An inductive methodological process of global comparison: observing, describing, interpreting, modeling, abstracting, and transposing to a new topic

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Introduction

It is well to remember that globalization is not a new phenomenon. It started with Homo sapiens who left Africa to cross Asia and ended up in America. "Cosmopolitism" has always existed in one form or another. To say this is to avoid essentializing it from the point of view of one culture which is especially important when conducting international comparative studies.

Globalization has also functioned intermittently if we think of America, without contact with Eurasia until the 15th century, whereas it represents a relatively continuous phenomenon if we refer to Eurasia and the silk roads, at least since the fourth or third century before our era. Perhaps, we are now, in 2022, on the eve of a new contraction of globalization associated with new wars not only with Russia but also between the United States and China, not to mention inflation and global warming.

I would like to show below how I have been developing a mobile knowledge that varies according to the scale of observation following qualitative surveys in France, Africa, China, the United States, Brazil, and Europe.

International comparison requires us to seek both the social mechanisms that are comparable, i.e. what is permanent, and at the same time what is specific to each social phenomenon observed, i.e. the contingencies of history and of human organizations, what is unpredictable.

The main conclusion is that my method of observation depends on the situation in which the researcher is involved[1]. The observation changes according to the changes of the globalization that affects the society or the social group on which the research is carried out. This shows that science is not based on a single model but on several methodological patterns. Some of these models are out of the situation and look for regularities or laws, others are in the situation and try

[1] Mark Neumann, 1999, *On The Rim: Looking For The Grand Canyon*, University of Minnesota Press; It is a remarkable book by the diversity of its methods of investigation and the quality of its narrative.

to understand the system of biological, human, technical objects, economic or symbolic action. In this chapter it is this second model that is mobilized.

Understanding what is at stake when comparing different cultures: how the behavior of social actors is partly organized by the constraints of their ecological, social, and political environment.

One of the central issues of globalization, but not the only one, is the power relations between social groups and countries, one of the main constraints which weight on the behavior of actors. The objective of my research is often to understand who is controlling the flows of raw materials, energy, viruses, information, goods, culture, and people within globalization. An interesting example is given by the investigation by Vincenzo Cicchelli and Sylvie Octobre on the diffusion of K-pop, the Korean popular culture, the spread of which can serve as a medium for forms of political protest, particularly in the US against Donald Trump (p. 284). [2]

It is an historical and old question, that of empires and spheres of influence between "centers" and "peripheries." Therefore, the question of wars and arm force innovations is at the heart of the transformations of societies. It is itself directly associated with the question of trade, the security of commercial routes and means of transport. This means that mobility is at the heart of globalization and therefore that the control of energy is the major issue in international relations since camels, horses, donkeys, boats under sail or with rowers yesterday, or trains, container ships and airplanes today. Mobility depends in turn on the nature of the available energies with humans, animals and natural bio energies, fossil fuels and industrial energies.

These spheres are themselves embedded in ecosystems of steps, rivers or mountains that explain the conquests, submissions, and different forms of irredentists all along history, such as that of the Christians in the different mountains from the Armenians in the north of the Middle East to the Ethiopians in the south of the Red Sea.

The forms of power depend themselves on climatic variations, whether for the Roman Empire which benefited from a climatic optimum between minus 100 BCE to year 200 CE, before the arrival of a small ice age around the 6th century CE, which signs the end of the western part of the Empire, as the climate historian Kyle Harper reminds us.[3]

For a long time, globalization has been regularly questioned according to whether its effects threaten or strengthen the position of this or that country, or this or that social group. In a simple and obvious way, this means that the groups that gain are more favorable to globalization than those that lose. Today globalization threatens or favors everyone because global warming, viruses, military missiles, currency crises, culture or energy circuits do not have many borders.

All this seems obvious today since the Covid crisis which started in 2020, the logistic crisis which began in 2021 and the war in Ukraine which broke out in 2022. It means the social actors are under strong diverse constraints and their margin for maneuver is narrowing.

