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Grounded Theory as a Qualitative Research Method: From Glaser and Strauss to Constructivist and Situational Extensions

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Abstract

Grounded theory (GT) is one of the most influential and widely applied qualitative research methodologies in the social, health, educational, and management sciences, offering researchers a systematic, iterative framework for generating theory that is rigorously grounded in empirical data rather than derived deductively from prior theoretical commitments. This paper provides a comprehensive, critically informed, and practically oriented methodological review of grounded theory, tracing its intellectual development from Glaser and Strauss's foundational Discovery of Grounded Theory (1967) through the Strauss and Corbin reformulations of 1990 and 1998, the productive split between Glaserian and Straussian schools in 1992, and the transformative contributions of Kathy Charmaz's constructivist grounded theory (2006, 2014) and Adele Clarke's situational analysis (2005, 2018). The paper systematically addresses the philosophical and epistemological foundations of GT across objectivist, post-positivist, constructionist, and post-modern positions; a typology of six GT variants including classic Glaserian GT, Straussian GT, constructivist GT, situational analysis, dimensional analysis, and feminist GT; the twelve core procedures of GT research initial sampling, open coding, constant comparison, memo-writing, focused and axial coding, theoretical sampling, theoretical saturation, selective coding, core category identification, and theory construction; a detailed comparison of the three major schools on nine methodological dimensions; quality and rigour criteria appropriate to each school; ethical considerations specific to GT's iterative, emergent design; disciplinary applications across health, education, management, and digital governance; and a systematic comparison with thematic analysis, narrative inquiry, ethnography, and interpretive phenomenological analysis. Six structured tables consolidate historical, typological, procedural, comparative, and quality information. Recent developments including the abductive reasoning turn in GT, the use of AI-assisted coding tools in ATLAS.ti and NVivo, and the application of situational analysis to digital policy and AI governance research are critically assessed. The paper argues that GT remains methodologically indispensable wherever the research question concerns an under-theorised social process, and that its greatest contribution the insistence that rigorous theory can and should be built from systematic engagement with empirical data rather than imposed upon it remains as significant today as it was in 1967.

Keywords: grounded theory, qualitative research, constant comparison, theoretical sampling, Charmaz, constructivist grounded theory, situational analysis, theoretical saturation, memo-writing, open coding

INTRODUCTION

Among the qualitative research methodologies available to social scientists, grounded theory occupies a uniquely ambitious position: it is the only qualitative method that takes as its explicit goal the generation of theory. Where thematic analysis seeks patterns of meaning, narrative inquiry illuminates biographical experience, and ethnography produces thick accounts of cultural practice, grounded theory pursues something more formally theoretical a systematic, conceptually dense, empirically grounded account of a social process that explains how and why phenomena occur in the way they do. This theoretical ambition, combined with a rigorous set of iterative procedures for moving from data to theory through systematic analysis, constant comparison, and theoretically driven sampling, gives grounded theory its distinctive methodological identity and its enduring relevance across disciplines. Grounded theory was introduced by sociologists Barney Glaser and Anselm Strauss in their 1967 monograph The Discovery of Grounded Theory: Strategies for Qualitative Research a work that was simultaneously a methodological manifesto and a challenge to the dominant logic of social science inquiry. At a moment when sociology was dominated by grand deductive theorising in the tradition of Talcott Parsons and by large-scale quantitative survey research, Glaser and Strauss argued that rigorous, systematic theory could be generated inductively from qualitative data through a set of specific analytic procedures. Their argument was not merely methodological but epistemological: theory discovered in data was, they insisted, more faithful to social reality, more practically relevant, and more capable of modification in light of new evidence than theory derived from armchair speculation or imported from adjacent disciplines without empirical grounding. The fifty-seven years since the Discovery have been productive and contentious in equal measure. Glaser and Strauss diverged dramatically in the late 1980s over the proper interpretation of their own method, producing two distinct schools whose procedural differences remain irreconcilable. Charmaz's constructivist grounded theory, developed from the 1990s onward, challenged the objectivist epistemological assumptions shared by both Glaserian and Straussian schools and produced a reformulation of the method that is now arguably more widely cited than either original tradition. Clarke's situational analysis extended the method into post-modern terrain, incorporating Foucauldian discourse analysis and the sociology of scientific knowledge into a GT framework capable of addressing not merely individual social processes but the broader situational and discursive conditions within which those processes are embedded. This paper reviews the full scope of this development and provides the comprehensive methodological guidance necessary for researchers selecting, designing, and implementing a grounded theory study.

