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Not Now: Negotiating Research Access during Phases of Crisis

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Abstract

The conduct of qualitative research often rests on a fundamental condition: the establishment of research access. Gaining quality research access is a challenge even at the best of times due to the intimacy and timescale of data collection. This challenge becomes even more severe in situations of crises, such as the Covid-19 pandemic, when actors are concerned with maneuvering organizations through tough times. Despite its centrality for the conduct of qualitative research, there is a lack of methodological studies on the establishment of access in management and organization research. Therefore, this article contributes to the methods literature in management and organization research by investigating the enabling conditions of research access in crisis situations. We draw on a comparative case analysis of eight instances of access negotiations conducted during the Covid-19 pandemic. We show how interpersonal trust and perceived value of the research project mitigate the constraining effects of Covid-19, and we also reveal the underlying mechanisms through which trust and perceived value are established. Our findings are of relevance to all researchers seeking research access for qualitative research projects.

Keywords: *Qualitative methods; Research access; Crisis negotiation; Covid-19 pandemic; Management research*

Qualitative organization and management research usually aims to shed new light on otherwise hidden phenomena (Bourdieu, 2007). Its purpose is often to develop a new theory (Denzin & Lincoln, 2008) or to contest taken-for-granted theoretical assumptions (Alvesson & Kärreman, 2011). Qualitative researchers do that by providing in-depth analyses of highly diverse settings, be it entrepreneurs (Jack & Anderson, 2002), large multinationals (Friesl & Silberzahn, 2017), orchestras (Maitlis, 2005), public sector organizations (Jarzabkowski & Wilson, 2002) or churches (Kern & Pruisken, 2018). The list is deliberately anecdotal and could easily be continued. While research in these particular contexts might be ends in themselves, the literature on qualitative methods teaches us that research contexts should be of theoretical significance (Eisenhardt, 1989). In order to allow conceptual development in a particular theoretical setting, adequate research contexts need to be selected (Yin, 2009).

This theoretical significance of different research contexts rests on the engagement of the research team with actors in the respective setting. There is the often tacit assumption that the theoretically-driven research objective is in line with organizations' agendas that are granting access

(Laurila, 1997). Also, qualitative research is often conducted over long periods of time (Van de Ven & Huber, 1990), in close collaboration with actors in the field (Cunliffe & Alcadipani, 2016), thus requiring intimate access to partly high confidential information (Balogun et al., 2015). This is mirrored by top journals' expectations regarding data quality and empirical rigor (Gioia et al., 2013; Pratt, 2009), which require such levels of research access.

The establishment of research access is difficult even at the best of times. Yet, establishing access for theory-driven research is particularly challenging in situations of crisis. Crises can take on various forms. They may involve states of national emergency, but at the same time also refer to the lived experience of particular people. Hence, they may be the issue of the time and the troubles of individual actors (Mills & Gitlin, 2000). Inherent in these different notions of crisis is the ambiguity regarding what happens next (Bergman-Rosamond et al., 2020). From an organizational point of view, these highly uncertain but impactful situations may threaten the very core of the organization and thus often precipitate inward-looking behavior (Weick, 1988) at the expense of external collaborations with researchers.

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The Covid-19 pandemic has affected most aspects of private and professional lives and has added substantial economic and emotional strain on managers and employees. This pandemic is very much an extreme case (Yin, 2016), which is likely to amplify behavioral patterns with regard to access negotiations. Thus, the need to deal with Covid-19 or any crisis, for that matter, inevitably becomes an intricate part of any discussion about research access and any social interaction after that. This challenge has been famously highlighted during the Hawthorne studies that were interrupted by the fallout of the Great Depression (Roethlisberger & Dickson, 1939).

This article specifically focuses on establishing research access in situations of crisis. Despite its centrality for the very conduct of qualitative research, there is a general lack of methodological research on research access (Cunliffe & Alcadipani, 2016; Peticca-Harris et al., 2016; Whittle et al., 2014). While certain standards of data collection and analysis are very well established and form part of the methodology sections of the vast majority of empirical papers (Langley & Abdallah, 2011), an important step is often missing in our methodological rule book: how do we get access to these research contexts in order to collect data in the first place? Research access still represents a blind spot in research methodology and is often only briefly discussed in methodology texts (Cassell et al., 2018; Easterby-Smith et al., 2013). Moreover, while prior research has highlighted that crises might become a catalyst for research access as managers might seize the opportunity for reflection (Laurila, 1997), this might not generally be the case. We consider it important to get a better understanding of how situations of crisis constrain those attempts and to know which enabling conditions might mitigate these influences. This is the focus of this article.

Our research is based on a comparative analysis of eight cases in which we attempted to negotiate research access with organizations during the national lockdown of the Covid-19 pandemic in the first half of 2020. All companies in the sample are located in Germany and rely on multinational supply chains. Therefore, especially at the beginning of the Covid-19 pandemic, organizations faced a high level of pressure and uncertainty as knowledge was limited and the impact of the lockdown measures were unclear.

Our findings provide intricate insights into the establishment of research access in situations of crisis. The analysis reveals the importance of establishing individual-level trust and the perceived value of the research project to counteract the resource constraints faced by companies. What is more, we identify the activities through which both trust and perceived value are created in the interaction between researchers and organizations. We summarize our findings in a conceptual model and juxtapose it with prior research methods on the establishment of research access.

Establishing research access: A review of the literature

Even without economic crises, conducting qualitative research is a challenge. Qualitative research has been in the shadow of its quantitative counterpart due to the lack of uniform quality standards for the longest time. Over the past years, efforts have been made to increase the volume of published qualitative research papers and also improve the rigor of data analysis and display (Bartunek et al., 2006; Rynes & Gephart, 2004). In line with other research types that aim to collect primary data, qualitative research has an important condition: research access. The importance of access needs to be considered against the backdrop of what researchers aim to achieve by using such methods.