[2] Vincenzo Cicchelli, Sylvie Octobre, 2022, *K-POP. Soft power et Culture globale,* PUF

[3] Harper Kyle, 2017, *The Fate of Rome*, Princeton University Press (2019, French Translation)

However, it is because it seems obvious that we must be wary of it and that we must constantly change the way we observe reality thanks to a mobile knowledge that constantly shifts the angles of observation either according to the scales of observation, or according to the diversity of professions or disciplines. From an anthropological point of view, the future is becoming a new "exotic world," a new unknown continent.

I will now try to synthesize the epistemological lessons I have learned from all the comparative and qualitative investigations I have conducted with many teams of researchers, most of them under contract with NGO, public or private organizations, over the past decade[4]. I first studied big organizations in France, then agrarian societies in sub–Saharan Africa, then the consumption of the global middle class in the US, China, Brazil and Europe since 1990 and then the effects of the global crisis on the changes of societies since 2020.

My objective is not to say that qualitative approaches are the best method. That depends on the historical situation. In times of great uncertainty, such as today, inductive exploratory methods are more appropriate than statistical methods. It is also to show that there is a rigor in qualitative research and that it is therefore possible to avoid the traps of the comparative method.

The enigma of observation scales: the "mobile knowledge"[5]

The mobile way of observing reality raises some unexpected epistemological questions. The first is the "observation dependence" at the angle of observation which means the "decoupage" of the reality. There are no qualitative observations without "decoupage," and therefore it is impossible to avoid the bias of observation. There is no observation without "bias." The second is about the variability of the causal system of explanation.

What Is Observed at One Scale Disappears at Another Observation Scale

The division of reality is relatively easy to accept from an empirical point of view. It refers to the differences between disciplines, professions, or daily life experiences. In the world of humanities, it is easier to accept today than in the 1980s. When a survey is conducted on a macro-social scale, it is often observed the four main great social cleavages of social classes, genders, generations, and ethnic, religious, and political cultures. However, at this scale, the interplay of social actors is nearly invisible as well as the individual person, and even more so the neurons, the chromosomes, and the genes which are also supposed to organize a part of human behaviors.

The main epistemological conclusion is what is observed at one scale disappear of the observation when observed at another scale. Changing the angle of observation, that is doing a" decoupage" within the reality, changes the content of the observation. It is not possible to observe at once geopolitics, social classes, play of social actors in organizations or families, the individual, and the genes. It is impossible to have a global view at once of what is found at all scales of

[4] Desjeux Dominique, 2018, *The anthropological perspective of the world. The inductive method illustrated*, Peter land

[5] Desjeux Dominique, 2022, *Scales of Observation*, Oxford Research Encyclopedia, Oxford University Press, https://doi.org/10.1093/acrefore/9780190854584.013.120

observation. It is not because the logic of genes or neurons is understood that we will know better the logic of social classes.

This implies to accept that the observation of reality is discontinuous what means an independent variable could become a dependent variable when observed at another scale. For example, it is possible to observe a link between social classes and food behavior, but it doesn't work when explaining an individual behavior or the decision-making process of buying food. It doesn't mean the social class has no effect, but it becomes invisible to observe and prove. It means that it is mandatory to change our focal length throughout the various scales of observation to avoid some important blind spots, weak signals or high regularities. But it is impossible to know before launching a study what would be the best scale of observation. It is requested to move and change the focal length.

All these nonconformist conclusions mean that the scientificity of qualitative studies is not based on the same rules as experimental sciences and quantitative surveys. This indicates that there are several kinds of sciences which is an old controversy. It becomes more obvious when accepting the scales of observation approach.

The diversity of observation scales and the moving causality: from the "correlation effect" to the "situational effect."

What is more complicated to accept is that the nature of causality evolves depending on the chosen scale of observation.

Causality can be the result of a correlation effect, as in macrosociology or macroeconomics, or in the experimental sciences and at a micro-individual scale of observation, i.e. for all approaches that seek regularities or laws outside the ground and outside the situation. It is known that correlation is not causality, but there is no causality without correlation. Causality is a strong correlation or a range of correlations independent of the situations, and of the play of social actors.

In qualitative method, mainly at meso-social and micro-social interactionist scales, causality is induced by a "situational effect" and by the games of social actors under material, social, and symbolic constraints. It is mobilized in the analysis of organizational or family unit, and more generally in approaches that describe social reality as a system of action. Therefore, an independent explanatory variable at a given scale of observation, found thanks to a strong correlation, becomes a dependent variable of a situation when focusing on the games of actors.

