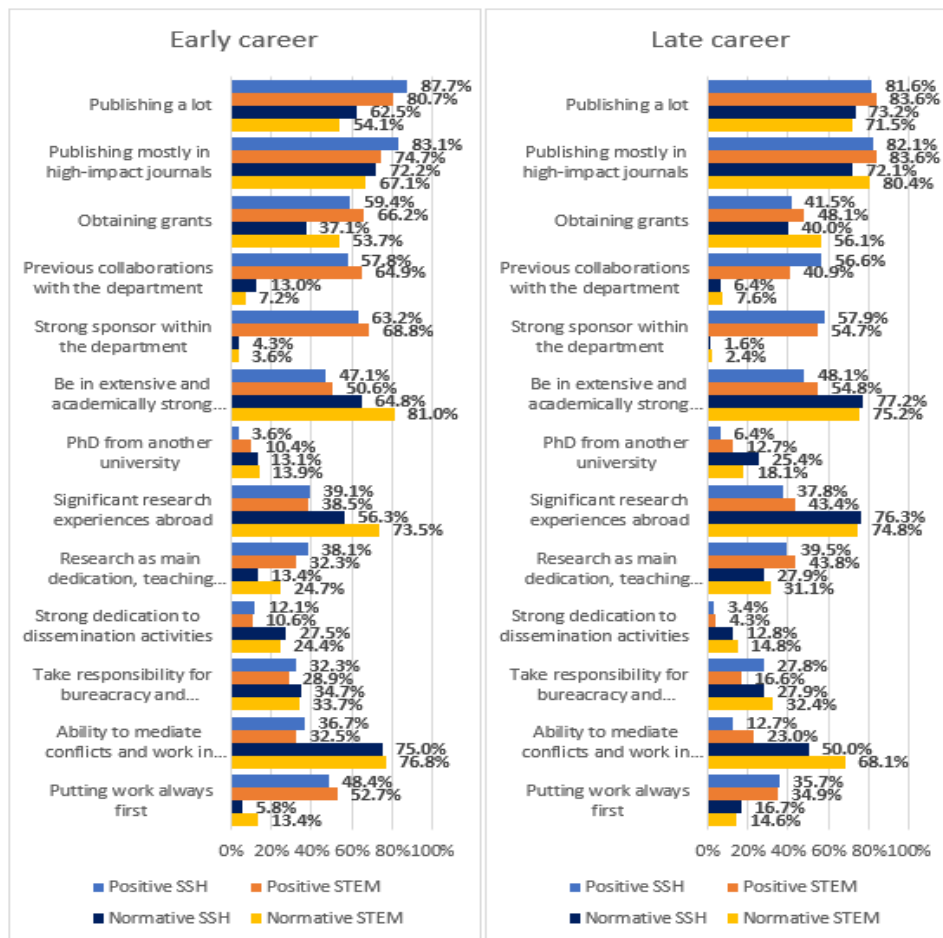
These beliefs concerning the 'publish or perish' criterion was presented as challenging not only for the junior researchers' work-life balance, but also for gender equality. This was especially the case of female researchers who become mothers. They were related to beliefs about a 'childless career as a genderless career', and they were also considered challenging for the quality of research. The participants who expressed a strong orientation towards the 'publish or perish' belief, also tended to express criticism of it, due to the consequent high work-related stress.

It also emerged from the web survey that for early career researchers, unlike late career ones, 'publish or perish' should not be the prevalent mechanism: for 58% publishing frequently should be important; for 46% obtaining a grant should be. Having a strong internal sponsor

should not matter at all, as for late career researchers. Internationalization and soft skills should count more for both early and late career academics.

As Figure 5.2 shows, no major differences emerged between STEMM and SSH, except that internationalization should matter more for STEMM young researchers than for SSH young researchers. Further analyses divided by gender showed that there were no differences between men's and women's views. What really mattered was the early career vs. late career divide.

Discussion & Conclusion

By explicitly referring to a mixed-methods exploratory sequential research design, and by using one concrete example of a study on an Italian university, in this paper we have shown how mixed-methods approaches can contribute to knowledge on academic careers and young researchers' beliefs.

Despite the rhetoric about the spread and positivity of meritocracy, and on the 'new academia' that is ousting the 'old' academia based on cooption and producing an equal and excellent university (Gaiaschi 2021a, 2021b), young researchers point out that several other dimensions and criteria are used in recruitment processes. In particular, informal aspects continue to matter, even if they are not formally recognized, such as the role of networking and of supervisors. The adherence to the meritocratic ideal is also problematized: 'publish or perish' generates stress, competition among friends, and personal dilemmas (such as postponement of parenthood). As emphasized in the literature (Moore et al., 2017), the rhetoric of excellence may also legitimize the allocation of prestige and economic resources: combined with 'narratives of scarcity and competition', it may increase 'internal impositions' promoting 'hyper-competition' rather than 'good research'.

Beliefs are seldom studied using a mixed-methods approach, and especially a sequential design. This article provides an example of how the integration of quali-quantitative data 'from the cradle to the grave' (during research design, definition of questions, sampling, definition of interviews and questionnaire, until the analyses) is very fruitful. There are indeed five main advantages of using a mixed-methods exploratory sequential research design to gain better understanding of the situation of young people working at university, and in particular to investigate the beliefs of junior researchers about recruitment in academia.

The first advantage derives from integrating the perspectives emerging from previous quantitative and qualitative studies. Since this is a rather under-investigated issue, such integration has made it possible to expand the background of this study. The second advantage that the results of the qualitative empirical exploration can be used to define the quantitative questionnaires. This sequential design has the advantage of including unexpected issues, improving the wording of the questions, and making the qualitative and quantitative data collected highly comparable. The third benefit of the quali-quantitative method is that it makes it possible to test the generalization of qualitative results with quantitative data, across genders, employment positions, and sectors. Moreover, mixed-methods make it possible to improve

transparency (intersubjectivity), replicability (explaining the assumptions and discussing the sampling procedure, and the interview guide), and validity (triangulation).

Finally, a quali-quantitative approach improves the interpretation of how positive and normative beliefs about career recruitment are formed and framed among different cohorts of researchers that face dilemmas and choices in specific legislative, policy and economic settings. We found scant variation among gender and research fields but significant differences among cohorts/academic positions, showing that institutional academic changes, such as precarisation, work intensification and the meritocratic ideal, seem to have an impact especially on junior researchers. Senior researchers – those that are in the decision-making bodies for recruitment and career progression – seem to gainsay the role of the 'old' affiliation and cooption system and to poorly recognize the disadvantages and fatigue – strongest for the younger cohorts and early careers - of the "publish or perish" imperative. The causes and mechanisms behind these gaps between early and late career researchers, as well as their gendered profiles, should be the topics of future quali-quantitative studies.

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CHAPTER 6

INSIGHTS AND PITFALLS: 5 MUST-DO'S FOR LARGE-SCALE COMPARATIVE QUALITATIVE RESEARCH

Sonia Bertolini, Universityy of Turin, Italy
Marge Unt, University of Tallinn, Estonia

Highlights

- The chapter is based on methodological reflections from three qualitative cross-national research projects: EXCEPT[1], EUROSHIP and TRANSPARENT.

- The chapter contributes to the discussion about the importance of a qualitative approach in cross-national comparisons and its place in the domain of comparative research.

- It highlights the unique capacity of such an approach to enable the scrutiny from within of societies and their specific features, and from the perspective of an active agent recognizing the cultural, institutional and social contexts.

- Moreover, the chapter also draws attention to some specific problems and challenges concerning comparative qualitative research.

Introduction

In this paper we seek to contribute to the discussion on the importance of a qualitative approach when conducting cross-national comparisons and its place in the domain of comparative research.

The idea starts from the fact that, even if qualitative comparative research is not particularly common, and not a lot of reflection had been conducted on it, comparative qualitative methodology has a unique capacity to enable the scrutiny from within of societies and their specific features, and from the perspective of an active agent bounded by cultural, institutional and social contexts. In this way, it makes it possible to link the macro context to the micro level of the agency of the actor. The choices of actors depend on the opportunities available, and the constraints imposed, by the specific institutional context of each country.

The literature does not contain a great deal of reflection on this methodology and even we missed guideline for this type of studies. In this paper, we will direct attention to some specific problems and challenges concerning comparative qualitative research. In particular, we

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[1] Except-project.eu

intend to investigate first what kinds of research questions can be resolved by means of qualitive comparative analyses.

An important issue is how the comparability of qualitative data can be guaranteed. In fact, because samples in qualitative research are not representative of the population, the process of sample selection is important.

A second important issue is how to establish and standardize the procedure with which to analyze comparative qualitative data, considering the difficulties caused by specific factors such as linguistic differences.

We will address these issues by citing three qualitative comparative cross-national projects[2] adopting different strategies with which to collect and analyze data.