The issues that qualitative research focuses on deal with the question of 'how' (Yin, 2016). Thus, by its very nature, it aims to shed new light on the otherwise hidden phenomena – how social experience is created, how it is given meaning to, and how it produces representations of the world to make it understandable (Denzin & Lincoln, 2000). Qualitative research is based on different epistemological and ontological positions (Alvesson & Sklödberg, 2000; Guba & Lincoln, 2005; Symon & Cassell, 2014) and a wide range of methods, ranging from content through to discursive analyses (Clarke et al., 2012; Johnson et al., 2007; Morgan & Smircich, 1980). The missing 'boilerplate', as Pratt (2009) put it, is a challenge, yet it is also a major strength of qualitative methods. It requires researchers to be creative and flexible, thereby providing the means to cast a fresh look at otherwise taken-for-granted phenomena (Bourdieu, 2007). Transferred to current organization and management research, qualitative approaches try to produce knowledge about organizations in which the meaning and implications of activities, technologies, symbols, and language are crucial but require interpretation (Belmondo & Sargis-Roussel, 2015; Clarke et al., 2012; Orlikowski & Scott, 2008).

Due to its creative and case-dependent nature, the methodological rule book on the conduct of qualitative research is still fragmented (Gioia et al., 2013; Langley & Abdallah, 2011). Nonetheless, what all these research approaches have in common, independent of their underlying assumptions or applied methods, is that they rely on access to empirical research settings. Even though attention has increasingly shifted to the actual practices of researchers (Feldmann et al., 2003), little is known about the hurdles that researchers in the management and organization field have to face when negotiating research access (Cunliffe & Alcadipani, 2016; Laurila, 1997; Peticca-Harris et al., 2016; Whittle et al., 2014). Furthermore, how is the establishment of research access affected by the situation in society, such as the unprecedented socioeconomic and health-related challenges created by the Covid-19 pandemic?

For the majority of qualitative researchers, access is paramount, whether this is for conducting interviews or collecting ethnographic data (Burgess, 1984). Thus, permission to enter an organization or engage with specific individuals is essential for any kind of qualitative research (Cunliffe & Alcadipani, 2016; Whittle et al., 2014). The degree of access may vary, ranging from a single interview to the freedom to go, observe, read whatever and talk to whomever over a particular period of time (Glesne, 2016). Generally, a distinction can be made between 'primary access' as a gateway to the organization itself and 'secondary access' as the admission to people and information within the organization (Brannick & Coghlan, 2007). This exemplifies a twofold challenge faced by researchers when trying to conduct research in organizational settings; even if primary access is granted, it does not guarantee that secondary access is ensured (Cunliffe & Alcadipani, 2016).

The social sciences as a field engages with human relations and interactions through organizational and institutional characteristics, reflecting different levels of research access (Adler et al., 2016). Interest in the topic of gaining research access has been around in many social science disciplines such as anthropology, sociology, psychology, and communication studies for quite some time. In contrast, in organization and management studies, this issue has not yet received much attention (e.g., Bruni, 2006; Cunliffe & Alcadipani, 2016; Easterby-Smith et al., 2013; Feldman et al., 2003; Laurila, 1997; Taylor & Land, 2014; Whittle et al., 2014). Table 1 gives an overview of existing methods literature on research access across different research disciplines, settings, and organizations.

An important theme in prior research has been the 'relationship' between the researcher and the organization. In this respect, several authors point out the importance of highlighting shared objectives and building trust in the process of negotiating access (Laurila, 1997; Neyland, 2008; Whittle et al., 2014). These authors also emphasize that access must be understood as a social phenomenon, going beyond solely physical access to organizations (Fjellström & Guttormsen, 2016). In that sense, the relationship of researchers and 'gatekeepers' in the organization is central for obtaining access (Crowhurst, 2013; Gummesson, 2000; Irvine & Gaffikin, 2006; Okumus et al., 2007; Peticca-Harris et al., 2016). To achieve that, these studies emphasize building a network of informal relationships across different hierarchical levels (Fox & Lundman, 1974).

Other studies reveal the required 'skill and capabilities' of the researcher. Accordingly, researchers need to be skilled negotiators (Whittle et al., 2014) to present the study's usefulness and the added value of possible insights into managerial issues and problems (Coleman, 1996; Gouldner, 1964). In this respect, the methods literature emphasizes that the researcher needs to establish credibility (Cunliffe & Alcadipani, 2016; Harrington, 2003) by signaling research expertise (Mander, 1992).

Prior research also reveals the role of ethical choices as part of establishing access (Cunliffe & Alcadipani, 2016). These studies argue that it is important to highlight the research and the researcher's harmlessness, for example, by adopting a suitable situation-related language (Laurila, 1997; Yeager & Kram, 1990). Finally, researchers may deal with questions of how to 're-access' the field after having exited, which is particularly relevant for periodical data collection (Karjalainen et al., 2015; Michailova et al., 2014). However all of the authors listed above refer to the underlying challenge of getting access and the little insight we still have.

Organizations and researchers may have distinct expectations of what constitutes a good research access. There is no one-size-fits-all solution, particularly if the organization is faced with adverse conditions in its environment. Crises as situations of existential threats, which may affect performance, ownership, and the competitive situation, have been essential areas of empirical research (e.g., Habersang et al., 2019), but only the methods study by Laurila (1997) considers the role of crises in the context of research access. Building on the experience of doing research at a company living through a corporate crisis, the author shows that this context might facilitate the process of getting research access. This is due to the stimulated reflectivity of managers on their own acts and intentions as well as on those of others. Thus, research access might be more easily obtained, as managers feel the need for support, and the inclusion of researchers makes their issues appear more credible.

Answering the call of Laurila (1997, p. 417) on 'how other management scholars have obtained and sustained "excellent access"', this investigates access negotiation processes with eight companies of different initial backgrounds during the Covid-19 pandemic. While taking into account each negotiation process's specific nature, we identify six crucial factors for negotiating research access during an economic crisis.