At this scale of observation, we show the interplay between the forces that govern us (climate, viruses, geographic spaces, logistics) and the room for maneuver of the actors, i.e. the uncertain interaction between determinism and voluntarism.

At a micro-individual scale of observation "correlation effect" could be used when mobilizing experimental research. Very often it is hard to distinguish between the micro-social and the micro-individual levels. For those that focus on values, identity or meaning the boundaries between scales are more blurred. The most important difference is between

observations that focus on the situation and those that focus on statistical correlation. For those that focus on values or meaning, the boundaries are fuzzier.

At the opposite of quantitative method which needs a problematic, a state of art and hypothesis, this approach is inductive. It is not known where we are, where we are going to. We are lost in an "exotic" country without any landmarks. It is because there is no point of reference that the temptation is strong to mobilize a priori concepts and hypotheses when the concrete situation is unknown. The danger is to consider these concepts as valid essences whatever the human situation is, even if it will be possible to show at the end of the investigation, inductively, that there are both human regularities and diversities across cultures and centuries.

Avoiding the essentialist and culturalist traps of the international and intercultural comparative method: the inductive method, observing, describing, and interpreting in a single process.

One of the ways of escaping the a priori essentialization that prevents us from seeing differences and similarities at the same time, and thus to be able to compare, is to adopt an inductive method[6]. But this method often has a poor reputation because it doesn't mainly focus on authors and schools of thought. In addition, most of my field studies are requested and financed by social actors, mainly private companies, public organizations, and NGOs which has a worse reputation! It is a Research On Demand (ROD).[7]

The strength of the ROD: learning by being asked to carry out various field studies

The most interesting benefit of the ROD is that the topic of the field study is not decided by the researcher. He or she must change is mind at each enigma. It becomes the most powerful tool to learn the mobile knowledge because the researcher is confronted with multiple issues but remains in charge of the method and the way to answer the question. This mobile confrontation with the diversity of social reality limits the establishment of an essentialist and stable vision. Essentialism is often associated with a single scale of observation and a single theoretical model that is supposed to explain everything in a global and consistent way from individual to social classes, whereas life is made of many contradictions and tensions and therefore of discrepancies and ambivalence. Essentializing is a way to get rid of these contradictions[8]. We must not forget that a paranoid thought is coherent and therefore that logical coherence is not always a proof of truth.

[6] Induction is also known as abduction, Russell Belk, Rana Sobh, "No assemblage required: On pursuing original consumer culture theory", *Marketing Theory*, Sage, Volume: 19 issue: 4, page(s): 489-507. Article first published online: November 9, 2018; Issue published: December 1, 2019 https://doi.org/10.1177/1470593118809800

[7] See Dominique Desjeux, 2014, "Professional Anthropology &Training in France", in Rita Denny and Patricia Sunderland, *Handbook of Anthropology in Business*, Left Coast Press, California, pp 100–115

[8] A good example of the interest of this mobile method is the work of Vincenzo Cicchelli, Sylvie Octobre, 2022, *K-POP. Soft power et Culture globale,* PUF, p.30, p. 279

Most often, I am asked to shed light on a social situation to understand the conditions of the diffusion of a new product or service into the Chinese market, for instance; why a new technology does or does not spread to farmers in Sub-Saharan African countries; how to change the way a large company operates in China, France, the US and Brazil; why families do not follow the doctor's prescription in China, Algeria, Egypt, and China; how the homeless can reintegrate into a working life in France; what the link is between disabled people and consumption in France; how to transform consumption into a more sustainable consumption, and so on.

I am requested to solve an enigma which is how social actors do or do not act. My main answer is to explain the material, social and symbolic constraints that organize the behavior of individuals and groups which means that they are less manipulable than brand marketers, sociologists only focus on the domination explanation, and anti-consumer activists think. Seeking to solve a human enigma requires using "descriptive concepts" because the aim is pragmatic. It is most often design in the form of a system of actions, objects, or beliefs. It means that when one element moves the whole system evolves. This approach works at the meso and micro-social scales of observation.

