



Qualitative Research in Education: Philosophical Foundations, Methodological Challenges, and Applications

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Abstract

Background and Aim: Qualitative research has become essential in educational inquiry as it reveals the complexity and contextual nature of teaching and learning. It is fundamentally rooted in interpretivist, constructivist, critical, and postmodern paradigms, emphasizing meaning-making and the social construction of reality. Despite its increasing acceptance, qualitative research faces challenges related to philosophical debates, methodological rigor, and practical relevance. The study aims to examine the philosophical foundations, paradigms, applications, and challenges of qualitative research in education.

Materials and Methods: The study employed a literature review as a research design. For this, the journal articles and seminal theoretical books were purposively selected based on relevance, recency, and availability for review. The review materials were collected purposively using databases such as Google Scholar, ResearchGate, Academia.edu, ProQuest, and Semantic Scholar. The collected materials were read thoroughly and recursively. Through constant comparison and conceptual abstraction, themes were developed and analyzed.

Results: By analyzing peer-reviewed articles and key theoretical works, the study highlights crucial ontological, epistemological, and methodological assumptions. The findings suggest that qualitative research is essential for comprehending classroom dynamics, teacher and learner identities, curriculum implementation, and issues of equity and policy. However, challenges such as researcher positionality, trustworthiness, and ethical responsibility persist. The study argues that these challenges are not methodological weaknesses but inherent to qualitative inquiry. Consequently, it contributes to a deeper understanding of the relevance of qualitative research in producing ethically grounded and context-sensitive educational knowledge.

Conclusion: This study affirms qualitative research as a rigorous, socially situated approach rooted in interpretivist and critical traditions. It captures meanings, identities, and educational processes often missed by quantitative methods. Methodological challenges strengthen the approach when addressed reflexively. Overall, it remains essential for theory, policy, and socially responsive educational practice.

Keywords: Constructivism, Interpretivism, Educational Inquiry, Paradigm, Trustworthiness

Introduction

Research is fundamentally defined as a systematic, scientific, and rigorous study of phenomena that aims to gain knowledge. It is generally problem-oriented and defined as a systematic method of finding solutions to problems. Additionally, research is defined as a studious inquiry that involves the collection, generation, and analysis of data, which is necessary to solve a problem (Cohen et al., 2018). Qualitative research is a type of research that is based on an interpretative research paradigm, and believes in subjectivity and multiple realities, thick description, descriptive in nature using non-numerical data, and tries to explore the experience and perspectives of individuals in the phenomena (Denzin & Lincoln, 2005). Contemporary qualitative research has been influenced by several philosophical world views, such as positivism, post-positivism, critical theory, and constructivism (Guba & Lincoln, 2005). Qualitative education research represents a diverse and dynamic paradigm dedicated to understanding the complex, nuanced, and lived experiences of individuals within educational contexts. Unlike its quantitative counterpart, which seeks to measure, predict, and generalize through numerical data (Rauteda, 2025a), qualitative inquiry is fundamentally concerned with meaning, interpretation, and the social construction of reality in schools, universities, and other learning environments (Denzin & Lincoln, 2018). Its primary aim is to delve into the "how" and "why" of educational phenomena—exploring the processes, interactions, beliefs, and cultures that define pedagogical practice and policy. This methodological approach is not merely a set of techniques but is inextricably rooted in distinct philosophical traditions that shape every aspect of the research process, from the formulation of questions to the presentation of findings.





Despite its established value in generating rich, contextual insights, qualitative education research continues to navigate significant philosophical tensions, methodological challenges, and ongoing debates about its rigour, validity, and utility in influencing policy and practice (Sinclair, 2025). Regarding its trustworthiness, Lincoln and Guba (1985) state the criteria, such as credibility, transferability, dependability, and confirmability, for its maintenance. Yet, debates persist. The question of how to establish the credibility of an interpretive account without retreating to objectivist standards remains a point of scholarly contention (Tracy, 2010). Similarly, the principle of transferability—the potential for findings to resonate in other contexts—contrasts sharply with quantitative generalizability, requiring thick description to allow readers to judge applicability. The researcher's positionality and reflexivity constitute another critical challenge. Qualitative research acknowledges the researcher as the primary instrument of data collection and analysis, making it imperative to critically examine how one's own social identity, biases, and assumptions shape the inquiry (Pillow, 2003). This reflexive practice is both a strength and a source of complexity, demanding a rigorous, ongoing interrogation of the research relationship.

Moreover, ethical considerations in qualitative educational research also extend beyond procedural review boards to permeate the entire research process. Issues of informed consent, confidentiality, and anonymity become particularly complex in longitudinal studies within close-knit educational communities (Mertens, 2020). The ethical imperative is amplified in research with vulnerable populations, such as young children, students with disabilities, or marginalized communities, where power differentials are pronounced. The ethical duty often extends to a commitment to reciprocity and ensuring that the research benefits participants in some meaningful way, aligning with critical and participatory approaches that seek to democratize the research process (Denzin & Lincoln, 2018).