Methodology

We adopted a comparative case design to gain in-depth insights into the negotiation process for qualitative research during the Covid-19 pandemic. This approach is appropriate for research where there is only little knowledge about a subject, or extant theory seems insufficient. Additionally, this method provides us with the possibility to gain a deep understanding of the research object (Eisenhardt, 1989; Yin, 2009, 2018). Therefore, choosing this method allows us to gain deep insights into the complex social process of access negotiations during a crisis. Also, it creates robust results as we draw on different empirical sources to underpin our findings (Eisenhardt & Graebner, 2007).

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Table 1. Overview of selected methods literature on research access

Author and year	Research context	Enabling conditions	Crisis-related constraints
Cunliffe and Alcadipani (2016)	Ethnography	• Gaining credibility • Establishing trust • Understanding ethical choices	• Availability of formal/informal gatekeepers • Shifted interests of the organization • Backstage events not happening
Fox and Lundman (1974)	Participant-as-observer study (Police department)	• Informal relations with top-level executives • Relations at multiple levels of hierarchy • Openness of the organization	• Crisis induced constrained may overpower personal relationships • Multi-level relationships require initial access • Firefighting might reduce openness
Harrington (2003)	Ethnography	• Social identity of researcher • Self-presentation of researcher	• During crises access not reducible to researcher, gatekeeper relationship
Feldman et al. (2003)	Not specified	• Access requires relationship building	• Continues to be highly relevant in crisis situations
Irvine and Gaffikin (2006)	Case study	• Relationship to the gatekeeper • Transparency in research scope and expected outcome	• Availability of identified formal/informal gatekeepers • During crisis situations access not reducible to researcher, gatekeeper relationship • Shifting interests of the organization
Laurila (1997)	Interviews and document analysis	• Crises as enabling condition of access • Managers are in need of help	• Access for non-crisis research topics becomes problematic
Mander (1992)	Interviews (Mothers and midwives)	• Relationship to gatekeepers • Research experience	• Availability of identified formal/informal gatekeepers • During crisis situations access not reducible to researcher, gatekeeper relationship
Ostrander (1993)	Interviews, observation, document analysis (Elites)	• Chance meetings • Own social contacts • Networking • Transparency of research scope/goals	• Covid-19 pandemic made networking and chance contacts more difficult
Peticca-Harris et al. (2016)	Not specified	• Flexibility in the research approach • Transparency in research scope and expected outcome	• Continues to be highly relevant in crisis situations
Roesch-Marsh et al. (2012)	Ph.D. researcher	• In-depth knowledge about organization • Relationship with gatekeeper • Contribution to org. objectives	• During crisis situations access not reducible to researcher, gatekeeper relationship • Shifting interests of the organization
Whittle et al. (2014)	Ethnography	• Discursive tactics during negotiations	• Continues to be highly relevant in crisis situations

Our analysis is based on the data of research access negotiations at eight companies based in Germany. These access negotiations formed part of two wider research projects on organizational transformation and change that were unrelated to situations of crisis and the pandemic. For the purpose of this article, we selected those cases that coincided with the Covid-19 crisis. Table 2 provides an overview of the cases, the situation before the crisis, case characteristics, and contact level within the firms.

Data sources and collection

This article and the cases it draws on do not reflect a specific study for gaining research access, but to a greater degree, reflect the research teams' experience about the respective negotiations during the Covid-19 pandemic. Our analysis draws on several data sources (see Table 2). For all the eight cases, the initial contact was via email. The initiator was either the research team (Construct and Sprinter), a third party in the form of the business engagement department (B-Tech Hopsbrew, and Streamline), or the company itself (Cookhouse, Tier-One and Robo-Tecs). These initial contacts were followed by a vast amount of email correspondence, face-to-face meetings, as well as video and phone calls with the companies.

We used email correspondence as a rich source of information, to reconstruct a chronology of the negotiation processes for each case and to reflect on critical statements made by firms and third parties. The minutes and notes from face-to-face meetings, and video and phone calls were used in combination with the email correspondence to reconstruct access negotiations. Additionally, the research team draws on its experiences during the particular negotiations and the critical discussion thereof.

Data analysis

As different lengths and outcomes characterized the negotiations, we identified major events during the Covid-19 pandemic, such as the closing of the borders and full lockdown, to generate a time frame for the general course of the crisis (Langley, 1999). In combination with the email correspondence and meeting minutes, we then reconstructed the individual negotiation processes and mapped them against the various lockdown decisions imposed. Following this, our analysis is subdivided into two major parts: (1) within case analysis and (2) cross case analysis – to seize novel findings from our data set (Eisenhardt, 1989; Miles et al., 2020). (1) At first, and to avoid the issue of 'death by data asphyxiation' (Pettigrew, 1990, p. 281), we accumulated all available data from the above-described sources and filtered them for relevance to the research objective. We then established and compiled descriptive codes

for each case based on rationales for granting or rejecting research. (2) Following the first step, we established a basis for our cross-case analysis to find common themes across cases. Here we looked for emerging patterns and commonalities against the backdrop of research access negotiations. Consequently, we identified six mechanisms that influenced the establishment of research access (contact person, third-party involvement, local embeddedness, research fit, action scope, and resource sensitivity).

The described two-part data analysis was characterized by an ongoing, critical discussion of the research team, which led to constant refinements of codes and emerging patterns. Hereby, the research team's experience in qualitative research, as well as establishing access, has played an important role (Sanday, 1979; Zhang & Guttormsen, 2016). As this article is largely based on the research team's experience in negotiating access, it is important to highlight the author team's specific backgrounds. The first author has more than 15 years of academic experience in various positions at multiple universities throughout Europe. The other authors were in their initial attempts to negotiate access. This allowed them to ask critical questions during data analysis (Nemeth et al., 2001).

To achieve a more nuanced analysis, we then aggregated the emerging themes into two main categories of research access during a state of crisis, namely 'establishing trust' and 'influencing perceived value'. Specifically, these are constituted by three themes each: establishing trust builds upon third party involvement, local embeddedness and the contact person. Influencing the perceived value of research expands over resource sensitivity, action scope and research fit (see Figure 1).