Historical Background and Intellectual Development

Origins: Glaser, Strauss, and the Discovery

The intellectual context of grounded theory's emergence in 1967 is essential for understanding both its founding logic and the subsequent debates about its proper interpretation. Barney Glaser had been trained in quantitative methodology and philosophy of science at Columbia University under Paul Lazarsfeld and Robert Merton two of the most rigorous methodologists of the mid-twentieth century. Anselm Strauss had been trained in symbolic interactionism at the University of Chicago under Herbert Blumer, the inheritor of George Herbert Mead's pragmatist social psychology. Their collaboration at the University of California San Francisco, studying the social organisation of dying in American hospitals, produced not only the substantive findings

published in Awareness of Dying (1965) but the methodological framework published in The Discovery of Grounded Theory (1967). The Discovery made several foundational claims that were, at the time, genuinely radical. First, that qualitative research could and should generate theory, not merely describe social worlds or provide data for theorists to interpret. Second, that this theory-generation required specific analytic procedures most importantly, constant comparison (systematically comparing each new piece of data with all previous data and codes), theoretical sampling (directing further data collection on the basis of emerging analysis), and theoretical saturation (continuing data collection until no new theoretical insights emerge) rather than the informal analytic practices that characterised most qualitative work of the period. Third, that the resulting theory should be judged not by the criteria of quantitative verification but by the GT-specific criteria of fit (does the theory fit the data from which it was generated?), work (does the theory explain and predict what happens in the domain it addresses?), relevance (does the theory address a core concern of the people studied?), and modifiability (can the theory be revised when new data require it?) (Glaser, 1978).

The Strauss and Corbin Reformulation

Anselm Strauss's collaboration with Juliet Corbin, published as Basics of Qualitative Research in 1990, represented a substantial reformulation of the GT procedures introduced in the Discovery. Strauss and Corbin introduced a more structured and systematic coding procedure distinguishing open coding (initial, data-close categorisation), axial coding (identifying the relationships between categories through a specific analytical framework called the paradigm model or coding paradigm), and selective coding (integrating all categories around a central core category) as well as the conditional matrix, a diagram representing the multiple contextual levels within which social processes are embedded. The paradigm model, in particular, specified that analysts should identify for each category the causal conditions that give rise to it, the context in which it occurs, the intervening conditions that modify it, the actions and interactions through which it is managed, and the consequences that follow from those actions producing an analytical framework of considerable procedural specificity. The Strauss and Corbin reformulation was widely adopted, particularly in nursing and health research, where its procedural clarity made GT accessible to researchers without sociological training. It was also vigorously contested most notably by Glaser himself, whose 1992 monograph Emergence vs. Forcing: Basics of Grounded Theory Analysis argued that Strauss and Corbin had fundamentally misrepresented the method by replacing the inductive logic of theoretical emergence with a deductive framework that forced data into predetermined analytical categories. The Glaser-Strauss split produced two methodologically distinct GT traditions that have evolved in parallel ever since, and researchers selecting grounded theory must specify which tradition they are following and why.

Charmaz and the Constructivist Turn

Kathy Charmaz's constructivist grounded theory, developed through a series of influential papers from the 1990s onward and consolidated in Constructing Grounded Theory (2006, 2014), represented a more fundamental philosophical challenge to both Glaserian and Straussian schools than the procedural debates between them. Both Glaser and Strauss, Charmaz argued, shared an objectivist epistemological assumption: that there is a single social reality 'out there' that the researcher's analytic procedures can discover and represent in theoretical form, independent of the researcher's own perspective and theoretical commitments. This assumption, she argued, was philosophically untenable both the data collected in GT research and the theory

generated from that data are co-constructions of the researcher and the participants, shaped by the specific relational context of the research encounter, the theoretical assumptions and personal biography of the researcher, and the social and historical conditions within which the research is conducted. Charmaz's constructivist reformulation retained the core GT procedures theoretical sampling, constant comparison, memo-writing, saturation while transforming their epistemological interpretation. Coding in constructivist GT uses action-focused gerund codes (e.g., 'managing uncertainty' rather than 'uncertainty management') to preserve the dynamic, processual character of social life and to resist the reification of social phenomena into static categories. Memo-writing is elevated from an analytic tool to the primary vehicle through which the researcher's interpretive reasoning is made visible and reflexively examined. Sensitising concepts borrowed from Herbert Blumer (1969) replace the strict taboo on prior theoretical knowledge in Glaserian GT, allowing the researcher to use existing theory as an analytic lens while remaining alert to data that challenges or complicates it. The resulting theory is explicitly positioned as the researcher's theoretical interpretation of what the data reveal about a social process rather than a discovered representation of an objective social reality.