1. Research questions

The first issue is what kinds of research questions can be resolved by means of qualitive comparative analyses. Here the point is why should one choose this methodology? In what situation?

We start from the examples of the three above-mentioned projects: For example, in the EXCEPT project the research question was how to provide a comprehensive understanding of the consequences of youth labour-market vulnerability in regard to risks of social exclusion in Europe. It was a mixed-method project. One of the questions investigated using the qualitative comparative method was how young people today gain autonomy in different institutional contexts, and if this is a step still central in the process of becoming autonomous. In EUROSHIP the research aim was to examine how people with low educations and incomes perceive the quality of jobs early in their careers, their aspirations, capabilities and coping strategies to exit low-quality jobs and in-work poverty. In TRANSPARENT the research aim was to analyze the transition to parenthood in different institutional contexts.

In all three European projects there were the same research questions, in different institutional contexts. All the research questions were about the social mechanisms driving socio-economic phenomena. In particular, they rise the point on how and why these phenomena occur.

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[2] EXCEPT, Social Exclusion of Youth in Europe: Cumulative Disadvantage, Coping Strategies, Effective Policies and Transfer H2020

PI: Marge Unt (Tallin Univ.), Michael Gebel (Bamberg Univ.); Countries: Bulgaria, Estonia, Germany, Greece, Italy, Poland, Sweden, the Ukraine and the UK.

EUROSHIP, Closing gaps in social citizenship:
New tools to foster social resilience in Europe H2020

PI: Rune Halvorsen (OsloMet); Countries: Estonia, Germany, Hungary, Italy, Norway, Spain, the UK

TRANSPARENT, International research cooperation to study the transition to adulthood:

Coordinators: Daniela Grunow, Marie Evertsson; Countries: the Netherlands, Sweden, Germany, Switzerland, Spain, Italy, Poland and the Czech Republic

The qualitative comparative method considers the perceptions, aspirations, capabilities, coping strategies, and decision processes of similar people living in different contexts.

2. How can the comparability of qualitative data be guaranteed?

Designing qualitative comparative analyses requires reflection on:

- Standardizing the qualitative process of analysis

- Ensuring replicability of the collection of data

- Ensuring replicability of the analysis process

In the three comparative projects, the same tools – convergent but flexible – were used in the definition of an overall survey strategy: developing a sampling strategy; definition of guidelines for semi-structured interviews; implementation and coordination of the qualitative survey in all project countries.

The first point of attention is the process of sample selection. It is important to choose criteria that can ensure the similarity of the different national samples. This is not always obvious because different characteristics of countries may have an influence. For example, in the EXCEPT project we needed to select a sample of youths in each country at risk of social exclusion. The first problem was how to define 'youth' on the basis of age, in relation to housing autonomy, because the ages at which young people leave home are very different in Europe. This is the first kind of problem that may arise when defining the sample, let's call structural problems diversity.

Figure 6.1   *Sampling of the three projects*

SAMPLING PLANS

EXCEPT

- Countries: Estonia, Germany, Greece, Italy, Sweden, Uk, Bulgaria, Poland Ukraine.

- 384 semistructured interviews to young people aged 18-30, A gender balanced sample, included temporary workers, unemployed people, NEET and not contractual workers (also some successful stories).

EUROSHIP

- Countries: Estonia, Norway, Germany, Spain, Hungary, Italy the UK

- 210 interviews from three different age groups (born around 1945-1950, 1975-1980 and 1990-1995).

- A gender balanced sample and different backgrounds with regard to care obligations and needs, disability and ethnicity – keeping in mind intersectionality.

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Figure 6.1   *Sampling of the three projects (contd.)*

SAMPLING PLANS

TRANSPARENT

- Countries: Sweden, Switzerland, western Germany, the Netherlands, Italy, Spain, the Czech Republic, and Poland.

- 155 interviews with pregnant women and fathers-to-be about their past as well as their plans regarding gendered divisions of child care tasks, leave taking, employment interruptions, working time adjustments, and use of daycare.
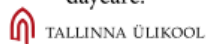
TRANSPARENT longitudinal

- Follow up 1: the same sample

- Interviews with child 1-y-o

- 334 interviews

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Moreover, we needed to define the notion of 'at risk of social exclusion' in the various countries. Because of the different labour market regulations and the different economic situations of the countries concerned, this definition could assume different forms. Risk groups are not the same in all countries. For example, highly-educated young people in Germany are not at risk, but they could be in Greece and Italy.

In this case, to resolve the difficulty, quantitative data were used. A preliminary analysis using comparative quantitative data enabled the researchers to identify more precisely the characteristics of youth at risk of social exclusion, taking into account the distinctive features of each country. In this way, the researchers built a common but flexible sampling plan. Each national research team adapted the sampling criteria (age, type of contract, educational level, etc.) to the specific country situation. Specific risk groups identified could be inserted (NEETs, immigrants, …) in each National Sampling Plan. Regarding the sampling criteria, TRANSPARENT is a good example of how to guarantee comparable samples: interviewing first-time working parents during late-pregnancy has a methodological advantage for cross-national research because it makes it possible to compare these couples at a similar and crucial stage of their life course. In this case, the variability is reduced because all the participants are faced with the same event. Of course, other variables – like the job sector or the level of education or the social class – could be more problematic.

In EUROSHIP, 210 interviews were conducted with respondents from three different age groups (born around 1945-1950, 1975-1980 and 1990-1995). The sample was identified with the criteria of a gender balanced sample and different backgrounds with regard to care obligations and needs, disability and ethnicity – keeping in mind intersectionality.

3. The process of comparative analysis

In this section we describe the tools used in the projects and the process of analysis to try to guarantee comparability and specificity uniqueness of the countries.

A first point of difference is that, while a standardized outline (semi-structured interview guide) and a standardized sample design (taking differences among countries into account) were used in all three projects, the process of analysis differed among them.

Table 6.1   *Comparative qualitative analyses in the three research projects*

EXCEPT	EUROSHIP	TRANSPARENT
Transcripts in national language	**Transcripts** in national language	**Transcripts** in national language
Codebook – main thematic, cross-thematic & qualifying codes predefined	–	–
Synopsis for each interview by main themes, predefined	**Synopsis** for each interview by main themes, predefined	**Synopsis** for each interview by main themes, not predefined
Country analysis by national teams based on analyses using coded interviews & synopses	–	**Country analysis** by national teams based on interviews & synopses, no predefined codes
Comparative report based on synopses & country analysis	**Comparative report** based on synopses	–

The first step in all the projects considered here was compilation of full transcripts of the interviews in the national language. In TRANSPARENT and EUROSHIP, the next step was to make a structured synopsis of the long in-depth interviews by condensing the rich material into summaries of up to 5 pages. Thus, the summaries were a first analytical step, where main themes by topics were summarized by the national researchers and illustrated with quotations from each interview. In EXCEPT, there was one further step before: the synopses.

The synopses along the thematic codes

The thematic codes were created by means of an analysis of the transcripts based on a predefined codebook. Overall, the codebook was very short, and its sole purpose was to ensure that the broad topics were covered systematically and the same questions were asked within each life domain. The common codebook outlined the three types of codes with which all interviews were analysed using NVIVO software: (i) the thematic codes along the main research topics; (ii) cross-thematic codes making it possible to ask the same questions within each life domain covered, like coping strategies, protective factors, risk factors and feelings;

(iii) qualifying codes like positive, negative or formal, informal. To be noted is that the standardized codebook prescribed the analysis on only a very general level by defining the very broad analysis schema allowing for country case flexibility in developing the codebook further. Thus, under each thematic and cross-thematic code, subcodes or additional codes were encouraged to create by national teams to capture the uniqueness of country cases. Also considered might be several iteration rounds of codebook development across countries, similarly to single country analysis (for details please look at: https://www.except-project.eu/files/filemanager/files/WP56_The_comparative_qualitative_research_methodol ogy_of_the_EXCEPT_project.pdf) in order to achieve the same code names for the same themes arising from the interviews. Without coordination of the further development of the codebook, the same sub-themes often arise in different contexts but are named in different ways.

However, the level of harmonization of the first steps of data analysis differed markedly among projects. Because EXCEPT and EUROSHIP aimed for comparative reports in the end, both strongly streamlined the data analysis because the synopses of all interviews followed the same structure for all institutional contexts. In this case, also topics less relevant to an individual case still got a short reflection. For instance, the role of public employment or any other agencies? might have been minimal for individual interviewees, but it was still outspoken in the synopses as an irrelevant coping mechanism. In this way, also the absence of topics, themes or coping mechanisms was outlined systematically across all interviews. Furthermore, in EXCEPT and EUROSHIP the synopses were translated into English, enabling cross-reading by other research teams and facilitating the conduct of comparative research. Within the TRANSPARENT projects, all teams also made synopses of each interview; but in accordance with the common overall project research aim, each team developed a synopsis structure based on their specific interests and topics emerging in the country context. The synopses of the TRANSPARENT project were written in the national language mainly for the national team's internal use.