Despite these challenges, the applications of qualitative education research are vast and vital. It is indispensable for exploring complex, process-oriented questions related to curriculum, policy implementation, teacher identities, students' psychology and behavior, micropolitics of schools, students and teachers' experiences, and the complexities of classroom dialogues (Aryal, 2024). Moreover, these kinds of educational phenomena are hardly explored using a quantitative research approach as educational issues are diverse, complex, and dynamic (Rauteda, 2025a). In the realm of education, while qualitative evidence is sometimes marginalized in favour of statistical data, its power lies in providing contextual, explanatory depth that can humanize statistics and reveal the unintended consequences of policy decisions (Sinclair, 2025; Yanow & Schwartz-Shea, 2014).

Despite the growing recognition of qualitative education research, there remains a lack of conceptual coherence in how qualitative research is understood and applied within educational research. The philosophical foundations, methodological challenges, and practical applications of qualitative inquiry are frequently treated as discrete domains rather than interconnected components of a unified process (Creswell & Poth, 2018). This fragmentation leads to a "methodological congruency" crisis, where research designs lack the internal logic necessary for rigorous inquiry. Moreover, in complex educational settings, this fragmentation limits the "translatability" of qualitative findings, leaving a significant gap between theoretical knowledge and its practical application in diverse classrooms (Tracy, 2010). Addressing this gap, the present study develops a guiding framework that integrates three key dimensions of qualitative education research: philosophical foundations, methodological challenges, and ethical and practical applications. Thus, this study analyzes and describes the philosophical foundations, methodological challenges, and highlights the applications of qualitative research in the field of education. Moreover, the study attempts to answer the following research questions;

- a) What are the philosophical foundations and guiding paradigms of qualitative education research?
- b) What are the key methodological challenges and practical applications of qualitative research in educational contexts?



Conceptual Framework

The conceptual framework synthesizes the philosophical, paradigmatic, and methodological aspects of qualitative education research, as revealed by the literature. It highlights how ontological, epistemological, and axiological assumptions—rooted in interpretivist, constructivist, critical, and postmodern traditions—shape qualitative inquiry. These orientations guide the selection of research paradigms, influencing data generation, analysis, and knowledge construction. The framework also emphasizes key educational applications, such as classroom practices and equity issues, while addressing methodological challenges like researcher positionality, rigor, ethical complexities, and context-specificity. Central principles of reflexivity and ethical engagement are underscored to enhance coherence and credibility in qualitative educational research.