Clarke's Situational Analysis

Adele Clarke's situational analysis (2005, 2018), developed at the University of California San Francisco in the tradition of Strauss's symbolic interactionist sociology, extended GT into post-modern territory by incorporating Foucauldian discourse analysis, feminist theory, and the sociology of scientific knowledge into a GT framework. Clarke argued that Straussian GT, despite its sophistication, remained focused on human actors and their actions while neglecting the non-human elements, discursive formations, and structural conditions that constitute the situations within which action occurs. Her situational maps visual tools that chart all significant human and non-human elements of a research situation without imposing a prior hierarchical order address this limitation by requiring researchers to map the full complexity of the situation before organising it analytically. Social worlds and arenas maps identify the collective actors whose perspectives and discourses constitute the social world of the phenomenon, while positional maps chart the range of positions taken on contested issues in the discursive field under study without necessarily attributing those positions to specific actors. Table 1 summarises the full historical development.

Table 1 *Historical Development of Grounded Theory Methodology*

Note. Compiled from Glaser and Strauss (1967), Strauss and Corbin (1990), Charmaz (2014), and Clarke et al. (2018)

Era	Key Development	Significance	Key Scholars
1967	The Discovery of Grounded Theory	Founding text; inductive theory generation from data; constant comparison; theoretical sampling; saturation introduced	Glaser & Strauss (1967)
1978	Theoretical Sensitivity	Glaser elaborates coding families; theoretical codes; emphasises emergence over forcing	Glaser (1978)
1987–1990	Strauss's reformulation	Conditional matrix; paradigm model introduced; analysis becomes more	Strauss (1987)

		structured and procedural	
1990	Basics of Qualitative Research (1st ed.)	Open, axial, selective coding formalised; coding paradigm (conditions, actions, consequences) systematised	Strauss & Corbin (1990)
1992	Glaser–Strauss split	Glaser critiques Strauss & Corbin for 'forcing' data; two distinct GT schools diverge	Glaser (1992)
1994–2000	Feminist and constructivist critiques	Objectivist assumptions challenged; researcher positionality and co-construction of theory foregrounded	Charmaz (1994, 2000); Clarke (2003)
2006	Constructing Grounded Theory (1st ed.)	Constructivist GT formalised; sensitising concepts; gerund coding; reflexivity; revised saturation logic	Charmaz (2006)
2005	Situational Analysis	Post-modern extension; situational maps; social worlds/arenas; positional maps; discourse analysis integrated	Clarke (2005)
2014	Constructing Grounded Theory (2nd ed.)	Focused and theoretical coding refined; memo-writing elevated; abductive reasoning integrated	Charmaz (2014)
2018	Situational Analysis in Practice	Worked examples across disciplines; visual mapping tools; digital and policy applications	Clarke, Friese & Washburn (2018)
2020–2026	AI-assisted GT and adaptive designs	NVivo, ATLAS.ti AI modules applied to GT coding; LLMs for memo generation; ethical debates emerging	Thornberg & Charmaz (2014); Barrera et al. (2025)

Philosophical and Epistemological Foundations

The philosophical foundations of grounded theory are more heterogeneous than those of most qualitative methods, because the three major schools rest on distinct and in some respects incompatible ontological and epistemological commitments. Understanding these differences is not merely of academic interest: they have direct implications for methodological decisions about the role of prior theory, the character of coding procedures, the criteria for saturation, and the form and claims of the resulting theoretical output.

Pragmatism and Symbolic Interactionism

The philosophical roots of grounded theory lie in the American pragmatist tradition particularly the work of John Dewey, William James, and Charles Sanders Peirce and in the symbolic interactionist sociology associated with George Herbert Mead, Herbert Blumer, and the Chicago School. From pragmatism, GT inherits the commitment to evaluating knowledge claims by their practical consequences, the rejection of sharp dualisms between theory and practice or observer and observed, and the understanding of inquiry as an active, problem-oriented engagement with a world that is always already known through prior experience and theoretical commitments. From symbolic interactionism, GT inherits the focus on meaning how human beings attribute meaning to their actions and environments and on the processes through which shared meanings are constructed and negotiated in social interaction (Blumer, 1969; Mead, 1934).

These philosophical foundations are most explicit and most consistently honoured in Charmaz's constructivist GT, which builds directly on Blumer's methodological writings and on the pragmatist understanding of inquiry as inherently perspectival and positionally situated. They are less explicitly acknowledged in Glaserian GT, which draws more heavily on the positivist philosophy of science tradition associated with Glaser's Columbia training, and in Straussian GT, which occupies an ambiguous position between symbolic interactionist and post-positivist commitments.