Thus, there was a clear tradeoff between country level richness and the comparability of the data for the analysis. Because EXCEPT and EUROSHIP aimed to produce a comparative final report, they streamlined the analysis to allow comparison among the same topics and themes. The TRANSPARENT approach was less structured allowing more uniqueness of countries. The approach taken corresponded to the project's aim of having country-level chapters, and not of analyzing the same topics across countries comparatively.[3]

As the next analytical step and already as a research output, the single-country reports were written by national experts in EXCEPT and in TRANSPARENT. Country-level reports outlined the institutional context relevant to the research questions, and their empirical parts were based on synopses and analyses of original transcripts (for details please look at https://www.except-project.eu/wp3-78/ and http://www.transparent-project.com/**). This

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[3] Here and below we refer only to the overall process, and these projects are used as case studies in a simplified way to present the different approaches in comparative qualitative research. However, because these projects were huge undertakings and still have follow-up activities, we do not claim that our simplification of the analysis trajectory holds for all outputs of these three projects.

analytical step and its output made it possible to bring out the richness of a country case and yields valuable interpretation of results by country experts. Furthermore, it created the link between the individual agency and structure in a specific context, i.e. relating individual life courses to the overall macro contexts. However, in the case of EXCEPT the entire process was more standardized because also the structure of the country case analysis was based on a predefined codebook structure, which was not the case of the TRANSPARENT project, allowing for more flexibility in the country-level analysis.

Lastly, comparative reports were developed in EXCEPT and EUROSHIP, but not in TRANSPARENT. In EXCEPT, a great deal of attention was paid to the country-level interpretation by local experts. The bases of comparative reports were mainly national reports. In EUROSHIP, the bases of comparative reports were the synopses of single interviews, which optimized the process considerably, but at the cost of less country context-specific analysis.

Conclusions: strength and weakness of qualitative comparative analyses

The strength of this method is its capacity to look at processes and mechanisms, 'opening the black box' and giving voice to youth: in this way, young people become agents and can express their point of view.

The qualitative material collected required a sophisticated conceptual and methodological instrumentation to be analyzed and read (usefulness of synopses and codebooks) to incorporate national-specific institutional and cultural expertise and still reach a comparative view.

Attention to the tools, to be sure to compare similar cases. It requires careful interpretation, taking into account different levels of analyses and exhaustiveness of samples in terms of mechanism. A quantitative overview should define the context and refer to a representative sample of the population.

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CHAPTER 7

DROPPING OUT OR…CHERRY PICKING? A MULTI-METHOD APPROACH TO DROPOUTS IN ONLINE LEARNING

Valentina Goglio, University of Turin, Italy
Sonia Bertolini, University of Turin, Italy

Highlights

- This paper addresses the phenomenon of high dropout rates or, conversely, low completion rates in Massive Open Online Courses (MOOCs), which have been typically extremely high: according to Jordan (2015) and Reich (2014) only 2% to 10% of individuals who registered for a course actually earned a certificate of completion. This feature has been considered a structural weakness of MOOCs, questioning their sustainability and efficacy as resources for lifelong learning.

- This paper shows that a more thorough investigation of the phenomenon, involving both quantitative and qualitative data, evidences that the decision to drop out from a MOOC can have different meanings and can be qualitatively different depending on the individual characteristics of the individual learner.

- Using a mixed-method approach, based on mixed data collection and a sequential design which involved a first stage of survey data and a second stage of qualitative data from semi-structured interviews, this paper contributes to identifying different patterns of dropout, differentiating between the strategic selection of educational material and real dropout due to lack of motivation or abilities.

1. Introduction

Online courses are often promoted as a convenient and flexible form of lifelong learning for individuals who want to upgrade their skills in order to remain competitive in the labor market, as well as for new entrants who want to improve their labour market opportunities by investing in soft skills or in new ones. This stress on the continuous acquisition of skills by the workforce is a typical trait of the 4th Industrial Revolution, and it fosters public and private investments in various forms of lifelong learning. Among the several types of online courses that are currently available on the market, Massive Open Online Courses (MOOCs) have gained much popularity thanks to their low barriers (both economic and organizational) to entry and to their flexibility. Indeed, MOOCs take their name from the following characteristics (Stracke et al. 2019):

- Courses: focused on a specific subject, structured into several modules, planned to last for a specific length of time, encompassing lectures, assignments, and grades;

- Online: delivered on the Internet via digital platforms;

- Open: participation is available free-of-charge and without requiring a prior educational qualification;

- Massive: potentially accessible to huge numbers of people, as long as they have an Internet connection.

However, one of the main criticisms of MOOCs concerns the high attrition rates associated with such courses. In the early days of MOOCs, the strikingly high attrition rates of MOOC participants were seen as indicative of the failure of such courses (Ho et al. 2015; Margaryan, Bianco, and Littlejohn 2015; Reich 2014). According to Jordan (2015) and Reich (2014) only 2% to 10% of individuals who registered for a course actually earned a certificate of completion. Indeed, they were definitely not good signs for those who assigned to MOOCs the role of replacing higher education for the under-served (Agarwal 2013).

Empirical studies that have investigated the opportunities for access to, and completion of, these courses highlight that only a tiny minority of students have managed to finish the course with a certificate of completion. Moreover, the opportunities for completion are unequally distributed across social groups, with learners with disadvantaged socio-economic backgrounds being less likely to finish the courses. Other scholars have pointed out that MOOCs are not like all other in-presence courses delivered by traditional universities; therefore different metrics should be employed to measure success in MOOCs. Alternative ways to define 'success' in MOOCs have been proposed, and various profiles of learners have been identified to stress that different learners may attribute different motivations and goals to the same course. Several scholars have objected that the attainment of a certificate of completion as a measure of success in MOOCs may not have the same informative value that it has in the domain of traditional education (Evans, Baker, and Dee 2016; Evans and Baker 2016). Indeed, the open nature of MOOCs (or at least their low barriers to access) attracts multiple types of users, who enroll on MOOCs with motivations and expectations that differ from those of typical students in traditional higher education. Moreover, these motivations may also differ widely within the same group of learners, resulting in differentiated outcomes (Kizilcec, Piech, and Schneider 2013). Alternative metrics of 'success' – such as the cumulative grade obtained by the learner, or the percentage of videos watched and an associated threshold for achievement – may be considered more inclusive insofar as they include some groups excluded by a traditional definition based on the attainment of a certificate. Evans and Baker (2016) also warned that every definition of success has pros and cons and inevitably excludes (or includes) certain groups – a factor that institutions and researchers should bear in mind when using these metrics.

While consensus on alternative definitions and measurements of success in MOOCs has not yet been reached (Liyanagunawardena, Parslow, and Williams 2017; Rabin, Kalman, and Kalz 2019) and the degree of concern about this feature of MOOCs varies, in this paper we propose an alternative view of the multifaceted phenomenon of non-completion of MOOCs. We do so by exploiting the potential of combining quantitative and qualitative data in a complementary design where one type of data compensates for the weaknesses of the other (Small 2011).

The findings emerging from both quantitative and qualitative analysis provide a more composite account of how dropping out from MOOCs may be conceived from the perspective of learners, and they help to grasp the actual meanings and strategies of learners on courses of this type. Indeed, if these education and training resources are promoted and receive public investment as a form of lifelong learning, it is important to investigate what the potential and the limitations of such courses are.

2. Research questions and methodology

This paper aims to contribute to the investigation of the complex phenomenon of the high dropout rates of MOOCs from a methodological standpoint, focusing on the contribution that a mixed-method research design can make to the debate.

The research questions guiding the empirical analysis deal with the individual characteristics of learners who did not complete the courses, but also their motivations and attitudes in regard to this type of educational and training experience. More precisely, they ask:

> a) to what extent are the socio-economic characteristics of MOOCs learners associated with different chances of completion of MOOCs?

> b) what does the completion (or non-completion) of a MOOC represent for individual learners? Can the completion of a MOOC be defined as a measure of 'success'?