Figure 1: Conceptual Framework

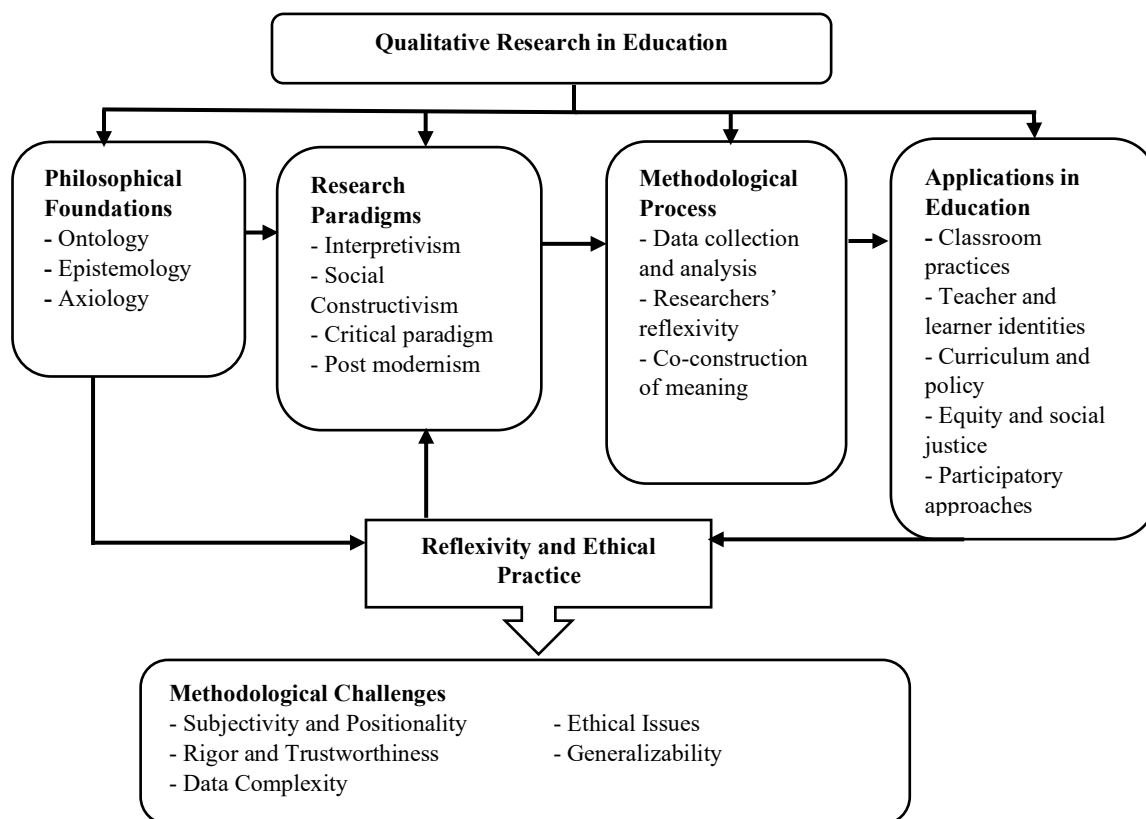


Figure 1: Conceptual Framework

Methodology

This study utilized a literature review as its research design. A literature review can be broadly defined as a systematic approach to collecting and synthesizing previous research (Baumeister & Leary, 1997; Tranfield et al., 2003). A well-conducted review serves as a strong foundation for advancing knowledge and facilitating theory development (Webster & Watson, 2002). The study adopts an interpretivist-constructivist epistemological stance, viewing knowledge as socially constructed, contextually situated, and shaped through interaction, rather than being objectively discovered (Guba & Lincoln, 1994). It also embraces a relativist ontology and a values-laden axiology (Denzin & Lincoln, 2018). Unlike systematic reviews, which require strict inclusion and exclusion criteria, predefined databases, and procedural protocols (Snyder, 2019), this study employed a flexible yet rigorous selection strategy. This approach allowed for engagement with influential, contextually meaningful, and theoretically rich scholarship. To conduct this study, I first developed specific criteria for selecting



the review materials. These criteria included purpose, recency of available literature, relevance, availability, and the presence of indexing and abstracting. The primary sources of information were peer-reviewed and indexed journal articles, seminal theoretical books, and foundational theoretical texts related to qualitative research. I selected these sources purposefully, guided by the objectives of the research. To gather the materials, I utilized databases such as Google Scholar, ResearchGate, Academia.edu, ProQuest, and Semantic Scholar. I searched using keywords such as “qualitative research in education,” “philosophical foundations of qualitative research,” “uses of qualitative research in education,” and “issues of qualitative education research.” I first reviewed the abstracts of the papers to assess relevance, then downloaded those that were open access and requested those that were unavailable from the authors through their ResearchGate profiles. After selecting the texts, I read them recursively, highlighting key ideas and noting them in a review matrix that I developed. I then coded the information gathered from the sources in this matrix. Based on these codes, I developed categories and eventually identified themes, which were presented as findings through critical interpretation, in alignment with the objectives of my research, using Braun and Clarke’s (2006) model of thematic analysis. Although this study does not involve empirical participants, issues of quality and rigor were addressed through theoretical credibility, analytical transparency, and internal coherence (Lincoln & Guba, 1985). Ethical considerations primarily involved scholarly integrity and the responsible representation of sources, ensuring that all theoretical contributions are acknowledged to avoid misinterpretation.

Results and Discussion

By extensively examining the existing literature from various researchers regarding qualitative research, including its underlying philosophy, methodology, challenges encountered, and practical applications, the subsequent results have been identified as findings of the study.

Philosophical Foundations of Qualitative Research

The philosophical foundations of qualitative educational research primarily reside within interpretivist and constructivist paradigms. These paradigms challenge the positivist assertion of a singular, objective reality waiting to be uncovered (Cohen et al., 2018). Instead, they argue that realities are multiple, socially constructed, and influenced by human interactions and interpretations (Schwandt, 2015). This ontological stance informs a corresponding epistemological view: knowledge is not merely transmitted but is co-constructed through the interplay between the researcher and the researched (Lincoln et al, 2011). As Lincoln et al. (2018) emphasize, the knower and the known are inseparable, with understanding emerging from interpretive engagement with participants’ perspectives. This philosophical foundation is further enriched by critical theory, which broadens the interpretive focus to encompass analyses of power, hegemony, and social justice (Freire, 1970). From this critical standpoint, qualitative research serves as a means to expose and challenge inequitable structures within educational systems, aiming not only to understand the world but to transform it (Kincheloe & McLaren, 2011). Likewise, postmodern and poststructuralist influences underscore the instability of meaning, the significance of discourse, and the deconstruction of grand narratives in education, prompting qualitative inquiry to consistently interrogate its own assumptions and authority (St. Pierre, 2014). The philosophical underpinnings of qualitative research are presented, discussing its ontology, epistemology, axiology, and methodology.

Ontology

Ontology refers to the nature of reality (Lincoln et al, 2011). According to Crotty (1998), ontology deals with the nature of existence, while Bryman (2012) emphasizes that it focuses on social entities. Hamersley (1992) also links ontology to the nature of reality. In research, ontology involves defining truth and reality, as noted by Antwi and Hamza (2015). Ontology answers fundamental questions about social reality, such as whether it is objective and independent of human perception or socially constructed through interaction and experience. Qualitative research typically operates from a relativist or constructivist ontology, which posits that reality is multiple, fluid, and socially constructed rather than singular and fixed (Guba & Lincoln, 1994). From this viewpoint, social phenomena—such





as identity, language practices, or classroom interactions—are not seen as objective entities; instead, they are understood as meanings constructed by individuals within specific sociocultural contexts. Therefore, qualitative researchers aim to comprehend how participants interpret their lived experiences rather than seeking a universal truth (Denzin & Lincoln, 2018). This ontological perspective is particularly relevant in educational and social research, where realities are shaped by context, power dynamics, culture, and history.