Abductive Reasoning

A significant recent development in the philosophical framing of GT has been the recognition that the method's logic of inquiry is better described as abductive rather than inductive. Induction involves drawing general conclusions from specific observations; abduction involves inferring the most plausible explanation for a surprising or puzzling observation asking 'what theoretical account would make this observation expected and intelligible?' (Peirce, 1903/1931; Reichertz, 2010). Thornberg and Charmaz (2014) argue that GT analysis, when conducted rigorously, involves precisely this abductive logic: the researcher does not simply observe patterns in data and generalise from them (induction) but generates theoretical concepts that explain why the observed patterns take the form they do. This abductive reframing is important because it positions GT theory as genuinely explanatory not merely descriptive and because it aligns GT's analytic logic with the logic of scientific discovery in a philosophically defensible way that the original induction-based account did not adequately capture (Timmermans & Tavory, 2012).

Typology of Grounded Theory Variants

Contemporary grounded theory encompasses six methodologically distinct variants, each with its own philosophical commitments, procedural specifications, and quality criteria. Table 2 presents the full typology. Researchers must select their variant explicitly and justify their choice in relation to their research question, epistemological position, and disciplinary context. The most consequential choice is between the three major schools Glaserian, Straussian, and constructivist because their procedural differences are substantive enough that mixing procedures from different schools without theoretical justification produces methodologically incoherent studies. The most widely adopted variant in contemporary qualitative social science research is Charmaz's constructivist GT, which has largely displaced the Straussian school in social science and health research journals as the methodological reference of choice for GT studies. This displacement reflects not merely fashion but the genuine methodological advantages of the constructivist approach: its explicit epistemological positioning, its accommodation of researcher reflexivity, its flexible integration of prior theory as sensitising concepts, and its nuanced treatment of saturation as theoretical sufficiency rather than a mechanical absence of new codes all address the philosophical and practical limitations of the earlier schools in ways that resonate with the broader interpretive and constructionist turn in qualitative social science.

Table 2 Typology of Grounded Theory Variants

Note. Compiled from Glaser and Strauss (1967), Strauss and Corbin (1990), Charmaz (2014), and Clarke et al. (2018).

Variant	Originator(s)	Epistemological	Core Distinguishing	Best Application

		Stance	Features	
Classic / Glaserian GT	Glaser & Strauss (1967); Glaser (1978, 1992, 1998)	Objectivist / post-positivist; theory 'emerges' from data if researcher has no preconceptions	All Is Data; emergent fit; 18 coding families; theoretical codes; no literature review before data collection	Sociology, nursing, management; studies where theoretical emergence is paramount
Straussian GT	Strauss & Corbin (1990, 1998, 2015)	Post-positivist; structured, systematic verification-oriented	Conditional matrix; open–axial–selective coding; paradigm model (causal conditions, context, actions, consequences)	Applied health and social science; multi-site studies requiring systematic comparability
Constructivist GT	Charmaz (2006, 2014)	Constructionist / interpretivist; theory co-constructed by researcher and participant	Gerund coding; sensitising concepts; reflexivity memos; flexible saturation; literature integrated iteratively	Social science, health, education; sensitive topics; research foregrounding participant meaning-making
Situational Analysis	Clarke (2005); Clarke, Friese & Washburn (2018)	Post-modern / post-structural; discourse, power, and non-human actants included	Three map types: situational, social worlds/arenas, positional; discourse and visual data integrated	Policy analysis, science & technology studies, gender, digital governance, AI ethics
Dimensional Analysis	Schatzman (1991); Kools et al. (1996)	Pragmatist / symbolic interactionist	Dimensional matrix replaces Straussian paradigm; more flexible sequencing; less prescriptive	Nursing and health research; studies resisting Strauss & Corbin's rigid structure
Feminist GT	Wuest (1995); Keddy et al. (1996)	Feminist / critical; power, gender, and embodiment foregrounded	Incorporates feminist standpoint epistemology; attention to marginalised experiences; reflexivity as ethical obligation	Women's health, gender studies, caregiving research

Core Procedures of Grounded Theory Research

The procedural distinctiveness of grounded theory what makes it methodologically different from other qualitative approaches that also use interviews, observation, and iterative analysis lies in the specific combination of constant comparison, theoretical sampling, memo-writing, and theoretical saturation that constitutes its analytical logic. These procedures are not independent techniques that can be borrowed selectively; they form an integrated system whose coherence depends on all components being implemented in relation to each other. Table 3 presents the full twelve-step procedure.