In order to answer these questions, the paper combines quantitative data coming from pre-course surveys and learning analytics related to two MOOCs with qualitative data coming from semi-structured interviews with learners enrolled on various MOOCs. The rationale for adopting a mixed-method research design resides in the nature itself of the phenomenon under study. Indeed, despite the impressive number of registered users around the globe, there is no single official source of statistical data that collects comprehensive information about courses, institutions at macro level, and information about learners at micro level. Most of the information about MOOC learners comes from survey data and learning analytics which are under the control of MOOC platforms, most of which, particularly if they are mainstream commercial platforms, do not release data publicly for research purposes. Moreover, research on MOOCs has been mainly conducted using quantitative data, in particular learning analytics (Deng, Benckendorff, and Gannaway 2019; Zhu, Sari, and Lee 2020). These are sets of data provided by online learning tracking systems focused on students and their learning behavior extracted from course management and student information systems (De Rosa 2017; van Barneveld, Arnold, and Campbell 2012). Besides serious implications in terms of profiling, privacy issues, and commercial exploitation of data (which fall outside the scope of this paper), from a methodological point of view this type of information may be rich in terms of quantity (i.e. number of users) but very poor in terms of quality (i.e. issues of noise, reliability, and coding). Additionally, some important socio-demographic aspects of the MOOCs experience remain uncovered by quantitative data and follow-up information, e.g. dropouts, returns to MOOCs, but also opinions and attitudes, can no longer be tracked on the

platform and several difficulties arise in reaching a dispersed population after the end of courses.

Based on these limitations, this study adopts a mixed-method design that leverages on the complementarity of various types of data, in the awareness that different types of data can provide different types of knowledge, and that the complementarity of these data can help to reach an encompassing and comprehensive understanding of the MOOC phenomenon in its complexity (Small 2011; Small 2017). The mixed data collection strategy includes quantitative data in the form of learning analytics and survey data to provide a general overview of the main trends on a large scale, and qualitative data obtained from semi-structured interviews with learners. Qualitative data help to bring out the plurality of the meanings and values attached to features of MOOCs, while quantitative data provide an overview of the regularities observed in the behavior of learners, very often coded in the form of binary variables. The traces left by learners in learning analytics – however sophisticated – do not reflect the multitude of strategies and feelings that learners attach to sensitive and much-debated issues (e.g. dropout, certificates, and completion); a complexity that qualitative data help understand.

More in detail, the quantitative data presented in this paper come from pre-course surveys and learning analytics on learners registered on two MOOCs delivered by Stanford University on its own MOOC platform called Lagunita[4] in 2016. These data have been integrated with 22 qualitative semi-structured interviews conducted in 2018 with MOOCs learners residing mainly in the USA (80%) recruited through informal channels such as Meetups, Facebook groups, and personal contacts, alternating snowball sampling with convenience sampling (due to lack of access to the registry of learners enrolled on the Stanford University Lagunita platform).
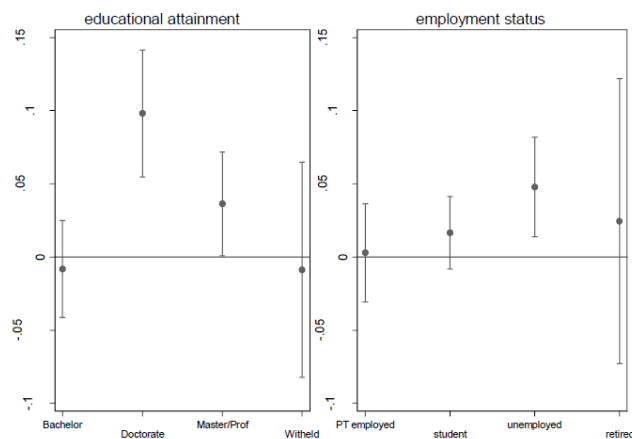
3. Results

3.1 Dropping out or cherry picking?

The analysis of quantitative data highlights a relative advantage of individuals with better socio-economic status (higher educational level, cognitive skills) (Figures 7.1 and 7.2). At the same time, it also shows a greater likelihood of completion for unemployed learners: this supports the hypothesis of a strategic use of MOOCs, consistent with a goal-rational type of social action (Weber 1922). This strategic approach seems not to be applied to all kinds of courses, but apparently only to those with a greater importance or applicability in the labor market (e.g. Statistical Learning).

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[4] The data were kindly provided by the Center for Advanced Research through Online Learning (CAROL) at Stanford University. The platform Lagunita ceased its activity in March 2020.

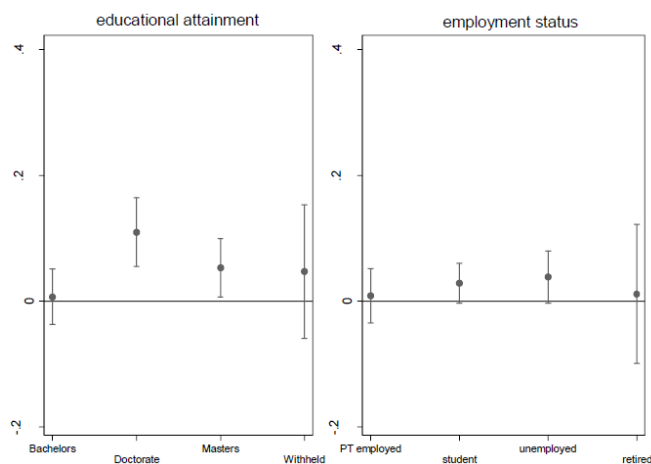**Figure 7.1.** *Average marginal effects of the probability of completing the "Statistical Learning" MOOC*

Figure 7.2 *Average marginal effects of the probability of completing the "America's poverty and inequality" MOOC*

Figure 7.3 *Average marginal effects of the probability of remaining engaged (>60% of quizzes) in the "Statistical Learning" MOOC*

Figure 7.4   *Average marginal effects of the probability of remaining engaged (> 60% of quizzes) in the "America's poverty and inequality" MOOC*
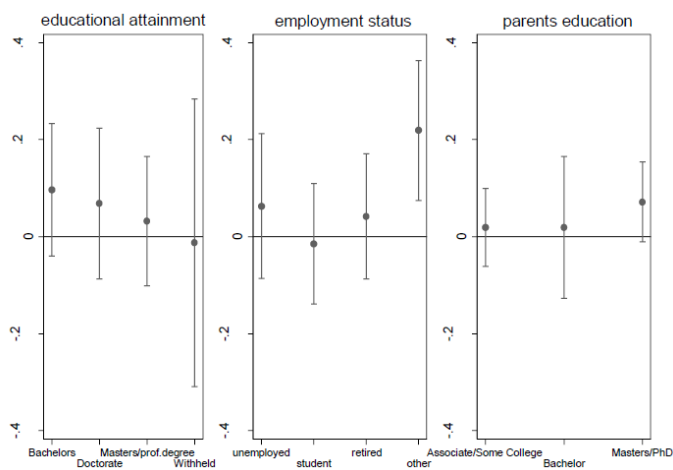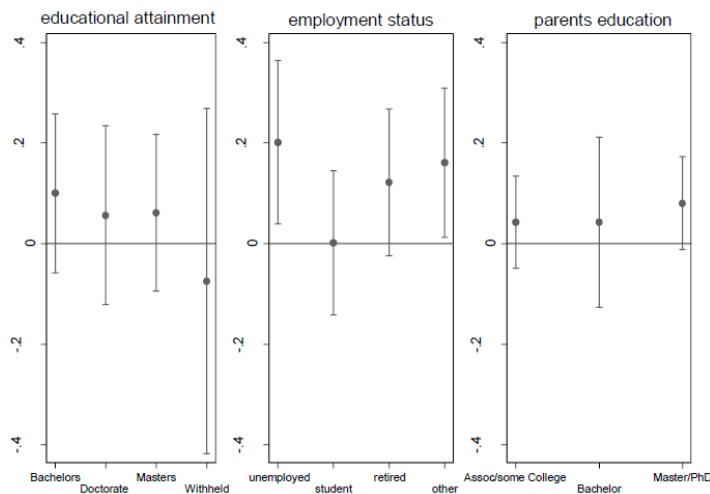
Source: own elaborations based on data from Lagunita platform, Stanford University

As far as engagement with course material is concerned, Figures 7.3 and 7.4 show that unemployed and inactive learners are more likely to remain engaged in the course but not to complete it with a certificate. Greater availability of time can be a crucial factor in staying engaged (both inactive and unemployed learners are likely to have more time than their peers) but, at least for unemployed people, not enough to attain a certificate.

The hypothesis of a strategic behavior by learners is then confirmed by the analysis of qualitative material, where all interviewees reported themselves to be at the same time completers of some courses and dropouts from others. Dropping out was thus a common phenomenon and not particularly problematized, at least by the pool of interviewees considered. Rather, the decision to continue the course until its end or instead the decision to terminate the course before the end of the scheduled activities emerges as the result of a deliberate decision, of a (more or less) strategic choice, suggesting that a general reference to disengagement actually conceals a more dynamic situation.

Regarding the courses completed, the interviewees confirmed a strategic behaviour. The 'completers' were learners who completed those courses which were more relevant to their jobs or future career prospects, for which they wanted to exhibit a certificate or wanted to master the subject:

> *"yeah, so for the AWS certification I had the goal of getting the AWS credential that they have created. I haven't actually got it yet, but I've finished the course." (William, 40, university degree)*

Similarly, the decision not to complete can be distinguished into two different routes: a) a deliberate choice, part of a strategic approach to MOOCs; b) an outright drop out, a passive drift out of a course. Therefore, rather than being summarized in the completion/non completion dichotomy the phenomenon can be better framed in terms of a distinction between active and passive conduct. The two patterns can also be termed a) 'cherry-picking' and b) 'dropping-out'.