The strong link between descriptive concepts and inductive method:

A descriptive concept fits with reality. For instance, if I work on the political organization of a society I can start with the concept of State, which is a very abstract word and so very often an ideological word full of value judgments in favor or against the State. I can shift from the abstract concept of State to the one of "bureaucracy," as Max Weber did. It is more concrete. M. Weber describes the main features of a bureaucratic system, such as "impersonal rules"; "promotion by seniority"; there are no concrete social actors. I can then shift to a more concrete concept of organization of a public administration or department to describe the "social interplay of the civil servants" based on power relationships and social networks. The functioning of an organization is the "descriptive concept" of State.

Thanks to my qualitative study on a small village in South Congo in the 1970s, I also discovered the three main levels of social life, based on three "descriptive concepts" linked to three kinds of constraints: the "material culture" based on the agricultural itinerary of cassava; the "social relationships" between men and women, old and young people and among members of families made of power relationships, cooperation and building of identity; the "imaginary" or symbolic level with "witchcraft" and "sorcery". Witchcraft is a way to explain the difficult times of daily life and so to give a meaning to life. Later I transposed this dimension to deciphering advertising as an animist process (see below). I have transposed these three sets of concepts material, social, and symbolic constraints to a large number of situations such as consumption, innovation and decision-making processes in organizations, households, or open social systems of action.

Explaining the "why?" by the descriptive "how" constraints.

The interplay of actors that contributes to the functioning of the organization, the market, the family or the village, is the concrete enigma to be solved, which requires "grounded" and "thick" descriptions. Describing also means to begin interpreting because describing means to decipher "how" a social phenomenon works and "how" in this method means inductively under constraint. To play on words the "how" is the "why?" The constraint becomes the explanatory cause and therefore the "why?" of the collective action at this micro or meso-scale of observation. The constraint is ambivalent, at the same time brake and potentiality of the change in society. Observing and describing is at the heart of the inductive method[9].

Inductive theorizing means describing in contrast to approaches that start from authors, concepts or a priori hypotheses. Paradoxically, neither method is better than the other. They are two approaches to reality whose choice depends on the constraints of observation, information gathering, and problems to be solved. Everyone knows that it is difficult to carry out a quantitative investigation without making hypothesis, otherwise one will end up with a magma of information to process. This is the problem that the processing of "big data" faces.

The Main Tools of the Inductive Method

Inductive means launching a qualitative field study without knowing where to go and how social actors deal with the problem we are asked to clarify. We are like a western navigator of the 16th century discovering a new world. He only has three tools: a compass to know where the north is; a sextant to calculate his position; a lead line to measure the depth of the water and so avoid rocks. And he has one methodological hypothesis that is the rotundity of the earth … but without any certainty when going west.

I have four main tools of navigation to describe a social reality as a system. As a reminder, the first is the scales of observation (equivalent to "lens," scope and "decoupage"). The content of reality changes when changing of scale of observation. The causality changes according to the scale. The second is the itinerary method in which decisions are observed as a collective process. The third one is the observation of qualitative life cycles which describes the construction of social identity. The last is the open system of action method. It is tried to discover the social actors involved in the process of innovation, change, and decision.

These are the mental frameworks I have in my mind when discovering a new reality. But I have no hypothesis about any link between one phenomenon with another. I only know it is impossible to observe a social reality all at once. I must make "slices" ("decoupage") within reality. There is no holistic field study from genes to geopolitics. Most important, I make a distinction between practices and representations, because there is a big gap between these two parts of the social reality which is mainly explained by the constraints of the situation.

[9] Dominique Desjeux, 2018, "Innovating by Observing", https://youtube.com/playlist?list=PLcVzdQDNiAy0D_XmthX0gjsWdCbvxVkn7&si=wPUVb3otTymJLyNT

In a nutshell, induction means giving great importance on observation and interviewing social actors to understand their practices, the goal and interest they have, and the meaning they give to them, then designing all this information in the form of systems, structures, weak signals, or processes. That allows us to build descriptive concepts abstracted from the description. This requires avoiding the use of abstract concepts when describing reality and therefore looking for the simplest possible words that describe the phenomenon while removing as much theoretical connotation as possible.