Simultaneous Data Collection and Analysis

The most fundamental procedural principle of GT research is that data collection and analysis occur simultaneously rather than sequentially. The researcher begins analysing the first interview before conducting the second, and the emerging analysis shapes every subsequent sampling and data collection decision. This simultaneity is not a practical convenience but an epistemological necessity: it is the mechanism through which theoretical sampling the direction of further data collection by the requirements of the emerging theory rather than by predetermined demographic or purposive criteria is made possible. A researcher who collects all their data before beginning analysis cannot engage in theoretical sampling and therefore cannot claim to have conducted a full GT study in any of the three major school traditions (Glaser & Strauss, 1967; Charmaz, 2014; Strauss & Corbin, 1998).

Constant Comparison

Constant comparison the systematic comparison of each new piece of data with all previous data and codes is the analytical engine of grounded theory and the procedure that gives it its distinctively iterative, accumulative character. Glaser and Strauss (1967) identified four stages of constant comparison: comparing incidents applicable to each category (establishing the properties and dimensions of each conceptual category), integrating categories and their properties (identifying the relationships between categories), delimiting the theory (reducing the theoretical framework to its essential features), and writing the theory (translating the analytical framework into a coherent theoretical account). In practice, constant comparison operates at multiple levels simultaneously: the researcher compares incident with incident, incident with code, code with code, code with category, category with category, and the emerging theoretical account with existing theories in the literature (in Straussian and constructivist GT). This multi-level comparison produces the conceptual density and theoretical integration that distinguish mature GT theory from preliminary descriptive analysis.

Memo-Writing as the Heart of Analysis

Memo-writing is, in Charmaz's (2014) formulation, 'the pivotal intermediate step between data collection and writing drafts of papers' (p. 162) and is widely regarded as the most important and most frequently neglected component of GT research. Theoretical memos are the researcher's written records of their analytical thinking about what a code means, why two codes might be related, what theoretical concept might integrate a set of categories, what existing theory the emerging analysis resembles or contradicts, and what further data collection would help develop or challenge a specific category. They are written continuously, from the moment of initial coding onward, and they constitute the primary evidence trail through which the movement from data to theory can be traced and evaluated. Clarke (2005) adds memo-writing specifically for situational, social worlds, and positional maps, using visual mapping as an analytical tool that generates theoretical memos through the act of charting the complexity of the research situation.

Theoretical Sampling and Saturation

Theoretical sampling directing further data collection to where it will most productively develop, elaborate, or challenge emerging categories is the procedure that gives GT its distinctive iterative design logic. Unlike purposive sampling in other qualitative methods, which is determined at the design stage on the basis of the research question, theoretical sampling is driven by the evolving analysis and cannot be fully specified in advance. A researcher conducting a GT study of professional identity formation in medical education, for example, might begin with junior doctors in training, then follow the emerging category of 'identity threat' to senior doctors whose professional identity has been challenged by organisational change, then to retired doctors reflecting on career-long identity negotiations not because these groups were identified as important before data collection began but because the emerging theory required data that would develop, complicate, and ultimately saturate specific theoretical categories. Theoretical saturation the point at which additional data collection contributes no new properties or dimensions to existing theoretical categories is the GT criterion for deciding when to stop sampling. Fusch and Ness (2015) distinguish between data saturation (no new data) and theoretical saturation (no new theoretical insights), arguing that the former is a necessary but insufficient condition for the latter. Morse (2015) emphasises that saturation is category-specific some categories may be saturated while others require further development and cannot be determined by a fixed sample-size threshold. The empirical literature on saturation in GT suggests that theoretical saturation typically requires between 20 and 60 interviews, depending on the conceptual complexity of the phenomenon, the homogeneity of the sample, and the depth of analysis applied to each data item (Charmaz, 2014; Morse, 2015).

Table 3 Core Procedures of Grounded Theory Research

Note. Compiled from Glaser and Strauss (1967), Strauss and Corbin (1990, 1998), Charmaz (2014), and Clarke et al. (2018).

Step	Procedure	Key Activities and Methodological Rationale
1	Literature engagement	Classic GT defers literature review until after theory generation to avoid 'contamination'; Straussian and constructivist GT integrate literature iteratively as sensitising concepts and theoretical comparison; researchers must specify their position explicitly
2	Initial sampling	Purposive theoretical sampling from the outset; first participants/sites selected because they are most likely to illuminate the phenomenon; sampling decisions driven by emerging analysis, not predetermined demographic logic (Glaser & Strauss, 1967; Charmaz, 2014)
3	Data collection	Semi-structured or unstructured interviews most common; also observation, documents, visual data ('All Is Data' in classic GT); interviews conducted with minimal prior structuring to allow theoretical emergence; contemporaneous field notes essential
4	Initial/open coding	Line-by-line or incident-by-incident coding of first data; codes