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The former refers to a situation in which the learner selects only the parts of the course that are of direct interest to her/him. The choice of how much of the course to study was made by carefully considering the course content with respect to the learner's perception of his/her needs and initial skill levels.

> "the ones I've completed are even fewer, because I normally tend to pick up the part of the course that I need... and I don't necessarily need to complete the whole thing." (Thomas, 24, university degree)

However, exploring the multiple aspects of the phenomenon does not exclude the persistence of a more problematic side of the issue. 'Outright dropping out' may be the consequence of real difficulties in understanding the course content due to a lack of cognitive skills, or difficulties in organizing work and study time due to a lack of soft and organizational skills. This happens when leaving the course is passively experienced as resulting from a lack of time, self-regulation abilities and cognitive skills:

> "I ended up like having ten MOOCs open and going and then you start missing one deadline, you start missing the second deadline, start missing the third deadline and you give up because you're like "I can't keep up anymore". (Dorothy, 28, university degree)

3.2 Implications and policy relevance

The added value of combining quantitative and qualitative data to analyze such key issues concerning MOOCs resides in the fact that it yields a better understanding of all the multiple reasons that are hidden behind an overly simplistic conception of completion of a course. Indeed, most of the learning analytics code the completion of the course as a binary variable (0/1), where the decision to stop studying is coded as 0, and completing (with or without a certificate) is coded as 1. Yet, as seen in the qualitative material, this dichotomous outcome actually conceals multiple meanings, and it is the result of a conscious pattern. What is coded as 0 (not completed) may in fact be the result of an active process of selection by the learner (cherry-picking strategy). Or instead, it may be the consequence of real difficulties in understanding the course content due to a lack of cognitive skills, or difficulties in organizing work and study time due to a lack of soft and organizational skills (outright dropping out). Being able to distinguish between these two different patterns of action can improve the effectiveness of measures targeted on promoting online resources like MOOCs as a flexible and convenient form of lifelong learning.

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CHAPTER 8

THE USE OF INDICATORS IN RESEARCH ON INSTITUTIONAL POLITICAL PARTICIPATION BY YOUNG PEOPLE – SOME CRITICAL REMARKS

Dragan Stanojević, University of Belgrade, Serbia
Božidar Filipović, University of Belgrade, Serbia

Introduction

The subject of this paper is a critical review of the use of (a number of) indicators of institutional political participation in comparative research on young people. Created in a specific time, in a socio-political context, with a certain theoretical background, we believe that the use of such indicators in comparative frameworks, which include quite diverse socio-political structures and practices of young people, must comprise additional precautions during the analysis and methodological procedures for the formulation of instruments.

At least three major political traditions (or ideologies) rest on the assumption of the existence of free and independent citizens. Democracy, republicanism and liberalism start from the idea that the political community is made up of individuals able to articulate their own individual and collective interests. This assumption simultaneously implies the need for citizens who are actively involved in the political life of the community. The necessity of active participation in political life is viewed somewhat differently within these traditions. Nevertheless, they all see political participation as a crucial step in its constitution and survival within the desired framework.

Maria Grasso points to two groups of authors who perceive the importance of political participation in different ways. The first group consists of popular theorists of democracy who claim that participation is significant because it represents the "dominant method for developing and critically examining political ideas" (Grasso 2016: 4). Grasso includes John Stuart Mill in this group of authors. She interprets the second group – radical democrats – through the views of Ernesto Laclau and Chantal Mouffe. This group of authors sees political participation as "necessary for democracy since it is only through political struggle that society creates meaning and decides how it should be organized" (Grasso 2016: 4). Moreover, political participation is given a role in establishing social objectivity. It is established through power relations. According to this group of authors, the absence of political participation is the preservation of existing power relations. At the other end of the spectrum are the elite competition theorists. Although they emphasise the importance of political participation – primarily through voting – they consider it an act of legitimising the decisions taken by the elites. In contrast to the approaches mentioned above, "elite competition theorists are more pessimistic about people, considering them mainly ignorant, emotional and prone to 'crowd mentality'" (Grasso 2016: 4).

The combination of liberalism and democracy in the West was of key importance in establishing the foundations of contemporary political systems. The foundations of liberal democracy certainly include the rule of law, political and civil rights, freedoms, fair and honest elections, separation of powers, independent judiciary, etc. The researchers' interest in the problem of political participation therefore has significance outside the field of science. It is precisely the level of participation that is employed as one of the criteria for the functionality of the political system of liberal democracies. The so-called 'crisis' of established democracies is directly related to the insufficient level of political participation, which provokes suspicion towards the current political leadership, and even towards the entire political system. In the eyes of citizens, it is seen as insufficiently legitimate. It cannot be said that we lack terms to describe insufficiently democratic societies; or more precisely, societies that we could label as completely undemocratic.

Thus, terms such as 'illiberal democracy', 'semi-democracy', 'hybrid regime', 'electoral authoritarianism', etc., have come into use. We could also add 'populism' to the list, since it is most often seen as a threat to liberal democracy. There is no lack of analysis and consideration of what the criteria and conditions of true democracy (as well as its aberrations) are. However, paradoxically, it cannot be said that we have a large body of research and broader insights that would give us an answer to the question of what political participation actually means in societies that cannot be said to be truly democratic. The problem is particularly visible when we look at political participation in such political communities through the eyes of established democracy.

Young People and Institutional Participation

Political participation can be defined in many ways, but the most frequently cited source is Verba and Nie, whose premise is that (1975: 2) "political participation refers to those activities by private citizens that are more or less directly aimed at influencing the selection of governmental personnel and/or the actions they take". Van Deth (2001), citing several similar definitions (Milbrath and Goel 1977; Kaase and Marsh, 1979; Parry et al. 1992; Verba et al., 1995; Norris 2001), singles out four elements that are common to them: 1. actors are citizens (not politicians, the elite or the administrative apparatus), 2. political participation is an activity (reading newspapers, following the media does not pertain to it) which 3. is voluntary and is not carried out under the pressure of the ruling class or the law, and 4. is aimed at action government or politics in the broadest sense of the word. This approach to participation was also accepted during the formulation of the ESS instrument (Curtice et al., 2001), and it is used in a similar way within the analysis of EVS data (Inglehart 1990; Norriss, 2002; Noriss, 2004). These operationalisations were created by analysing data related to one or more countries with 'established democracy'. Although comparative research has begun to include countries outside this circle (primarily Eastern European, and then in the rest of the world), neither the theoretical assumptions nor the modes of operationalisation have changed significantly.

In the literature that investigates the relationship of young people with institutional[5] forms of participation, there is a high level of agreement that the downward trend of voting in elections in the general population is even more pronounced among young people (Fieldhouse, et al., 2007), that there are fewer and fewer of them in political parties, trade unions, and that they are less and less willing to directly contact their political representatives (Norris 2004; Furlong, Cartmel 2012; Henn and Foard 2014). The consequence of the withdrawal of young people from the traditional political field is interpreted in light of the general trends associated with the 'crisis of democracy' and 'democratic deficit' (Noriss, 2011), but also the opportunities to express their views through new forms of participation (often called 'unconventional', 'non-institutional' or 'elite-directing'). Although young people are more present in new forms of politics than older people, there is no agreement on whether new activities compensate for old ones, so that the results show that young people are increasingly involved in them (Marsh, O'Toole , Jones 2007; Renström, et al., 2020; Norris 2004; Furlong and Cartmel 2012; Henn and Foard 2014; Fieldhouse, et al., 2007), that participation is more or less constant (Pilkington and Pollock, 2015) or even declining (Fox, 2015). Regardless of the interpretations related to the reasons for increasing non-participation in the work of parties and the relationship with elected representatives, as well as the shift towards new forms of participation, the basic assumptions that support the operationalisation of conventional participation still stand.

In a number of studies (Grasso, 2014, 2016), the research design and analytical strategy take the socio-political context into account. They therefore compare only countries that are considered to belong to the same political cluster – most often, that of established democracies. This approach represents *a safe comparative strategy* because it connects similar societies to which the same theoretical assumptions apply. Another series of studies compare the participation of young people from different socio-political contexts. Among them, a number use contextual variables to control for institutional and political differences. For example, Norris (2004) uses the division into European regions to examine generational and life-course effects on participation. Although her analysis includes certain differences between clusters of societies, it focuses on the degree and not the quality of participation and considers that exposure to democracy works similarly in different contexts. What remains a key question is whether we can assume that the nature of 'democracy' is the same in quite different societies and that it has the same effects on motivation for (non)participation and outcomes in the political sphere. The last group of papers (Briggs, 2017; Kiisel, et al., 2015; Gallego, 2007) compare different societies without contextual indicators. In empirical findings, as a rule, certain differences or similarities appear where theoretically they would not be expected. Then one usually either resorts to *ad hoc* explanations or doubts remain for subsequent analyses and research.