The Process of Transposition

After describing, it is possible to generalize in a more abstract way to be able to transpose what I have learned by observing in one country or one topic to another country or field. This is for example what I tried to do by transposing what I understood by observing the processes of invention, diffusion and then reception of a new agricultural, medical or digital technologies, to the process of diffusion of Jewish and then Christian monotheism all around the Mediterranean from 1000 BCE to 500 CE[10].

This means that to apply the inductive method it is necessary to have in mind numerous descriptions of realities belonging to very different fields. It is comparable with a game of chess strategy. A player needs both to have many combinations in mind and be able to move his or her pawns depending on the situation. The main difference is that a chessboard is closed while social life is an open game and players don't have the same resources.

Another example of transposition is drawn from a classical field study in the world of the sociology of organizations[11]. The case was built by Michel Crozier in the 1960s. He showed that the power was not a possession of the actors but that it was linked to a social interaction in a specific situation, that of a zone of uncertainty. This uncertainty was linked, in his investigation, to the breakdown of the machines of a big company, and thus that power was controlled by those who could repair these machines and not by the official hierarchy. The uncertainty is that no one can foresee when the breakdown will occur.

In the Congolese Village I was studying in the 1970s, I had to consider an "exotic" issue which was "witchcraft." At the beginning I didn't want to take it into account because I felt it was too far from my own "rationality." But after a while, I discovered that this magic-religious device was at the heart of power relationships between young and old people around a zone of uncertainty related to illness, death, or accident. The power to make young people or women do something was held by lineage leaders who were supposed to threaten them with a spell and thus death or illness in case of conflict. It means that the family leaders were supposed to protect against the uncertainty of life.

[10] Dominique Desjeux, 2024, *The market of The Gods. How religious innovations emerge from Judaism to Christianity*, Peter Lang

[11] Michel Crozier, 1964, *The* bureaucratic phenomenon, Chicago, University of Chicago Press

The transposition was made from the abstract pattern which shows that power is not only a possession but also a social interaction linked to the control of an area of uncertainty by some specific social actors what works in many social situations. The only difference is that power depends on a symbolic expertise in Congo, on a belief, but not on a technological skill. The pattern is universal, but the shape is specific to each culture. When the uncertainty changes, the power relationships also change. That is why there is no stable essence of the cultural shape. However, the stability of the abstract pattern allowed to make comparisons.

It is the same method which was used by Vincenzo Cicchelli and Sylvie Octobre in their book about the reception of Korean culture (K-Pop ou *Hallyu*) in France. They have an abstract pattern about the construction of identity as a process that takes place during the life cycle from childhood to youth, to adulthood. Everyone needs resources to build his or her identity. They transposed it to their new study. They showed that K-Pok was used as a resource in the identity building of three groups of youths. Learning the Korean language, for example, is a way to broaden the horizons of young people with poor schooling or foreign backgrounds. For the middle class, K-pop plays a role in guiding them through the school puzzle. For those with higher educational capital, *Hallyu* is an additional means to get the best education. They have an abstract life cycle pattern of explanation that they can transpose to interpret the reception of *Hallyu*. In addition to this, their book explains how the Korean government has organized the supply of this reception, and how the establishment of social networks and infrastructure play an important role in the diffusion of a novelty[12].

I would like to finish with a transposition from "animism," embedded in many "exotic" cultures, to advertising which is at the heart of our "modern" culture. Advertising is inspired by both Catholic transubstantiation and animism. From animism he draws the idea of incorporation of a soul, of an energy that would be contained in the consumer goods. The advertising promises in the imaginary, the youth, the social link, the greening of the goods… Buying a product means appropriating its energy, its soul. From transubstantiation, it offers the possibility of transforming an ordinary product into a person to whom one must be loyal, the brand.

Five Principles to Carry Out Rigorous Comparative Qualitative Field Studies

A qualitative field study is based on induction, as a means of exploring reality without making hypothesis other than methodological hypotheses. Thanks to the inductive method, I assume there are material, social and symbolic constraints which organize the behavior of actors as well as the effects of life cycles or the interplay among social actors. It is also assumed there is a gap between representations and practices. Eventually, the decisions are the effect of a collective process over time and not a single moment, at least at the micro-social and meso-social scales of observation.

[12] Vincenzo Cicchelli, Sylvie Octobre, 2022, *K-POP. Soft power et Culture globale,* PUF, pp 272 and sq.