Negotiating research access during phases of crisis

The socio–economic context during the Covid-19 pandemic

The outbreak of the Covid-19 pandemic had severe consequences for societies worldwide that affected individual freedoms, social life as well as the economy. For example, containment measures caused firms' performance to nosedive, putting many companies under fierce pressures, existential threats, or even completely out of business. Unemployment soared across the EU to over 15 million people (Romei, 2020a). Amongst other countries, major economies, such as Germany and the UK, saw record declines in GDP (Romei, 2020b; Strauss et al., 2020) due to a substantial drop in consumer spending as well as overall economic activity. A 'new normal' became an immediate buzzword to describe rising uncertainties and mold-breaking demands on individuals' lives

Table 2. Overview of case companies

Case	Situation prior to crisis	Case characteristics	Employees	Prior relationship	Initial contact; initiator	Data sources	Level of education; position of initial contact person	Research access
B-Tech	Entrenchment	• National focus • Traditional / conservative industry	250	No	Email; Third party	• Email • Videoconference • Meeting notes	Ph.D.; MD	No
Construct	Entrenchment	• National/regional focus • Traditional / conservative industry	600	Yes	Email; Research Team (RT)	• Email • Face to face meeting • Phone call • Meeting notes	MBA; TMT	Yes
Cookhouse	Diversification and Internationalization	• International focus • Traditional / conservative industry • Market leader in its segment	750	No	Email; Cookhouse	• Email • Videoconference • Meeting notes	Ph.D.; Vice President	Yes
Hopsbrew	Internationalization	• International focus • Traditional / conservative industry • Market leader	200	No	Email; Third party	• Email • Videoconference • Meeting notes	Dipl. Ing (MSc); MD and Owner	Yes
Sprinter	Internationalization	• International focus • Market Leader (Europe)	1600	Yes	Email; RT	• Email • Face to face meeting • Meeting notes	(1) M.Sc.; Teamlead (2) Professional Training; Vice President	No
Streamline	Diversification and Internationalization	• International focus • Traditional / conservative industry • Market leader	250	No	Email; Third party	• Email • Face to face meeting • Videoconference • Meeting notes	Dipl. Ing (M.Sc.); MD and Owner	Yes
Tier-One	Diversification	• 'Big old company in traditional industry' • International focus	26.000	Indirect	Email; Tier-One	• Email • Videoconference • Meeting notes	(1) M.Sc.; Executive Assistant (2) M.Sc.; TMT	Yes
Robo-Tecs	Entrenchment	• National focus • Traditional / conservative industry	80	No	Email; Robo-Tecs	• Email • Face to face meeting • Videoconference • Phone call • Meeting notes	Ph.D.; MD and Co-Owner	Yes

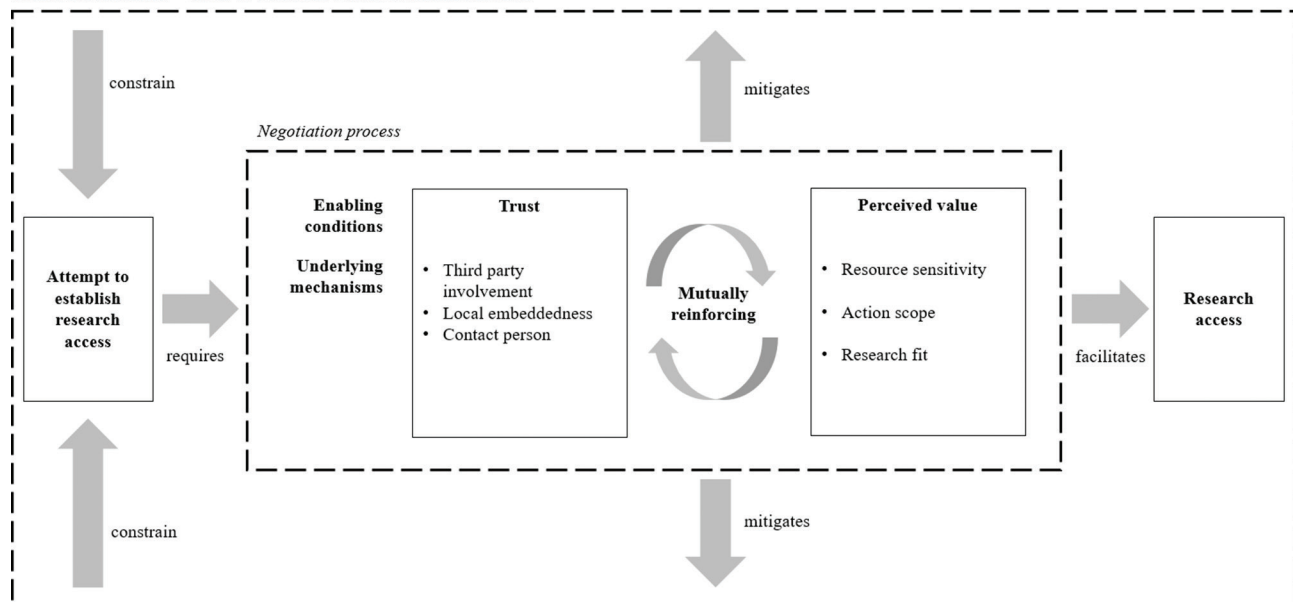*Contextual conditions – Covid 19 Pandemic / Socio-Economic Situation*

Figure 1. Establishing research access in times of crisis

(Budhwar & Cumming, 2020). Hence, to manage the crisis, the activity focus of organizations was characterized by 'firefighting'. Furthermore, in an attempt to realize short-term cost cuts, companies applied for furlough and suspended projects that were not relevant for survival. Therefore, organizations proceeded with caution regarding any new project proposals.

Additionally, granting access to qualitative researchers is always intertwined with vulnerability on the organization's side. By opening up to an external team of researchers, organizations inevitably reveal sensitive information and potential weaknesses. This increases the complexity of those seeking access tremendously. Our findings, summarized in Table 3, suggest several factors influencing access negotiations. Additionally, Figure 1 highlights the interconnection and causalities of these factors to establish research access.