		stay close to data language; gerund (action-focused) coding recommended in constructivist GT; generate as many codes as possible at this stage (Charmaz, 2014; Strauss & Corbin, 1990)
5	Constant comparison	Each new piece of data systematically compared with all previous data and codes; similarities and differences identified; conceptual categories begin to emerge from repeated comparisons (Glaser & Strauss, 1967)
6	Memo-writing	Theoretical memos written throughout from initial coding onward; memos capture the analyst's thinking about codes, categories, relationships, and emerging theory; most important analytical tool in GT (Charmaz, 2014; Clarke, 2005)
7	Focused/axial coding	Most significant initial codes elevated to focused codes that categorise larger data segments; in Straussian GT, axial coding identifies conditions, actions/interactions, and consequences of each category (Strauss & Corbin, 1990; Charmaz, 2014)
8	Theoretical sampling	Further data collection specifically targeted to develop, saturate, and test emerging categories; participants/sites selected because they can provide data that refines the theory not for representativeness (Glaser & Strauss, 1967; Charmaz, 2014)
9	Theoretical saturation	Sampling continues until new data add no new properties or dimensions to existing categories; saturation is category-specific and theory-dependent, not a fixed sample-size threshold (Fusch & Ness, 2015; Morse, 2015)
10	Selective coding / core category	A core category identified that accounts for most variation in the data; all other categories integrated around this core; in classic GT this produces a 'basic social process'; in constructivist GT a 'theoretical conceptualisation' (Glaser, 1978; Charmaz, 2014)
11	Theory construction and sorting	Memos sorted into a theoretical argument; relationships between categories specified; the resulting theory is grounded (derived from data), dense (well-developed categories), and integrative (categories connected around the core)
12	Literature integration and reporting	In Straussian and constructivist GT, existing literature compared with the generated theory at the write-up stage; gaps, confirmations, and contradictions with prior theory documented; theory presented with its grounding evidence

Comparative Analysis of the Three Major Grounded Theory Schools

The methodological differences between the Glaserian, Straussian, and constructivist schools of grounded theory are substantial enough to produce different research designs, different analytical procedures, different theory outputs, and different quality criteria from the same foundational commitments. Table 4 provides a systematic comparison across nine dimensions, enabling researchers to make an informed and explicit school selection rather than the unreflective mixing of procedures from different traditions that characterises a significant proportion of published GT studies. The most practically consequential difference between the schools concerns the role of prior theory and literature. Glaserian GT prohibits engagement with prior theoretical literature before data collection and early analysis, on the grounds that theoretical preconceptions

contaminate the emergence of grounded theory from data. This position has been consistently criticised including by Strauss and Corbin (1990) on the grounds that it is impossible to approach data without theoretical assumptions and that the prohibition produces not an absence of theoretical preconceptions but an unexamined set of them. Constructivist GT's integration of sensitising concepts existing theoretical ideas used as analytic lenses that are open to revision through engagement with data offers a methodologically honest and practically useful alternative that preserves the inductive orientation of GT while acknowledging the inevitably theory-laden character of observation and analysis (Blumer, 1969; Charmaz, 2014). A second major dimension of difference concerns the quality criteria appropriate to each school. Glaser's (1978) original criteria fit, work, relevance, and modifiability reflect the objectivist epistemology of classic GT: a good theory is one that accurately represents the social reality from which it was generated (fit), explains and predicts what happens in that reality (work), addresses the central concerns of the participants (relevance), and can be revised when new data require (modifiability). Charmaz's (2014) revised criteria credibility, originality, resonance, usefulness, and in her 2006 edition also transferability reflect the constructivist epistemology of her approach: a good theory is one that is grounded in the data (credibility), offers fresh conceptual insights (originality), resonates with the experiences of both participants and readers (resonance), and has practical and theoretical utility (usefulness). These are not merely terminological differences; they reflect genuinely different understandings of what theory is, what it is for, and how its quality should be evaluated.

Table 4 *Comparison of Three Major Grounded Theory Schools on Key Methodological Dimensions*

Note. Compiled from Glaser (1978, 1992), Strauss and Corbin (1990, 1998), and Charmaz (2014).