The second principle is ambivalence. It is postulated that reality contains a negative side and a positive side, and they are inextricably linked.

The third is the ability to generalize the diversity of usages according to their occurrence which generally varies between 2 and 5. It means that interpretation in terms of frequency is impossible, which would not make any sense for small qualitative samples. A practice observed once is as valuable as a practice observed 10 times, and sometimes even more if it is the sign of a weak signal which is currently emerging. It is also possible to generalize social mechanisms or cultural models, but without concluding anything in terms of frequency, which would be the task of a quantitative investigation.

The fourth is to adopt a comprehensive approach, without value judgments or accusations. It means that the point of view of the actors are taken as a point of departure to understand their practices and the sense they give to them, to display the underlying social mechanisms which are beyond the actors' mere perceptions or experiences. It is more a process of objectivation than an objective process because the researcher is part of the observation.

The fifth is a principle of symmetry with respect to the effectiveness or ineffectiveness of an action. An action which is ineffective is as interesting to observe as one which is effective. We postulate that a quantitative frequency is not truer than the diversity of occurrences, but that it teaches us something else.

Conclusion

The main characteristic of an international study is that the phenomenon analyzed in another culture is completely unknown to the researcher. He has no landmarks so he must describe making appear this unknown reality embedded in an unknown language. Practices in daily life are the easiest phenomenon to describe because it is visible and concrete. Words are simple. Discovering the meaning of life through values and representation requires more time. Little by little I discovered that describing is a system, and that describing a system is interpreting, as demonstrated in practice by Bronislaw Malinowski in his seminal book, *Argonauts of the Western Pacific* (1922)[13]. The use of induction is linked to the need to describe. The discovery of induction was born from the constraint of understanding exotic grounds.

This constraint has led to the implementation of comparative tools such as the itinerary method and the life cycle method and then the scales of observation method. Its principle is there is no observation without a decoupage of reality and so theory depends on this decoupage.

[13] Dominique Desjeux, 2017, "Bronislaw Malinowski, or the Elementary Material and Symbolic Forms of Production, Exchange and Consumption", *in* Soren Askegaard, Benoit Heilbrunn (eds.), *Canonical Authors in Consumption Theory*, Routledge

The inductive method can be described as a process of discovering a cosmopolitan reality. The first objective of a qualitative field study is to discover what is true, but not what The Truth is. So gathering information is the most important step. It is asked to people what their practices and meanings are. The quality of information ensures the truthfulness of the field study. Truth is then discovered in describing the reality drawn from observation and discussions with "subjects."

Whether a study is qualitatively based on interviews or quantitative based on questionnaires, information is always gathered from an individual. This "subjective phase" allows transforming a "concrete subject" into the "descriptive concept" that is of a "social actor," or concrete daily life into a "system of action."

This "objectivation" is based on a process of "abstraction". It is a cognitive mechanism which is included within the description when describing social reality as a set of systems, a social structure, a process of identity building, a meaning of life or a correlation. "Objectivation" means that objectivity is impossible in anthropological study because there are many links between the observer and the social group observed.

Thanks to the first transformation/abstraction of an individual into a social actor, the social reality can be read as a system of action, as a system of concrete interactions based on power relationships organized around an "area of uncertainty" all along an itinerary process of decision-making working under material, social and imagination constraints.

And so, it is possible to transpose these "descriptive concepts" of social actors, systems of action, and so on from one field to the world of organizations, to the world of small farmers in Congo, and then to that of families and consumption in the modern world in France, the US, China, Brazil, Denmark, and so on…

One main point is the constraints of "*decoupage*," which leads to the disruptive conclusion that is there is no overall theory but only "limited generalizations." There are only theories fitting with the scale of observation based on gathered data.

As a mobile method, it is, of course, possible to utilize some patterns of interpretation from other scales of observation to clarify our data, but not in a chain of causality because the process of information is discontinuous. It is an inclusive epistemology but not a merging method. Each theory has its own relevance which depends on its scale of observation. And so, one solution to our methodological enigma is to search at what scale of observation each concept or pattern of interpretation, has been produced to find how it is relevant to answer the initial question of the study. Finally, the theory is the result of a permanent back and forth between description, modeling and transposition, that is an inductive method.

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