Establishing trust for research access

Obtaining access to qualitative research always requires a high level of trust. This is even more so in situations of economic uncertainty. Our findings suggest three crucial factors influencing the establishment of trust during access negotiations.

Third party involvement

Our data indicates a positive relationship between research access and a third trusted person or institution, which advocates for the credibility and usefulness of the research proposal. This has multiple positive implications for research access

negotiations. First, it potentially boosts the initial contact where reactions might be few and far between in terms of responding to project proposals. Moreover, it allows the researcher to get a more nuanced idea about the firms' current situation and issues.

This is exemplified in the contact with the business engagement department of a city council through which we were able to draw on a broad network of firms. The department and its staff are well known and trusted by business owners in their district. The possibility of disseminating our proposal within their network enabled us to reach a wide range of companies in the area. It also allowed us to scan the environment and preselect potential firms for our research project, increasing communication efficiency. This third-party approach enabled research access discussions with Hopsbrew, Streamline and B-Tech.

Without involving a third party, in the form of the city council's business engagement department, the contact with Hopsbrew and Streamline might not have been established as they can be described as hidden champions with low visibility, flying under the radar of the public interest. Therefore, the trustee, in the form of a third party, provides crucial information and networks that enabled successful access negotiation during the crisis. Still, resource constraints on the side of B-Tech (particularly in terms of employee and managerial time) prevented successful research access. This implies that the enabling conditions of research access are not necessarily isolated but may mutually constitute each other.

Table 3. Overview of findings

Case	Mid crisis situation	Overview of the negotiation process	Duration	Mechanisms of research access
B-Tech	• Systemically relevant • No furlough	• First contact: June 2020 • Contact to the firm was brokered via business engagement department of city council • Negotiation ongoing	Ongoing	*Third party involvement* • Contact brokered via city council *Local embeddedness* • Company is located in the city *Contact person* • MD has a PhD *Resource sensitivity* • Cost issues *Research fit* • Strong fit with research project • Further collaboration desired
Construct	• Financial difficulties • Cost-cutting • Explorative/Interesting projects for research put on hold	• First contact: October 2019 • Several calls as well as personal conversations • Initially access granted (before crisis) • Access for research considered not appropriate anymore • Refined research objectives • Limited research access granted	6 months	*Contact person* • Strong personal prior connection to top management *Action scope* • Prior engagement in similar projects *Resource sensitivity* • Non-essential projects put on hold
Cookhouse	• Lockdown let to cut in sales • Focus on survival • Furlough	• First contact: November 2019 • One phone call and one 2-h meeting with VP Strategy • No further contact with the company at start of crisis • Refined research objectives • Limited research access granted	5 months	*Contact person* • VP has a Ph.D. in Strategy *Resource sensitivity* • Non-essential projects put on hold
Hopsbrew	• Not highly affected by crisis • Operations not limited by the lockdown	• First contact: May 2020 • Contact to the firm was brokered via business engagement department of city council • Business received project pitch and showed interest • Access granted	>1 month	*Third party involvement* • Contact brokered via city council *Contact person* • Open for exchange with research team *Local embeddedness* • Located in the city • MD interest in 'the place', that is, the city *Resource sensitivity* • Gradual approach to research access *Action scope* • Limited action scope *Research Fit* • Strong research fit
Sprinter	• High uncertainty about market development • Sharp shift towards e-commerce	• First contact: March 2020 • Several emails, conference calls and one personal face to face meeting • Access denied	2 months	*Local embeddedness* • Company is located near the city *Contact person* • Limited prior exposure to universities *Resource sensitivity* • Concerned by cost of interview time *Action scope* • Aversion to commit during crisis *Research fit* • Modest research fit
Streamline	• No substantial pressures • Ability to shift easily to remote work • Furlough	• First contact: June 2020 • Project pitch triggered interest • Video call with MD • Face to face meeting at premises • Access granted	>1 month	*Third party involvement* • Contact brokered via city council *Local embeddedness* • Located in the city *Contact person* • Open for exchange with research team *Research fit* • Strong research fit *Action scope* • Limited action scope

Table 3. continued Overview of findings

Case	Mid crisis situation	Overview of the negotiation process	Duration	Mechanisms of research access
Tier-One	• Furlough	• First contact: April 2020 • Initial contact: Executive Assistant of Board Member • Conference call with board member • Conversations with project lead • Access granted	3 months	*Local embeddedness* • Located in the city *Contact person* • Strong connection to university environment *Research fiit* • Strong research fit
Robo-Tecs	• Substantial pressures • Furlough • Government aids	• First contact: October 2019 • Two phone calls • Personal meeting with MD • Larger meeting with the extended management team • Access was granted	6 months	*Local embeddedness* • Located in the city *Contact person* • MD has academic background *Action scope* • Research scope changed with time *Research fit* • MD actively searched for research fit

Local embeddedness

Our analysis also suggests that the university's and companies' co-location within the same geographic space facilitates the establishment of research access. Especially in the sample setting, which includes local key players, the decision-makers appeared to be deeply connected with the local environment. They seemed to have a personal interest in engagement and fostering regional development. This was shown in the case of Sprinter and Tier-One. Sprinter rejected our initial research access due to reasons that will be explained in greater detail below. However, an email sent to the research team by one of the Vice Presidents of the company indicated a future willingness to collaborate, emphasizing their local embeddedness.

> 'I'm sorry that it didn't work this time, but [this city] […] is a small town and maybe our paths will cross at a later time. In the meantime, if you have any projects or talents that could somehow suit us, feel free to contact [my colleague] […] and me at any time'. (Email from Sprinter)

Additionally, we were contacted by an employee of Tier-One. He studied at the university and grew up in the area. Now, working for a large multinational firm, he wants to make use of his position to give back to the community. Based on the influence and network within the company, he actively searched for projects with a possible fit and introduced us to the top management team. Thus, we were able to successfully negotiate access for substantial data collection even though the company is under severe industry pressures and with a large number of employees on furlough. Also, the Managing Directors (MD) of Hopsbrew and Streamline both grew up in the area and now own well-established companies. Both want to intensify research access beyond the initial research and strengthen the bond with the research team.