Is it still justified to consider that if democracy is in crisis, membership of political parties and contacts with politicians are still its pillars? In the so-called 'young democracies' in which

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[5] Although in the literature there are different forms of theoretical explanation and operationalisation of participation that include membership/engagement in political parties and contacting politicians that are traditional, conventional (van Deth, 2001), or elite-directed (Inglehart, 1990), in this paper we will use the term 'institutional participation' without drawing fine distinctions among them.

democratic institutions and practices have not developed (like some post-socialist societies), does participation in political life through parties and relations with politicians have the same meaning? Most importantly, what motives are associated with these forms of participation, and what are their outcomes – is there more democracy, are the interests of different groups more represented, or is there less democracy and a more closed and exclusive society? The role of young people in these processes is of key importance because the manner of their political socialisation will shape political relations in the next few decades. Research focused on specific regions indicates that caution is necessary and that mechanisms to ensure comparability should be developed.

Indicators of (Institutional) Participation in Comparative Research

Although today we are witnessing new forms of political participation, participating in the work of political parties and addressing politicians directly are still considered important for the vitality of democracy. The World Values Survey uses both the indicators of participation that we investigate in this paper. In the case of the first indicator – membership of political parties – the research measures two forms of participation: active and inactive membership. The other indicator measures the past practice of contacting government officials or the future intention to do so. The European Social Survey uses only the first indicator, which examines affiliation to a political party or a similar group.

Table 8.1   *Dimensions of Institutional Participation in Two Comparative Studies*

|	WVS	ESS X	ESS IX	ESS V
Party membership	Political party membership			Are you a member of any political party?
Party activism	Active or inactive	Have you donated to or participated in a political party or pressure group?	Have you worked in a political party or action group?	Have you worked in a political party or action group?
Contacting a representative	Contacting a government official	Have you contacted a politician, government or local government official?	Have you contacted a politician, government or local government official?	Have you contacted a politician, government or local government official?

Within the ESS, we can follow the development of the use of indicators across waves of research. The ESS included a question about party membership until the V wave, when it was eliminated. Including the IX wave, the question of activism in political parties was formulated

as engagement during the previous 12 months with a political party or action group. In the last wave, this question was modified and in a certain sense expanded because it did not necessarily include work, but also donation to or participation in a political party from another pressure group. In all ESS waves, an indicator was used to measure contact established with a politician, government or local government official. The instruments developed in these studies did not deal with the motivation behind political participation by young people, nor with the potential outcomes of that participation.

Indicative Example

Participation in the work of a political party or a similar action group showed very large differences among young people in Europe: from being almost nil in Hungary to 11.1% in Iceland. According to the dominant theoretical assumptions, we would expect one of two scenarios: 1. in established democracies, young people participate to a greater extent in parties compared to new democracies, because such societies are more democratic, or 2. in established democracies, young people participate to a lesser extent because those societies are going through a 'crisis' of democratic institutions that young people in 'new' democracies have yet to experience. However, the distribution of this form of participation does not include any differences between 'established' and 'new' democracies, which indicates that some other explanations should be used when analysing it. Another indicator – contacting politicians – similarly shows that it is difficult to find any regularity in the distribution of this practice across Europe. If these indicators are still used as a framework within which to explain the degree of democracy within a country, do they also indicate the degree of differences in democracy among countries? They do so only under certain conditions. We believe that they can be used as parameters of democracy within a country only if there is clear evidence that the output of participation is greater democracy, and that the same precondition is met in all countries analysed.

Figure 8.1: *Participation in a party or action group across Europe – young people aged 15-30*

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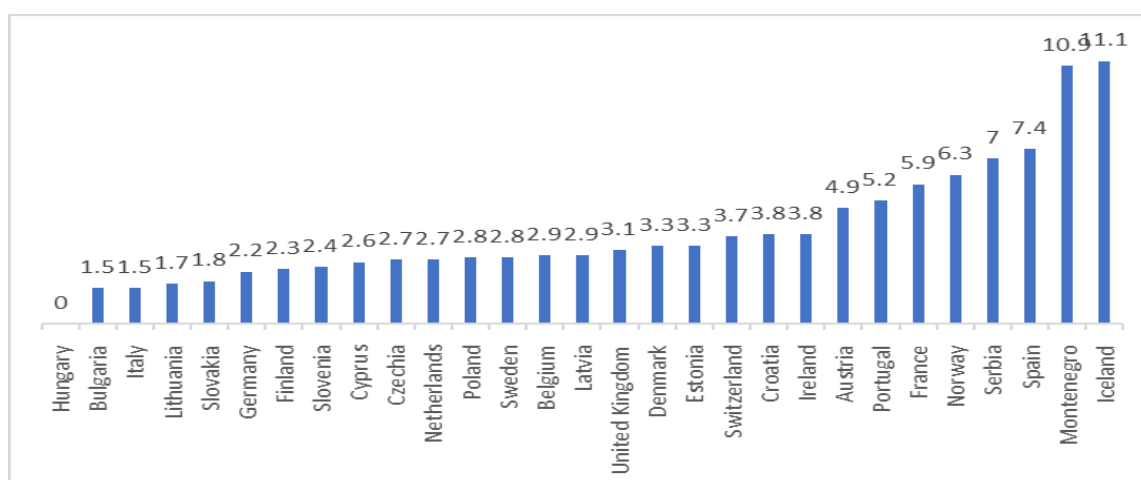
Research on participation (by young people) in the countries of Eastern Europe (Stanojević, Petrović, 2018; Cvejić, 2015; Bliznakovski, 2021; Gordi, Efendic, 2019; Ledeneva 1998; 2006; 2013), Southern Europe, such as Greece (Sotiropoulos, 2018; Afonso, et al., 2015; Papadopoulos 1997; Triantidis 2016) but also Central European countries, such as Hungary (Mares, Young, 2019) show that political activism can be largely a matter of clientelism shaping the political field. This means that a number of young people enter politics with clear instrumental goals, and that their engagement leads to the creation and reproduction of informal support networks and political exclusivism in access to public resources. This tells us that the motivation of young people for joining political parties, and being active in them, varies significantly.

Figure 8.2: *Contacted politician across Europe – young people aged 15-30*
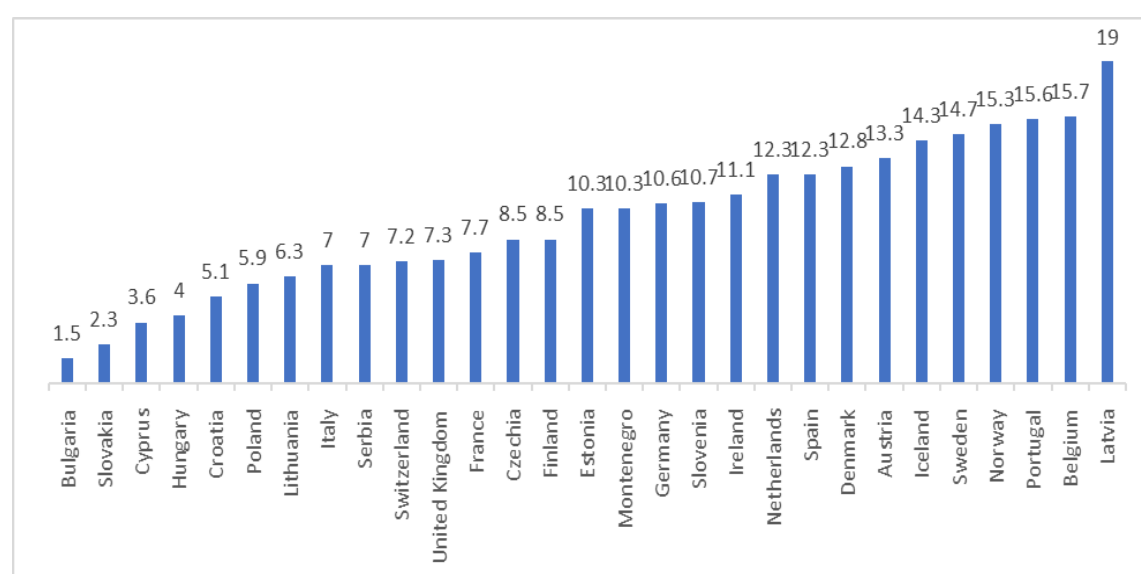
Source: ESS (2018) round IX

In the societies of the Western Balkans, there are four main reasons why young people get involved in the work of parties. 1. Most often it is a matter of personal instrumental motivation, the goal of which is to obtain a job through the party (there are different short-term, medium-term and long-term strategies that young people apply). 2. It can be an expression of informal solidarity with friends and relatives who need help. When someone is looking for a job, s/he also sees the political party as a channel, as a form of solidarity (family amoralism), his/her close friends and relatives can join the party with him/her, and be active in it. 3. It can be an expression of 'pressure' to keep a permanent job, or some of the privileges that it provides. 4. But here too we can detect, albeit to a relatively small extent, genuine activism based on the importance of the party's ideology and programme (Stanojević, Petrović, 2021).