Epistemology

Epistemology is the study of how individuals acquire knowledge. It focuses on the nature of knowledge and the relationship between the knower (the researcher) and what can be known (Crotty, 1998). In qualitative research, epistemology is primarily interpretivist or constructivist, emphasizing that knowledge is co-constructed through interaction between the researcher and participants (Merriam & Tisdell, 2016). In the field of education, epistemology examines how teaching, learning, pedagogy, and educational policies are developed and implemented. Unlike positivist epistemologies, which prioritize objectivity and detachment (Rauteda, 2025a), interpretivist epistemology acknowledges that researchers cannot be completely detached from the research process (Cohen et al., 2018). Understanding, therefore, emerges through dialogue, reflexivity, and interpretation (Lincoln et al., 2018). Meaning is context-dependent and shaped by the social, cultural, and linguistic backgrounds of participants (Creswell & Poth, 2018). This epistemological stance legitimizes subjective experiences, narratives, and voices as valuable forms of knowledge, particularly in studies that aim to highlight marginalized or underrepresented perspectives.

Axiology

Axiology is a branch of philosophy that examines values, particularly ethical and aesthetic ones. It highlights the significance of values, ethics, and a researcher's positionality in the research process (Lincoln et al., 2018). Qualitative research acknowledges that inquiry is inherently influenced by values, and that researchers' beliefs, experiences, and moral commitments play a crucial role in shaping research design, data interpretation, and representation (Pretorius, 2024). Instead of trying to eliminate values from the research process, qualitative researchers engage in reflexivity, which involves critically reflecting on how their positionality affects their work (Creswell & Poth, 2018). Ethical considerations—such as respecting participants' voices, promoting social justice, and fostering empowerment—are fundamental to qualitative inquiry. In critical and participatory approaches, axiology goes beyond ethics to encompass a commitment to transformation, equity, and advocacy (Kemmis et al., 2014). Therefore, values are not seen as biases to be eliminated; rather, they are essential for creating meaningful and responsible knowledge.

Methodology

Methodology refers to the overall strategy and rationale that guide the selection of research methods, linking philosophical assumptions to practical procedures (Creswell & Poth, 2018). Qualitative research methodology focuses on exploring, understanding, and interpreting human experiences in depth and within their natural contexts (Cohen et al., 2018). It prioritizes rich and detailed descriptions, flexibility, and inductive analysis, allowing theories or insights to emerge from the data rather than being imposed beforehand (Merriam & Tisdell, 2016). The primary goal of qualitative research is to build theory rather than test existing hypotheses. It seeks to interpret people's experiences and create meaning from them. Qualitative research employs a variety of methodologies, including case studies, ethnography, phenomenology, narrative inquiry, action research, Participatory Action Research (PAR), and grounded theory (Creswell & Poth, 2018; Denzin & Lincoln, 2018). Researchers in this field utilize various data collection methods such as interviews, focus group discussions (FGD), observations, reflective journals, and document analysis (Cohen et al., 2018). For data analysis, qualitative research primarily uses thematic analysis, which involves coding, categorization, and thematization (Braun & Clarke, 2006). In qualitative research, trustworthiness is achieved through strategies like triangulation, member checking, reflexive journaling, and prolonged engagement, rather than relying on statistical validity and reliability (Lincoln & Guba, 1985). Thus, qualitative research methods are flexible, democratic, and reveal human experiences. In education, these methodologies are





particularly useful for addressing complex phenomena that are challenging to quantify using statistical methods.

Paradigms of Qualitative Research

A research paradigm refers to a perspective or belief system that influences researchers' assumptions regarding ontology, epistemology, and methodology (Guba & Lincoln, 1994). It is described as "a collection of beliefs concerning how specific problems exist and a consensus on how such issues can be explored" (Fraser & Robinson, 2004, p. 59). In other words, it is a "framework for viewing the world that shapes a research topic" (Hughes, 2010, p. 35). Furthermore, Cohen et al. (2018) noted that paradigms extend beyond mere methodologies; they represent different perspectives on the nature of the world and what it means to understand or know it. Additionally, a paradigm articulates what the researcher perceives reality to be, how they believe knowledge can be comprehended, and what they prioritize in research (Pretorius, 2024). In qualitative research, paradigms hold particular importance as they influence research questions, the researcher's role, and the interpretation of meanings. In the realm of research, various paradigms exist, including positivism, post-positivism, interpretivism, pragmatism, social constructivism, critical realism, and social constructionism (Karupiah, 2022; Park et al., 2020). However, qualitative research primarily adopts interpretivism, critical realism, social constructivism, and postmodernism as its core philosophical foundations (Cohen et al., 2018). The common paradigms that the qualitative researchers fundamentally use are discussed below;