Dimension	**Classic GT (Glaser)**	**Straussian GT (Strauss & Corbin)**	**Constructivist GT (Charmaz)**
Ontology	Realist: a single reality exists and theory should reflect it	Post-positivist: reality is probabilistic; theory verifies and specifies conditions	Constructionist: realities are multiple and co-constructed; theory is an interpretation
Role of researcher	Neutral conduit; prior knowledge bracketed; emergence paramount	Active analyst; paradigm model guides analysis; verification sought	Co-constructor; reflexivity documented; positionality shapes theory
Literature review timing	After theory generation to avoid forcing	Before and during, as sensitising framework	Iteratively integrated throughout as theoretical comparison
Coding terminology	Substantive & theoretical codes; 18 coding families	Open, axial, selective coding; conditional matrix; paradigm model	Initial, focused, axial, theoretical coding; gerund emphasis
Saturation	Theoretical saturation:	Theoretical saturation:	Theoretical

concept	category development complete	same as Glaser	sufficiency: pragmatic, reflexive judgement of adequacy
Memo-writing	Central from outset; theoretical memos drive theory building	Important but more structured; category memos linked to paradigm model	Elevated to primary analytical tool; reflexive and theoretical memos distinguished
Theory output	Formal or substantive theory; basic social process (BSP)	Substantive theory with conditions, context, actions, consequences specified	Theoretical conceptualisation; abstract-analytic account of social process
Quality criteria	Fit, work, relevance, modifiability (Glaser, 1978)	Credibility, originality, resonance, usefulness (Corbin & Strauss, 2015)	Credibility, originality, resonance, usefulness, transferability (Charmaz, 2014)

Rigour and Quality in Grounded Theory Research

Rigour in GT research cannot be evaluated by generic qualitative quality criteria alone because GT makes specific claims about theory generation that require specific forms of evidential warrant. The most fundamental quality requirement and the most frequently violated in published GT studies is the demonstration that the theoretical claims made in the paper are genuinely grounded in the data from which they were generated. This requires not merely the presentation of representative quotations alongside theoretical categories but an account of the analytical process through which the data gave rise to those categories: the memo trail, the theoretical sampling decisions, the saturation evidence, and the integration logic that connects specific data to specific theoretical claims. Credibility in GT research is established primarily through the depth and rigour of constant comparison and theoretical sampling. A study that demonstrates that all coded data were compared with each other, that theoretical sampling decisions were explicitly made and documented in response to emerging analysis, and that saturation was assessed category by category rather than declared at a predetermined sample size has established the procedural foundation for credibility. Member-checking in GT is methodologically different from member-checking in other qualitative methods: rather than verifying that the researcher's interpretations match participants' self-understandings (which might conflict with GT's theoretical abstraction), GT member-checking typically involves presenting emerging theoretical categories to participants to assess whether they resonate with the participants' experience and whether they illuminate aspects of that experience that participants had not previously articulated a form of resonance checking rather than verification (Charmaz, 2014). Originality is a quality criterion that is specific to GT and that reflects the method's theoretical ambitions: a GT study that produces categories and theoretical relationships that were already well-established in the prior literature has not achieved the methodological goal of generating grounded theory, even if it has produced rigorous descriptive findings. Charmaz (2014) requires that GT researchers ask of their theoretical output: does this offer new conceptual insights, fresh ways of understanding the phenomenon, or empirically grounded

modifications of existing theory? If the answer is no, the study may be a rigorous qualitative description but it is not a successful GT study.

Ethical Considerations in Grounded Theory Research

Grounded theory's iterative, emergent design generates specific ethical challenges that are distinct from those of research designs in which the data collection plan is fully specified in advance. The most consequential is what might be called the ethics of theoretical emergence: because GT's data collection directions are shaped by the evolving analysis rather than by a predetermined protocol, participants who consented to one form of research participation may find themselves involved in a study whose focus has shifted significantly from the one described in the initial consent documents. Researchers must address this through processual consent an ongoing process of consent renegotiation as the theoretical sampling logic shifts the focus and scope of the inquiry and through transparency about the emergent character of the GT design in the original consent documentation (Charmaz, 2014). A second ethical challenge specific to GT concerns the handling of sensitive theoretical categories that emerge unexpectedly from the data. Because GT researchers follow the data wherever it leads the 'all is data' principle of classic GT, modified but not abandoned in constructivist and situational variants they may find themselves theorising phenomena that participants did not anticipate being the focus of research and that may be sensitive, stigmatising, or potentially harmful if published without adequate protection of participant anonymity. The standard anonymisation procedures of qualitative research may be insufficient for GT studies that generate highly specific theoretical categories based on distinctive individual experiences, and researchers must think carefully about the relationship between theoretical precision and participant protection in the representation of their findings. The ethics of representation in situational analysis extends beyond individual participants to include organisations, institutions, and discursive formations whose positions and interests are charted in situational and social worlds maps. Clarke et al. (2018) recommend what they call an 'analytics of implicated actors' systematic attention to who is affected by the situation under study but absent or silenced in the data as both an analytical and an ethical obligation. This is particularly relevant for GT studies of digital platforms, AI governance, and media policy, where the most powerful actors in the situation are frequently the least accessible as research participants.