The local embeddedness of the company played a crucial role in access negotiations during the crisis. It enabled cooperation between the university and companies located in the area, especially when the contact person had some form of connection to the environment.

Contact person

The most critical finding of establishing trust in our study is what we framed as 'contact persons'. Essentially, our findings suggest that not just the relationship but also the biographical characteristics of the contact person within the firm is crucial when trying to establish trust for research access. Especially the relationship between the contact person and the research team, as well as the educational background of the contact person are essential for research access negotiations across multiple cases. Here we found that the affinity to a research environment increases the probability of granting access despite difficult economic situations. For example, contact persons with PhDs were more open to engage in research projects. This is evident in the cases of Cookhouse and Robo-Tecs, where both contact persons held a Ph.D. These companies reached out voluntarily to participate in joint research. The MD of Robo-Tecs said the following in an email to the research team at the beginning of negotiations.

> 'From our side, a scientific examination of our situation and the development phases would be very valuable'. (Email from Robo-Tecs)

This underlines that contact persons who are affiliated with a research environment may actively seek to engage with research projects outside of their business environment. Although negotiations with B-Tech and Sprinter led to a negative result, the MD of B-Tech, who also holds a PhD, saw a great potential

of working with the university, despite turning it down because of cost pressures. The Vice-President of Sprinter, who worked all his life in the company and never engaged in a cooperation with a university before, showed a greater distance to research environments and therefore lacked the attitude portrayed by the MDs of Robo-Tec, B-Tech and Cookhouse. This becomes apparent through one of his emails, where he explained the access rejection:

'Here, however, it is important that we manage to answer or analyze specific questions from our company [...]'. (Email from Sprinter)

Despite an individual's relative distance to the world of academia, the contact person also plays a crucial role as a political supporter because their encouragement and internal network impact the access negotiations and, in a second step, the quality of data collected. These individuals evaluate the research fit, establish contacts with interviewees, and need to make sure that granting access does not send the wrong signal to the workforce that might feel anxious about the future of the company. The contact persons of Construct and Tier-One provided powerful examples supporting this argument.

The MD of Construct has a strong personal connection to the research team. This enabled access negotiations despite financial difficulties even prior to the crisis and initially granted access, which otherwise would have been hard to obtain since the company had already committed to a similar project. Furthermore, as a large multinational, Tier-One proved particularly hard to access during this period of crisis. However, our contact person saw it as a personal obligation to give back to the university and its local environment even under such harsh conditions. This enabled us to negotiate research access with Tier-One successfully.

By providing research access, contact persons make themselves vulnerable to the research team by opening up and sharing crucial information without the certainty of gaining an advantage. Hence trust is, in essence, a socio-psychological factor inherent in access negotiations as it involves the 'confidence in the reciprocity and sincerity' of the relationship (Dillon, 2010, p. 254). These findings suggest that the relationship to any contact persons and the focus on establishing trust are crucial for research access.

Influencing perceived value

In addition to the issues of establishing trust, the perceived value of a research project is a decisive factor for research access and does impact qualitative research access on multiple levels, such as scope and depth. Below, we highlight three criteria that need to be considered in order to increase the perceived value of a research project.

Resource sensitivity

Qualitative research often requires in-depth interviews, thereby demanding managers and employees in companies to invest valuable time. Depending on the positions and the number of interviewees, this constitutes a substantial cost for companies. Therefore, it is crucial in access negotiations to signal sensitivity for such resource constraints. During a crisis, this factor even intensifies because monetary pressures are higher than usual. The majority of firms included in our sample registered at least part of their workforce as part of Germany's furlough scheme to cut costs quickly. This caused a double constraint on human capital for qualitative research. As employees are trying to manage the crisis and juggle company and family commitments, interviews with academics are not prioritized. Moreover, managers are more sensitive about the extent to which they can expose themselves or their employees to additional tasks. However, this constraint does not automatically lead to a rejection of research access, as the case of Hopsbrew shows. Here research access was broken down into two steps. First, we interviewed the MD. Subsequently, we initiated a second access negotiation to interview more employees based on the findings in the first one. This led to successful follow up research access, expanding our numbers of interviews gradually while considering the current situation.

Thus, research sensitivity can be a dealbreaker for access negotiations. Even though the initial contacts with Cookhouse and Construct were promising, the beginning of the crisis caused an abrupt end to negotiations about access. However, after some time, the research team re-established contact by proposing a limited action scope and was granted research access. Also, Sprinters' rationale behind the rejection of research access drew, amongst other things, on the cost of working hours required for the project. This caused the firm to distance itself from cooperation.

'We have [...] identified several points, which led to the [rejection of research access][...] We cannot ignore the cost of working hours [...]'. (Email from Sprinter)

Resource sensitivity becomes even more apparent in the case of B-Tech, where the management team of the firm emphasized the strong research fit and action scope with the broader agenda inside the firm, resulting in a strong willingness for collaboration. Still, access was rejected due to resource constraints.

'After intensive discussion, however, we decided not to enter into cooperation right now due to cost issues. The reason for this is the current market development, to which we have to react with tougher austerity measures within the company and therefore do not start any new projects of this kind. The topic would have been very exciting for us, and I hope you understand'. (Email from B-Tech)

This quote highlights that managerial and employee time is highly precious, and management is anxious not to send the wrong signal to the workforce. In addition to time, cost pressures were the primary decision driver in access negotiations during the Covid-19 pandemic. Hence, conversations need to signal sensitivity for research constraints and help to influence the perceived value of qualitative research opposing the costs associated with it.