Interpretivism

The interpretivist paradigm represents a significant foundation of qualitative research. It arose in response to the positivist belief that social reality can be examined using objective, value-free methods akin to those utilized in the natural sciences (Muijs, 2004). In contrast, interpretivism contends that reality is constructed socially, is bound by context, and is diverse, asserting that comprehending human experiences necessitates a focus on the process of meaning-making (Cohen et al., 2018; Schwandt, 2015; Lincoln et al., 2018). This paradigm is rooted in a relativist ontology that posits reality is neither singular nor immutable but is shaped through collective understandings and shared meanings (Cohen et al., 2018). In this respect, Guba and Lincoln (1994) state that realities are varied and formed by individuals as they interact with their environment. Consequently, qualitative research within this paradigm aims to reveal multiple realities rather than validate a universal truth. Furthermore, the interpretivist paradigm is based on a subjectivist epistemological viewpoint, asserting that research is inherently influenced by values (Creswell & Poth, 2018; Pretorius, 2024). Regarding interpretivists, Pretorius (2024) notes that they hold the belief that reality is subjective and that it can only be partially comprehended since it is formulated in the minds of individuals. According to this approach, researchers aim to decode how participants understand their surroundings, while the researcher takes on the role of an active interpreter.

Social Constructivism

Closely associated with interpretivism is the constructivist paradigm, which underscores the collaborative nature of knowledge creation between researchers and participants. Constructivists assert that meanings are developed through interaction and dialogue, rather than being revealed as objective truths (Crotty, 1998). This paradigm places a strong focus on context, culture, and language as fundamental components of meaning-making. Rather than emphasizing generalizability, constructivist research values trustworthiness, credibility, and authenticity (Lincoln & Guba, 1985). Constructivism is frequently applied in fields such as educational research, applied linguistics, and sociocultural studies. Instead of seeking universally applicable laws, social constructivist educational research aims for a nuanced understanding that is contextually grounded and theoretically transferable (Lincoln & Guba, 1985). Within this paradigm, the role of educational researchers is not that of a neutral observer but rather that of an active participant in the construction of meaning.

Critical Paradigm

The foundations of the critical paradigm can be traced back to the Frankfurt School and the contributions of Max Horkheimer, who defined critical theory as a means to confront domination and





promote liberation. The educational aspect of criticalism was significantly influenced by Paulo Freire, whose 'Pedagogy of the Oppressed' (1970) redefined education as a dialogical and liberating process, rather than a mere 'banking model' of knowledge delivery. The critical paradigm pushes qualitative inquiry beyond mere interpretation to include critique and transformation. Anchored in critical theory, this paradigm perceives social reality as influenced by historical, political, and ideological dynamics, with a specific focus on power relationships and structural inequalities (Kincheloe & McLaren, 2011). The methods aligned with the critical paradigm aim not just to interpret social phenomena but also to contest unjust structures and collaboratively foster change. For example, Participatory Action Research engages participants as co-researchers who work together to identify issues and create solutions (Kemmis et al., 2014). Additionally, criticalism argues that knowledge is inherently political and that research is explicitly value-driven. The main objective of critical qualitative research is not only to comprehend social phenomena but also to confront oppression and advance social justice. Methodologies such as critical discourse analysis, feminist research, and Participatory Action Research (PAR) are frequently linked to this paradigm.

Post-modern Paradigm

The postmodern paradigm represents a significant orientation that contests universal truths, fixed meanings, and overarching narratives (Jameson, 1991). Jameson (1991) identifies several key characteristics of postmodernism, including the absence of grand narratives, the celebration of discontinuity, difference, diversity, and individuality; an emphasis on the local context; a tendency to neglect historical continuity; the self-referential nature of the present; the significance of temporality and context; a focus on relativism over absolutism; the potential for emancipation; and the recognition that researchers are part of the world they study. In postmodern qualitative research, representation is problematized, researcher authority is questioned, and the fragmented and fluid qualities of identity and knowledge are emphasized (Lyotard, 1984). From this viewpoint, research texts are seen as partial and situated, rather than objective depictions of reality. Innovative methodologies such as autoethnography, narrative experimentation, and performative inquiry are commonly utilized.

Uses of Qualitative Research in Education

Qualitative research is essential in educational inquiry as it explores the complex and context-dependent aspects of teaching and learning. Unlike quantitative methods that focus on measurement and generalization, qualitative inquiry seeks to understand how educational realities are socially constructed within specific contexts. As Creswell and Poth (2018) note, it is ideal for examining processes, experiences, and interpretations instead of testing hypotheses. In educational settings where interaction, identity, power, and culture matter, qualitative methods provide valuable insights that enhance both theory and practice (Denzin & Lincoln, 2018). The application of qualitative education research can be organized around various themes:

Understanding Classroom Processes and Pedagogical Practices

Qualitative research plays a crucial role in understanding classroom processes and pedagogical practices. It allows researchers to explore teaching and learning as socially situated, interactive, and meaning-making activities. Classrooms are complex social spaces where pedagogical decisions, learner responses, language use, and power relations intersect in dynamic ways (Creswell, 2014; Hammersley, 2012). Quantitative approaches often fail to capture this complexity (Rauteda, 2025a), while qualitative inquiry provides tools to examine how pedagogical practices are enacted, interpreted, and negotiated in real classroom contexts (Denzin & Lincoln, 2018). According to Guba and Lincoln (2005), qualitative research is valuable for uncovering the hidden experiences of both teachers and students regarding curricula, instructional practices, and classroom culture. Through prolonged engagement and rich descriptions, qualitative researchers document the subtle dynamics of participation, authority, collaboration, and resistance that shape learning environments (Cohen et al., 2018). Research methods such as ethnography, case studies, and narrative inquiry explore the experiences, behaviors, and stories of teachers and students in natural settings (Creswell, 2014). These methods help to understand classroom dynamics, participants' emotions, and amplify their voices (Guba & Lincoln, 1994). In this sense, qualitative research serves as the voice for the unvoiced. Furthermore, Lincoln and Guba (1985)





emphasize that naturalistic inquiry is particularly well-suited for educational settings, as it preserves contextual integrity and acknowledges multiple realities. By conceptualizing classrooms as lived spaces rather than controlled environments, qualitative research captures the complexity of real-world teaching and learning.

Investigating Teacher and Learner Identity, Experience, and Professional Practice

Qualitative research plays a crucial role in exploring the interconnected processes of teacher identity formation, professional practice, and student experiences within educational settings. It is particularly valuable for understanding how teachers and learners perceive their lived realities, navigate institutional structures, and construct their identities over time. Research on teacher identity and professional development shows that teaching is not merely a technical activity; it is a deeply emotional, moral, and relational practice shaped by personal histories and sociocultural conditions (Beauchamp & Thomas, 2009; Vähäsantanen & Eteläpelto, 2015). Through methods such as narrative inquiry, phenomenology, and interviews, researchers can investigate how teachers interpret their experiences, respond to institutional expectations, and continuously reshape their professional identities (Clandinin & Connelly, 2000; Yuan & Lee, 2016). This research highlights aspects of teaching that often remain unseen in standardized or outcome-driven studies, particularly about teachers' emotions, values, and relationships (Schutz & Zembylas, 2009; Golzar, 2020).

Moreover, qualitative inquiry is essential for understanding student experiences and the formation of learner identities. Educational outcomes are influenced not only by cognitive processes but also by social interactions, cultural backgrounds, language practices, and power relations inherent in schools (Fairclough, 1989; Juvonen et al., 2019). Methods such as in-depth interviews, focus groups, and life-history research allow scholars to examine how students perceive success and failure, experience inclusion or marginalization, and navigate institutional norms (Denzin & Lincoln, 2018; Dörnyei, 2007). As Merriam and Tisdell (2016) contend, qualitative research effectively reveals how individuals interpret their educational journeys within broader sociocultural contexts, including how marginalized students develop a sense of belonging or resilience in the face of systemic challenges.

Overall, qualitative studies of teacher and learner identities emphasize voice and subjectivity, enabling participants to express their perspectives and, at times, challenge dominant professional and institutional narratives (Denzin & Lincoln, 2018). By shedding light on the interconnected experiences of teachers and students, qualitative research contributes to more reflective, responsive, and context-sensitive models of teacher education, inclusive pedagogy, and equitable educational policy (Castañeda-Londoño et al., 2024).

Examining Curriculum, Policy, and Institutional Change

Qualitative research plays a vital role in examining curriculum development and the implementation of educational policies. These policies do not operate uniformly across different contexts; instead, they are interpreted and executed in various ways depending on local conditions (Ball, 1994; Bowe et al., 2017). Through case studies and document analysis, qualitative researchers investigate how teachers and administrators understand reforms, navigate constraints, and adapt initiatives to fit their specific institutional realities (Dhungana & Gnawali, 2023). In these environments, involved parties often prioritize professional skill development and competency-based outcomes, even when their main motivation for engagement is career advancement rather than a purely pedagogical shift.

Rather than viewing policy as a fixed directive, qualitative inquiry conceptualizes it as a dynamic process influenced by human agency (Ball et al., 2012; Pont & Viennet, 2017). This perspective regards "policy enactment" as an ongoing form of policymaking, where what occurs in the classroom is just as important as what legislators decide in their chambers (Ball et al., 2012). Recent studies underscore that for reforms to succeed, they must be inclusive, sensitive to context, and take into account the social and professional support necessary to alleviate teacher stress during implementation. This approach highlights significant gaps between policy intentions and classroom realities, providing detailed evidence that can guide the development of more effective and context-responsive reform strategies (Creswell & Poth, 2018).





Addressing Multilingualism, Equity, and Social Justice

In multicultural and multilingual educational settings, qualitative methods are especially valuable. These methods focus on discourse, interaction, and lived experiences, allowing researchers to examine how language practices, cultural identities, and power relations intersect in classrooms (Norton & De Costa, 2018). Such studies reveal how marginalized learners navigate issues of belonging, participation, and recognition within dominant educational structures (Lave & Wenger, 1991). This approach aligns with interpretive and critical qualitative traditions that emphasize ethical responsibility, representation, and social justice (Denzin & Lincoln, 2018). In linguistically and culturally diverse contexts, qualitative inquiry supports culturally responsive pedagogy and socially just educational practices (Ladson-Billings, 1995; Weidl & Erling, 2025).