We can interpret relations with politicians in a similar way. Contacting politicians in countries that do not have a representative system is not part of the tradition where politicians are directly contacted anyway, but the importance of informal connections can be a framework in which to explain part of the variance of this practice in 'young' democracies. In a number

of European countries, contacting politicians primarily means asking for a personal favour rather than expressing concern about a public issue. Hence this practice can have an anti-democratic rather than a democratic potential in a certain context.

Discussion - two correction proposals

One of the ways to overcome some of the research challenges described above is to include additional indicators when designing the participation instrument. Probably the best way to create them is to interweave quantitative and qualitative approaches. With the help of such indicators, we would be able to more reliably and accurately interpret the data generated in extensive research such as the ESS. Although it cannot be said that qualitative methods have not been used in the process of preparing the ESS questionnaire, their roles are significantly reduced and limited. With a qualitative approach – such as, for example, a cognitive interview – we would gain insight into the meanings that respondents attach to their answers (therefore, within the quantitative approach). This would make it possible to formulate new indicators relevant to the context of interpretation of other indicators (within the qualitative approach). For example, in the societies of Southeast Europe, different forms of political participation may be the result of a type of clientelistic relationship. A clientelistic attitude towards decision-makers often occurs not only for the sake of a given respondent's personal gain (or preservation of the existing level of social privileges) but also because of the feeling of solidarity towards family members or friends. A qualitative approach would make it possible to delve more deeply into the interpretations of the answers and the respondents' motives. Thus, political participation would be placed outside the framework of binary oppositions – participation or absence of participation – and would comprise diverse motives (from instrumental to altruistic) for participation as well as outcomes of participation (representation of interests or social closure in informal networks). More importantly, this approach would yield potential answers on how and in what way to conduct research on political participation in some of the societies of Southeast Europe. In these societies, the decision about (non)participation in political life is not taken exclusively on the bases of expressed individualism, complete freedom of choice, and public interest. This certainly applies to a proportionally much larger part of the population than is the case in established democracies. If, by means of a qualitative approach, we could find a 'target' that we would successfully and effectively 'hit' within a quantitative approach, the meaning of this kind of 'cooperation' among different methods would be fulfilled. More specifically, through cognitive interviews, we could arrive at the optimal wording of questions (further intended for use within the quantitative approach) that would refer to how and why to take a decision on one's political participation. In the above example, even the question about the reasons for the political participation of other persons (known to the respondent) could be of importance. For example, how many people do you personally know who have practiced certain forms of political participation in order indirectly or directly to obtain material and existential benefits? Or, how many people do you know who have been pressured to do (perform) a certain political activity, etc?

Such a research procedure opens up the possibility of formulating new questions and frameworks of interpretation for already-existing data. Some of the mentioned problems would certainly be less pronounced. In this particular case, we would obtain an answer to the question of what exactly political participation means in different countries. And how we can interpret it more precisely, reliably, and consistently using the data collected. In the case of international research involving dozens of countries, this research model does not necessarily imply spatial fragmentation and disintegration of the research process. Many of the variables that would arise due to better insight into the context and understanding of the meaning of political participation would be common to a number of countries. In any case, to be emphasised is the importance of the permanent use of qualitative approach in 'quality control' of data already collected by means of quantitative approaches. However, it is equally important to understand the role of a qualitative approach in the formulation of new indicators.

Another direction of model correction in which we include indicators of participation in comparative research is the use of contextual variables. These should always be included when analysing the databases of already completed research: that is, when it is not possible to add additional indicators. They should be crucial in explaining the differences among social systems, and potentially explain the (non)existence of an association with participation. Examples could be continuous variables such as various indices of democracy, or categorical variables such as political or welfare regimes.[6] The variables themselves should be sensitive and focused on the position of young people. In this way, it would be possible to recognise whether different socio-political systems have the same or different forms of participation and whether there is a (linear) relationship between the degree and form of participation. This kind of approach can confirm existing theories in certain comparative frameworks; but in others, it can raise new questions, require new theoretical explanations, and necessitate more precise operationalisation.

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[6] The latter strategy is applied in an interesting way by Pippa Norriss (2004), but without going significantly into the substantive differences among democratic systems in Europe.

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CHAPTER 9

IS THIS FINANCE FOR YOUNG PEOPLE? THE IMPORTANCE OF STUDYING THE HOUSEHOLD'S FINANCIAL ADMINISTRATION FROM A YOUNG PERSON'S PERSPECTIVE.

Valentina Moiso, University of Turin, Italy

Highlights

This paper argues that looking at how young people manage money, what monetary resources they can count on, and how they administer expenditures provides important insights into how, in a given institutional context, state support, income, and debts are interconnected in the representations and strategies of young people. The topics addressed in this paper are coherent with the point of the call about "Challenges of cross-national comparison", with particular regard to the focus on the challenges in comparative youth research and how to overcome them. The paper seeks to make a conceptual and empirical contribution to knowledge about how macro data at the national level can be combined with individual level quantitative or qualitative data.

- From a methodological point of view, linking the macro-institutional context with subjective experience is a challenge, and especially so from a comparative perspective. But it is a necessary step towards understanding the intersection between households and the institutional context, taking the point of view of young people into account.

- An important factor determining the differences among young people in Europe concerns the impact of different institutional contexts on living conditions. European states differ in their welfare systems and labour markets, but they do so also in some other institutions that are increasingly important in times of financialisation of the economy: the financial markets and banking systems that govern access to credit.

- In order to fully understand the impact of the joint action of these institutional contexts on young people's lives, besides macro-analysis of the main characteristics of these contexts, attention should be paid to everyday experiences and practices with in-depth research methods.

- In-depth research methods such as semi-structured interviews and household ethnography give young people a voice. They bring out different rationalities in their accounting and budgeting practices and in the devising of strategies to 'make ends meet', without assuming that the – often paternalistic and normative – representation of rationality proposed by the 'experts' is the only one possible.

- This last point is of great importance for devising innovative policies that support young people's autonomy, given that access to credit and financial literacy are

included in some policy measures taking young people's needs and expectations into account in order to make solutions fully sustainable for them.

Introduction: finance as a solution for young people's social problems

Young people in European countries are facing increased insecurity on the labour market, given the widespread nature of the flexibilisation process, and now that they have lost the safety net provided by the welfare state that characterized their parents' generation. How this process is enacted varies among countries: the conditions that young people have to face, the structure of opportunities and constraints available to them; above all, the resources they can activate through individual strategies differ greatly among countries. For example, low participation in the labour market can be more or less widespread among young people, and differently interlocked with income instability given the presence of income support policies. In the literature, it is well known how 'institutional filters' such as the educational system, labour market regulation, and the welfare system mediate the impact of flexibilisation, shaping the opportunities for individual decisions. This has consequences not only in the present but also in the medium term because it determines opportunities and the representation of the future.

The central point is that work does not provide the younger generation with stable and adequate salaries. This is a key issue: H.P. Blossfeld calls young Europeans 'the losers of globalisation' precisely by referring to how globalisation, the capitalist system in its present configuration, severely disadvantages young people. Precarious, low-wage jobs that do not give access to unemployment benefits, despite the efforts of young people, have incredibly exposed them to financial vulnerability – that is, the risk of having difficulties in budgeting, in dealing with present needs, and in predicting future ones, as in the case of retirement. This risk is not covered, as it used to be in the past, by a welfare system that helps people to cope with the social risk of falling into poverty. This is the so-called 'grey area' of the welfare system.

In order to cope with these problems, young people require innovative solutions. Innovation is understood as a relational process located in time and space that introduces new means with which to respond to social needs. Finance is a field in which innovation is very strong: the expression "financial engineering" is used to refer to the increasingly sophisticated products traded on markets. Finance is also being required to be innovative in terms of solving social problems. For example, the securitisation of sub-prime mortgages is an innovation that has given access to credit to individuals previously considered at risk and therefore excluded by banks, so that they can buy homes: an issue that has to do with integration and social citizenship but failed to be sustainable and led to the financial crisis of 2007-2008. Financial social innovation is a process with uncertain outcomes that requires governance; and given its importance in recent years, its impact on everyday life has to be taken into account when analysing inequalities.