Action scope

Setting clear boundaries around the actors involved in a study increases transparency for the company and thus signals a give-and-take attitude crucial while negotiating access. Furthermore, qualitative research often requires staying in the field for a long time. When establishing access during situations of crisis, it might be necessary to signal the temporal boundedness of the project, which specifies an endpoint, yet with the option of extension. The research projects with Streamline and Hopsbrew have a more limited action scope than the ones with B-Tech, Construct, Sprinter, Tier-One, and Robo-Tecs. This enabled easy, quick, and successful access negotiations for interviews with the company. Here the interviewees seemed to welcome the opportunity to talk and engage with an external research team, despite or potentially even because of the ongoing crisis. As the case of Sprinter demonstrates, the action scope can also constrain the outcome of research access negotiations. Due to the pressures of the crisis, the proposed action scope was beyond their perceived capacities, which led to a decrease in the perceived value of the research project, thus triggering resource sensitivity issues and, in the end, rejection of access.

'The current crisis has also played a role; we can hardly assess the further development here and therefore want to make as few commitments as necessary towards external stakeholders'. (Sprinter)

In addition to that, Construct initially approved the proposed action scope, even though it interfered with another similar project with a different university. This was mainly due to the strong personal connection of the researcher to the contact person. However, with time, this led to constraints in research access when the crisis intensified, and the company cut down on project commitments due to firefighting and cost reductions. Nevertheless, limited research access at Construct was granted after all, mainly due to the personal connection between the research team and the contact person.

Even though the nature of the research topic often determines the action scope, the magnitude of it affects the perceived value of the collaboration, as it stands in close relation to the usage of resources. In some cases, it might be useful to

approach negotiations with a limited action scope and try to extend it afterward.

Research fit

We observed that the willingness to collaborate substantially depended on what we conceptualize as 'research fit'. Here the researcher has to focus on a fit between research objectives and organizational challenges. During a state of crisis, the focus is unusually high on the added value for the company. High uncertainty leads the firm to be more reluctant towards research project proposals that do not fully fit their current needs. The establishment of fit can be illustrated based on the negotiation journeys of Hopsbrew, Streamline, and Robo-Tecs.

As mentioned above, through our contact with the business engagement department of the city council, we were able to pitch our research project to several businesses. In the document sent to companies, we deliberately framed our research project by demonstrating its implications for management practice. The MDs of B-Tech, Hopsbrew and Streamline saw a fit with their current challenges, such as high pressures of organizational transformation, and were open to engage in interviews, despite the ongoing challenges due to the economic crisis. Additionally, a quote from the MD of Robo-Tecs shows that research fit, in this case, can be seen as a major driver for research access. He read about the research team in the newspaper and saw an initial fit between their academic focus and the ongoing challenges in the company. After a short period of exchange via email and introduction to the research project, his reaction displays an achieved research fit, which led to research access for a longitudinal study. 'The [research] topic […] just fits our situation perfectly'. (Email from Robo-Tecs)

On the other side, a lack of fit negatively impacts negotiations about access. Research projects – in most organizations – do not reflect everyday core activities of businesses and are amongst the first activities to be discontinued. Therefore, research access requires alignment with an organization's idiosyncratic situation in order to credibly ensure the added value of the engagement, as we observed in the case of Sprinter. Particularly during situations of crisis, companies face significant and unusual challenges as they aim to secure their core business activities. Our contact person was concerned that the intended research was not a perfect fit for the challenges Sprinter faces right now, resulting in the rejection of research access.

'Our digital transformation has actually been creeping in the background and in small projects for years and has never received this "label" [...] especially if the question is not 100% ours and we cannot assess whether the results would be used at all'. (Email from Sprinter)

Even though multiple factors were listed as reasons for non-cooperation in the case of Sprinter, this stood out as the main argument drawing on other reasons like economic uncertainty and cost issues leading to rejection of the research access. Regardless of the fit between the organizational setting and the research objectives, as far as the researcher is concerned, negotiations are not a one-way street. If they do not align with companies' current challenges, access might be hard to obtain.

We found that achieving research fit helped to mitigate the challenges imposed by the Covid-19 pandemic. However, this fit is not necessarily given from the outset, but may emerge in the course of the negotiation process due to the credibility of the researcher, and the situation of the organization. The perceived value of research projects significantly rises if there is an obvious alignment between research objectives and current organizational challenges. Especially in situations of crisis, this might accelerate the access for a project even more.

Conceptual interpretation and discussion

Our findings complement the existing methodology literature in three ways: (1) we identify two interrelated enabling conditions of research access and describe the activities that underpin those enablers and (2) from this derive implications for research access during crisis, as well as (3) more general implications for gaining research access (see also Figure 1).

Enabling conditions for research access

The purpose of this research was to investigate a crucial yet ill-understood aspect of qualitative research, that is the establishment of research access during situations of crisis. In the past 20 years, we have witnessed an increase in economic, social, and natural crises. These crises exert substantial pressure on individuals and organizations alike and thus very often form the backdrop for attempts to conduct qualitative research. While this article draws particularly on insights developed during the Covid-19 pandemic, we argue that the influences on research access revealed in our study may be relevant in any attempt to establish access.

Our findings show that establishing trust and influencing the perceived value of research are important enabling conditions for negotiating access in situations of crisis. We extend existing research by identifying six mechanisms that underpin trust-building in economically adverse situations, influencing the creation of perceived value of research. The critical awareness of these enabling conditions and the underlying mechanisms have great potential for increasing the chance of successful negotiations with organizations for collaborations. Furthermore, we found that trust and perceived value are not

mutually exclusive but may positively (or negatively) reinforce each other. For instance, resource sensitivity, action scope, and the establishment of research fit are very much influenced by the research team's counterpart in a particular organization. Even though our analysis was conducted against the background of the Covid-19 pandemic, the enabling conditions highlighted above are likely to be generally applicable.

Implications for research access during crisis

The trustful relationship between the research team and the organization is an important theme in extant methods' research and it is also evident in our analysis (Cunliffe & Alcadipani, 2016; Fox & Lundman, 1974; Mander, 1992). For example, in the cases of Construct and Cookhouse, initial access was denied due to the uncertainties faced in the first national lockdown. Only because of the trustful relationships with the research team, managers granted access after a second attempt to negotiate access. Thus, trustful relationships are crucial, but they are not sufficient for establishing access in situations of crisis. For instance, even though there was a prior connection and trust between Sprinter and the research team, access was denied due to severe constraints and uncertainty during the first national lockdown as the firm faced unprecedented operational strain and therefore wanted to burden its staff with as few commitments as possible.