Participatory and Action-Oriented Applications

Participatory and action-based qualitative methods further enhance the application of qualitative research within the field of education. For instance, action research entails educators systematically examining their own practices to enhance teaching and learning (Rauteda, 2025a; 2025b; 2025c, 2026). Kemmis et al. (2014) characterize action research as a collaborative and reflective process that merges inquiry with transformation. By viewing teachers as co-researchers, qualitative methods facilitate the democratization of knowledge creation, foster professional empowerment (Kemmis et al. 2014), and contribute to the enhancement of schools and community-oriented educational projects.

Theory Building, Reflexivity, and Research Rigor

Qualitative research plays a significant role in fostering educational innovation by creating theories based on practical experiences. Techniques such as grounded theory allow researchers to develop conceptual frameworks that are derived inductively from the experiences of participants, rather than imposing predetermined ideas (Glaser & Strauss, 1967). This approach to theory-building is especially valuable in situations where existing models fail to adequately represent local realities (Merriam & Tisdell, 2016). Additionally, qualitative inquiry emphasizes rigor through criteria such as credibility, transferability, dependability, and confirmability (Lincoln & Guba, 1985). These criteria are supported by strategies like triangulation, member checking, and reflexive analysis.

Methodological Challenges of Qualitative Research in Education

Qualitative research has become a well-established and respected method in the fields of education, social sciences, and applied disciplines. Focusing on context, meaning-making, and the perspectives of participants, it allows for rich and nuanced understandings of complex phenomena. However, despite its strengths, qualitative research also poses significant methodological challenges that require careful consideration of philosophical, ethical, and procedural aspects. These challenges include issues of rigor, researcher positionality, data complexity, generalizability, and ethical responsibility.

Subjectivity and Researcher Positionality

One of the main challenges in research methodology involves subjectivity and the positionality of the researcher. In qualitative research, the researcher acts as the primary instrument for collecting and interpreting data. As noted by Lincoln and Guba (1985), the findings are shaped through the interaction between the researcher and the participants. While this co-construction of meaning aligns with interpretive paradigms, it raises concerns about bias and influence. The researcher's theoretical perspectives, cultural background, and personal experiences inevitably affect how research questions are framed, how data is interpreted, and how participants' voices are represented. Therefore, reflexivity is crucial. However, maintaining a critical self-awareness throughout the research process can be methodologically challenging (Creswell & Poth, 2018).

Rigor and Trustworthiness

One significant challenge in qualitative research is establishing rigor and trustworthiness. Unlike quantitative research, which relies on statistical reliability and validity, qualitative research must demonstrate key qualities such as credibility, transferability, dependability, and confirmability (Lincoln & Guba, 1985). To ensure credibility, researchers may need to engage with participants for an extended period, utilize triangulation, and conduct member checking. These processes require considerable time





and investment in building relationships. Transferability presents its own limitations, as qualitative findings are often context-specific and cannot be generalized statistically. Therefore, researchers must provide detailed "thick descriptions" to help readers assess how findings might apply to different contexts. Additionally, maintaining methodological transparency and creating audit trails adds further complexity to the design of qualitative studies.

Data Volume and Analytical Complexity

Qualitative research faces key methodological challenges, particularly regarding data volume and analytical complexity. It often generates extensive textual or audiovisual data from interviews and observations, requiring systematic procedures and theoretical awareness for effective management (Creswell, 2014; Corbin & Strauss, 2015). The interpretive nature of thematic analysis allows for multiple interpretations, making it demanding to maintain coherence while honoring participants' meanings (Braun & Clarke, 2006; Denzin & Lincoln, 2018). A critical issue in data analysis is how to represent participants' voices. Qualitative inquiry is interpretive; researchers actively construct narratives through their choices rather than merely reporting accounts. This shaping process influences how participants are perceived (Denzin & Lincoln, 2018; Richardson, 1997). Risks of misrepresentation are significant, as illustrated by Geertz's (1973) "thick description," which emphasizes the need for contextual grounding to avoid distorting lived experiences. Hammersley and Atkinson (2007) advise maintaining reflexivity about how theoretical lenses affect representation. Reflexivity is crucial for ethical representation, requiring researchers to examine their positionality and biases (Charmaz, 2014; Finlay, 2002). Employing reflexive journaling, member checking, and dialogic engagement can enhance the credibility of research. Balancing analytic insight with fidelity to participants' perspectives is essential, especially with marginalized groups (Merriam & Tisdell, 2016). Critical scholars emphasize that voice is co-constructed within relational contexts, advocating for dialogic representation over hierarchical narratives (Lather, 1991).