Therefore, this paper assumes that it is important to consider the institutional setting as also comprising the financial system, in particular the level of inclusion of the banking system, and with attention paid to the access to credit. The credit risk assessment models used by banks in order to evaluate clients and give or not give access to credit vary among systems, and the ways in which the type of contract is assessed are different: while some countries, like neoliberal ones, are more inclusive, others are characterized by the denial of credit access to atypical workers. The chance of falling into debt, and specifically the devices proposed by banks to do so, is a factor that shapes not only the opportunities, the strategies, and the vulnerability of young people facing job and income insecurity, but also their conceptions of the opportunities and risks linked to budgeting, according to how the credit system is interlocked with the other institutions that structure the setting of the young people action. Moreover, some states include in public policies the possibility to support young people, not with direct monetary transfers, but by creating guarantee funds that facilitate their access to credit in banks.

In a system where the traditional sources of resources – the labour market, the welfare system – recourse to debt is not a question of changing the preferences of individuals. Preferences still matter, but we cannot forget that people devise strategies according to the resources that they are allowed to mobilise in a given institutional context. Taking account of the intersection between households and the institutional context is the way to answer an important question in comparative terms: from the point of view of young people, is indebtedness a resource or a trap? Fist? analyses on the issue of debt for precarious young people show that in the presence of certain configurations – a buoyant labour market, a citizenship income – debt is an opportunity for the autonomy of young people; but in the presence of a stagnant labour market, and in the absence of measures to guarantee income continuity, debt causes a worsening of financial vulnerability (Bertolini and Moiso 2022). However, this topic requires further investigation.

The ethnographic study of accounting practices

Sociology has considered finance as specialised knowledge, as a subject for experts; but it has also paid attention to how non-experts use financial instruments in practice. Finance has become pervasive in society, i.e. it affects social spheres where it did not appear before. In this regard, Martin (2002) refers to the financialisation of everyday life. However, there are studies that have looked at the other side of the coin, investigating the everyday practices in using financial instruments, and how finance works when it is performed by non-experts. They have furnished dense descriptions showing how these instruments are used in a variety of ways by individuals, 'domesticised', and incorporated into the factory of everyday life (Pellandini-Simànyi et al. 2015). These studies use Viviana Zelizer's concept of 'earmarking' (1994): financial instruments acquire meaning through interactions located in time and space and in cognitive and moral frames. There are few studies that look at the socialisation of economics in action: in performing a financial exchange, individuals may or may not share, transmit and even co-design principles, practices and instruments – a kind of learning-by-

doing. This is contrasted with the financial literacy that is acquired from numerous financial education projects that take a highly normative, top-down approach to how finance should work.

It is therefore important to study how these instruments are rooted in context by considering ties and obligations, different ways to calculate and socialise the use of money, and the tools and structures of information available. In parallel, these micro analyses of how financial instruments are socially rooted in the domestic context of action show how their use contributes to perpetuating inequalities and domination, as well as creating new pockets of vulnerability.

It is possible to apply the indications provided by economic ethnography in the form of a method that does not take the categories of thought of experts for granted but compares them to the categories of practice, thereby adopting a substantive conception of economics and finance (see also Bourdieu 1977). Research is thus configured as an investigation of individual practices at the intersection among different spheres of society, with attention paid to the institutional construction of these spheres and the ways in which individuals compose them in their existences. Is it therefore important to avoid assuming a rational theory in order to assess the deviations from it, but instead to go in search of the practical rationality of individuals, reconstructing their reasoning from the practices that they claim to apply in their everyday management of money and from their frameworks of interaction (Dufy and Weber 2007).

The analysis of what we might call the 'domestic economy', i.e. the domestic practices of calculating and evaluating goods and services, is widespread in France, where these analyses are mainly economic ethnographies (Moulévrier 2003; Dufy, Weber 2007) that aim to observe the effects on society of the new possibilities of access to credit, and banking more generally (Lazarus 2009), and that focus in particular on the working classes (Perrin-Heredia 2011; Ducourant 2009) and on the phenomenon of over-indebtedness (Plot 2009; Lacan 2010). But ethnographic studies of finance at home are increasing, and they show the creative ways in which people combine resources and financial products by developing everyday life strategies.

Individual strategies, as well as individual meanings, feelings and representations, are deeply analysed with semi-structured interviews; but their analysis can also benefit from an even more intensive focus that adopts the approach of so-called 'domestic ethnography'. This involves reconstructing, not only by asking young people but also by directly or indirectly observing them, how they pursue their own budget management strategies in everyday life by combining different resources (salaries, subsidies, loans from relatives and/or from banks).

Highlighting the *discrepancies*

In these researches, young people's difficulties come to light, especially in terms of discrepancies. An important finding concerns the discrepancy between domestic and

institutional times (Lacan 2010; Roux 2009). In particular, in the relationship with the future, the *idea of foresight* in capitalist economies has replaced what used to be the *idea of provision* in community economies (Bourdieu 2008). People has to foresight to themselves, by autonomously composing the resources available. This does not apply to all young people in Europe, but it is stronger for those who live in contexts where institutions are less interconnected (Unt et al. 2021). For example, this is the case of some English-speaking countries in which there are low-wage jobs on the labour market, and the absence of a citizenship income, but the banking system allows young people to easily fall into debt, and easily become over-indebted with difficulty in repayment, so that they are exposed to high financial vulnerability and the consequent risk of social exclusion. By contrast, in some countries of Eastern and Southern Europe there are situations of *institutionalised precariousness* in which exclusion from a permanent contract entails exclusion from unemployment benefit and exclusion from the credit system, regardless of income level. Experiencing one of these discrepancies has a considerable and variable impact on young people's strategies, but also on their sense of citizenship in terms of political representation and recognition of social rights (Meo et al. 2021).

Adopting the framework of rhetoric of foresight rather that of rhetoric of provision when analysing financial administration by young people makes it possible to address an important question: is indebtedness a private matter, or does it have collective implications? 'Collective' in the sense that it calls into question the interdependence among citizens which is at the basis of a citizen's sense of belonging, at the basis of his/her right of citizenship. In fact, when indebtedness becomes a private matter but is used to cope with social needs, we have one of many forms of the transfer of risk from the system to the individual. The task of finding solutions for and protection against financial vulnerability pertains to the individual, who goes into debt in case of need, just as s/he resorts to a private pension fund to protect him/herself against the risk of poverty in old age.

Therefore, these analyses make it possible to address the issue of responsibility and skills. If responsibility lies with the individual, s/he must possess skills adequate to managing the resources at his/her disposal in order to protect him/herself against financial vulnerability. Otherwise, the system breaks down. This is where financial education comes in, and it is important to recognise its extreme usefulness, but not to confuse poverty, or financial hardship, with the absence of skills. Poverty is first and foremost the absence of money, not the absence of the ability to manage money; on the contrary, a poor person is often highly skilled in 'making ends meet' by managing the few resources that he or she possesses. The 'poverty equals incompetence' equation is a stereotype that is difficult to dismantle; it has ancient roots. Italian migrants landing in the USA in the 20th century were even given a pamphlet on how to properly manage a family budget: poor and foreign, they were presumed unable to look after themselves. To what extent do young people see themselves branded as incompetent and irresponsible, regardless of their behaviour? Young people are often subject to such labelling, which has a major impact on their self-representation, their vision of the future, and their strategies.

On the contrary, account should be taken of how life courses have become much more complex than in the past, People no longer have orderly careers, and they are intertwined in double strands with what is happening at the macro level, the economic conjuncture. The emergence of financial difficulties in this situation is the result of individual choices made in conditions of extreme uncertainty, where individuals can lose control over the outcome of their actions.

Consequently, finance and its instruments can become subject to political contestation, with a shift from individual shame to a political fight when people in financial trouble "understand the responsibility for their situation as shared with the financial institutions and public policies that had encouraged massive levels of household debt accumulation" (Ossandòn et al. 2021, p. 16). Many studies on this topic focus on young people: for example, in the case of student debts (Gonzàlez-Lòpez 2021).

For young people, getting into debt is either a risk or an opportunity depending on the context, on how the labour market is configured, on income support and the presence of guarantee funds, on the regulatory system protecting the indebted, on the degree of innovation in the banking system's products, and on the level of prejudice against the underprivileged. Indebtedness is a highly social issue, that is, it relates to how a specific society and its institutions function, and on this functioning, and on the narratives of debt, there is a lot of opportunity to impact to help financially vulnerable young citizens protect themselves [non riesco a seguire la sintassi/il senso di questa frase]. In order to fully understand the impact of the joint action of these institutional factors on young people's lives, alongside macro-analysis of the main characteristics of these contexts attention should be paid to day-to-day experiences and practices with in-depth research that gives young people a voice without assuming that the representation of rationality proposed by the 'experts', often paternalistic and normative, is the only one possible. This point has close relevance to devising innovative policies that support young people's autonomy, given that access to credit and financial literacy are included in some political measures that take young people's needs and expectations into account in order to make solutions fully sustainable for them.

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