Thus, our findings suggest that due to the severe constraints in terms of financial resources but also managerial attention (Ocasio, 1997), managers are often scared that committing to a research project sends the wrong signal to the staff. Crisis situations, in their multifaceted nature, constitute an inflection point that requires tough choices under severe time pressure (Bergman-Rosamond et al., 2020). This may involve decisions about redundancies or workers' pay. Thus, we argue that research access negotiations become a matter of legitimacy for the management team. These findings contribute to extant methods research by showing that the establishment of trust needs to go hand in hand with a situation-sensitive approach to demonstrating value.

The resource constraints and managerial challenges during crisis situations make the establishment of 'perceived value' a crucial enabler of research access: this refers to the value in terms of the research question to be explored and the demonstrated sensitivity regarding the time and other resources required. Indeed, in situations of crisis, organizations are often occupied with 'firefighting'. This has several implications for the research team, aiming to gain access. Firstly, due to environmental uncertainty and the unpredictability of events, a willingness for research collaborations might be limited in the first place. Secondly, and maybe more importantly, researchers need to be aware of possible research constraints, for

example, the project's scope and depth. Demonstrating this awareness in the course of negotiations and considering it in the initial research proposal positively affects research access. Once access is granted, the research team can increase the perceived value and nurture a trustful relationship, which can further extend the research access. These findings tie back to previous studies that have emphasized the need for transparency regarding resource requirements when building relationships with research partners (Peticca-Harris et al., 2016). However, and more importantly, our findings provide a more nuanced understanding of the establishment of research access in general.

General implications for research access

Extant methodology research on research access particularly emphasizes the situated and individual-level factors involved in the establishment of trust between the research team and members of the organization (Cunliffe & Alcadipani, 2016), such as informal relationships (Feldman et al., 2003) or the skill of the researchers (Mander, 1992).

Our research highlights two individual-level factors: the research distance of actors in the organization and the displayed flexibility of the research team. The extent to which actors in the organization are familiar with academia and the process of research seems to influence research access. For instance, in our sample, we saw that CEOs and Managing Directors who hold a Ph.D. degree have an intricate understanding of the research process and can more easily perceive the value of engaging in research. Moreover, in line with previous research (e.g., Peticca-Harris et al., 2016), our findings highlight the need for flexibility on the side of the research team with regard to the research methodology pursued. As qualitative researchers, we are being given the privilege to become part of a social setting, to build relationships, and potentially ask sensitive and intimate questions about the life and behavior of people in organizations. With this privilege comes responsibility. Our intention as qualitative researchers can and should not be to exploit organizations that provide us with access. Consequently, we have to be mindful of the activity scope of the projects pursued, as well as the duration of any data collection. Indeed, the maintenance of preexisting relationships between the research team and organizations becomes a crucial component for establishing trust and ensuring future access (Morgan, 2009). For example, personal relationships of the research team to the managing directors of Cookhouse and Construct provided initial trust. Nevertheless, it was only after refining the action scope that we were able to agree to limited research access. Hereby, we can clearly see that the researcher represents a crucial boundary condition for research access negotiations.

Yet, more importantly, our findings complement extant research by showing how the establishment of trust is not just influenced by interpersonal aspects as mentioned above but also by the organization level context within which such access negotiations happen. Indeed, we show that companies' 'local embeddedness' influences the ability to build such relationships. We use the term embeddedness to describe an organization's linkages to a particular geographic region, such as a city or county, which involves a sense of responsibility of managers that goes beyond the firm and also includes the future development of the context in which the organization operates. We consider embeddedness to be an important theme for future research on research access but research collaborations more generally (Jack, 2005; Jack & Anderson, 2002).

Both research distance and flexibility on the level of the individual actors as well as the local embeddedness of the organization have important implications for establishing research access; and they might be particularly relevant for scholars without an 'individual' network to build on. Our findings suggest that researchers may want to look out for well-established companies in geographic vicinity to the university who might feel this sense of responsibility and are willing to support research projects, despite difficult economic times, as well as managers with strong research affiliations.

Conclusion

The Covid-19 pandemic will leave an imprint in the fabric of social life. Qualitative researchers, who are dependent on building close relationships for the conduct of fieldwork, are going to be substantially affected: either because of a lack of access due to economic circumstances or because organizations' effort to deal with the fallout of the pandemic potentially stymies initiatives (such as digital transformation, etc.) that might have formed the context for qualitative research. The latter potentially implies a narrowing of research opportunities. The former is going to be an inevitable 'artifact' in any data set collected during the pandemic. Indeed, when conducting the Hawthorne studies, the team decided to partly discount interviews conducted during the great depression as the socio-economic situation affected the types of observations they sought to make (Roethlisberger & Dickson, 1939). We should not hold back such evidence. Management and organization research has the opportunity to make the effects of such a substantial crisis visible and, therefore, usable for generations of researchers to come.

By investigating research access negotiations during crisis, our findings confirm prior research on research access. However, we conclude that our findings do not solely apply to situations of crisis, but assume they might be applicable to any attempt of negotiating access. Indeed, we argue that the issues of access come to the fore, particularly under tough circumstances. But we cannot make any statements about the

contingency of access negotiation processes on the wider so-cio-economic conditions, as we only draw on data collected at the beginning of the Covid-19 pandemic. This represents a limitation and calls for more research.

The conduct of qualitative research, like any type of research for that matter, is both about theory and craft. By focusing on the negotiation of research access, this article is about the latter. Usually buried in the methods sections and is rarely problematized (Bell & Willmott, 2020), we believe that negotiating access for qualitative research is a craft and learning a craft requires practice. By reflecting on the establishment of research access during the Covid-19 pandemic, this article aims to support researchers in their own research projects: by raising awareness of the enabling conditions that mitigate potentially adverse environmental constraints, but also by providing situated accounts and vignettes of particular instances of access negotiations. Both are hopefully useful devices as researchers prepare to negotiate access.

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