Ethical Complexity

Ethics in research refers to a code of conduct that addresses what is considered good or bad, right or wrong (Cohen et al., 2018). A researcher must prioritize ethical considerations from the beginning to the end of the study. Sikes (2006) highlights that ethics influence researchers' choices, the selection of research topics, methodologies, methods, and writing styles (p. 106). Qualitative research is known for its emphasis on thick description, subjectivity, in-depth information, insider perspectives, and the stories of participants. Consequently, it can be challenging to balance objective interpretation while maintaining privacy and confidentiality (Cohen et al., 2018). Additionally, qualitative researchers often occupy an insider position, which requires them to engage with the socio-cultural aspects of their participants. Cultural differences can complicate these ethical engagements. Cohen et al. (2018) argue that ethical decisions are contextually situated—affected by social, political, institutional, cultural, and personal factors, meaning that ethical norms can vary significantly across different regions of the world. Therefore, upholding ethics in research involves navigating a range of issues and dilemmas. Ethical complexity itself poses a significant methodological challenge. Because qualitative research typically entails in-depth interaction with participants, issues related to confidentiality, power dynamics, and emotional risk become more pronounced. For instance, researching teachers or students within educational settings may introduce tensions concerning authority, evaluation, or institutional politics. Achieving genuine informed consent and maintaining trust throughout prolonged engagement necessitates careful ethical judgment that goes beyond mere procedural compliance (Creswell & Poth, 2018).

Generalizability and Validity

Validity in research refers to the extent to which data interpretations are supported by the relevant theories and evidence (Ary et al., 2002). In simpler terms, validity is the process of measuring what one intends to measure (Muijs, 2004). Maintaining validity in qualitative research can be challenging, as the phenomena studied in education are often complex and abstract. Muijs (2004) points out that many concepts we aim to measure—such as self-esteem, motivation, attitudes, self-concept, and feelings or experiences—are difficult to assess validly. Consequently, educational phenomena are





not concrete; instead, they are abstract, making it harder to maintain validity. Conversely, generalizability (often referred to as external validity in qualitative research) involves applying the findings of a study to similar contexts or populations. Since qualitative research typically focuses on specific contexts, and because the data is often analyzed with the researcher's personal engagement, generalizing findings across multiple contexts can be challenging. Critics frequently claim that qualitative research lacks generalizability due to small sample sizes and contextual specificity (Creswell & Poth, 2018). While qualitative scholars address this concern by framing it in terms of transferability rather than statistical inference (Lincoln & Guba, 1985), the perception of limited generalizability can hinder acceptance in policy-driven or evidence-based environments. Researchers must, therefore, clearly articulate the theoretical or analytical contributions of their findings beyond the immediate setting. Moreover, qualitative research designs are often emergent and flexible (Denzin & Lincoln, 2018). While this flexibility is a strength, it can lead to methodological uncertainty. Research questions, sampling strategies, and analytical frameworks may evolve as data collection progresses. Although this adaptability allows for responsiveness to the specific context, it can complicate research planning, funding proposals, and institutional review processes that typically expect fixed designs (Denzin & Lincoln, 2018). Thus, while qualitative research provides valuable insights into human experiences and social processes, it also presents significant methodological challenges. Issues such as subjectivity, rigor, representation, ethical complexity, limited generalizability, emergent design, and analytic workload must be systematically addressed.

Conclusion

This study explores the philosophical foundations, guiding paradigms, applications, and methodological challenges of qualitative research in education through a critical synthesis of existing literature. The review demonstrates that qualitative inquiry is deeply rooted in interpretivist, constructivist, critical, and postmodern traditions, which challenge positivist assumptions of objectivity, neutrality, and singular truth. By embracing multiple realities, co-constructed knowledge, and value-laden inquiry, qualitative research provides a powerful framework for understanding educational phenomena as socially, culturally, and historically situated.

The analysis further highlights the broad applications of qualitative research across various educational domains, including classroom interactions, pedagogical practices, teacher and learner identities, curriculum enactment, policy interpretation, multilingualism, equity, and participatory transformation. These applications emphasize the strength of qualitative inquiry in capturing processes, meanings, emotions, and power relations that often remain inaccessible through quantitative approaches. In this regard, qualitative research not only complements other methodologies but also addresses critical epistemic gaps by foregrounding voice, context, and lived experience.

At the same time, the study acknowledges the ongoing methodological challenges associated with qualitative research. Issues relating to researcher positionality, rigor and trustworthiness, ethical complexities, representational responsibility, data intensity, and limited generalizability necessitate sustained reflexivity and methodological transparency. Importantly, this paper argues that these challenges are not deficiencies to be corrected by positivist criteria; rather, they are intrinsic to the epistemological commitments of qualitative inquiry itself. When addressed through reflexive practice, theoretical coherence, and ethical accountability, these challenges can strengthen qualitative research rather than weaken it.

Consequently, this study reaffirms qualitative research as a principled, rigorous, and indispensable approach in education. By systematically articulating its philosophical grounding, methodological practices, and applied value, the paper contributes to ongoing scholarly debates and supports the legitimacy of qualitative inquiry in theory building, policy interpretation, and socially responsive educational practice. Future research may expand this work by empirically examining how qualitative methodologies are enacted in diverse educational contexts and by exploring innovative qualitative designs that further enhance rigor, inclusivity, and transformative potential.





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