Advantages and Limitations of Grounded Theory

The primary advantage of grounded theory the one that justifies its methodological complexity and resource demands is its capacity to generate theory that is simultaneously empirically grounded and conceptually powerful. No other qualitative method produces theory of equivalent density, systematicity, and explanatory scope from qualitative data. This theoretical output is GT's unique contribution: studies that identify a basic social process (Glaserian GT), a conditional matrix of actions and consequences (Straussian GT), a constructivist theoretical conceptualisation (Charmaz), or a situational map of discursive positions and social worlds (Clarke) produce a different and deeper form of knowledge than studies that identify themes, describe experience, or produce interpretive cultural accounts. Table 5 provides a systematic comparison of advantages and limitations. The method's principal limitations are its procedural complexity, time demands, and the barriers to entry created by the multiplicity of methodologically distinct schools. A researcher who selects GT without understanding the differences between the schools, who claims to follow Charmaz but uses Straussian coding procedures, or who declares saturation on the basis of a twelve-interview dataset is not

conducting rigorous GT research they are using GT terminology to confer methodological prestige on a study that does not meet the method's procedural requirements. The prevalence of such studies in the published literature has been well documented (Nathaniel, 2012; Thornberg, 2012) and represents a significant quality challenge for the field.

Table 5 *Comparative Overview of Advantages and Limitations of Grounded Theory*

Note. Compiled from Charmaz (2014), Glaser and Strauss (1967), Clarke et al. (2018), and Thornberg (2012).

Advantages	**Limitations**
Generates theory grounded in empirical data rather than imposing pre-existing frameworks	Time and resource intensive: theoretical sampling, constant comparison, and saturation require sustained, iterative fieldwork
Particularly powerful for under-theorised phenomena where no adequate conceptual framework exists	Methodological complexity: three major schools with different procedures create confusion for novice researchers
Constant comparison and theoretical sampling produce conceptually dense, well-developed theory	The Glaser–Strauss split creates irreconcilable procedural differences; researchers must commit to one school explicitly
Theoretical saturation provides a principled, analytically grounded criterion for sample-size decisions	Saturation is difficult to assess reliably; research shows wide variation in how and when saturation is claimed
Applicable across diverse data types: interviews, observation, documents, visual data, digital traces	Risk of premature closure: researchers under time pressure may claim saturation before categories are fully developed
Iterative design allows unexpected phenomena to reshape the direction of inquiry mid-study	Requires simultaneous data collection and analysis, challenging within institutional research timelines
Constructivist and situational variants accommodate marginalised voices, power, and discourse	Theory may be too context-specific to transfer to other settings without further theoretical development
Well established across health, education, management, sociology, and increasingly digital research	AI-assisted coding raises validity concerns: LLMs may generate codes that look like GT but lack conceptual depth

Applications across Disciplines

Grounded theory has achieved its broadest and most consistent application in nursing and health research, where the Straussian tradition in particular established a significant institutional presence through the work of Juliet Corbin and the nursing theorists who adopted and adapted GT procedures for health science research. Studies of chronic illness experience, clinical decision-making, patient–provider communication, nursing practice, and health system implementation have used GT to generate theoretical accounts of social processes that were previously understood only at a descriptive level. Kearney's (2001) systematic review of GT studies in nursing identified the basic social processes most commonly identified in the literature struggling, managing, balancing, negotiating and noted that the most influential GT studies in

nursing shared a focus on the social and interactional processes through which people manage difficult or complex life circumstances. In education research, constructivist GT has been particularly influential in studies of teacher professional development, student identity formation, and the social processes of school culture and classroom interaction. The method is well-suited to educational research questions that concern how teachers and students make sense of their experiences over time how a beginning teacher constructs a professional identity through the first years of practice, or how a student navigates the social world of a new school because its iterative, process-focused design captures the dynamic, temporally extended character of identity and learning processes better than cross-sectional methods. In management and organisational research, GT has been used extensively for the study of organisational change, leadership, innovation, and knowledge management. Eisenhardt's (1989) framework for case-based theory building, which draws on GT's constant comparison and theoretical sampling logic while adapting it for multi-case organisational research, has been enormously influential in the management literature and represents one of the most productive methodological extensions of the original GT framework. More recently, constructivist and situational GT have been applied to the study of digital transformation, platform governance, AI adoption in organisations, and the social processes of algorithmic decision-making areas where the absence of adequate theoretical frameworks makes GT's theory-generative ambition directly relevant. In media studies, communications research, and digital governance domains directly relevant to the research agenda of NLP, AI ethics, and disinformation analysis situational analysis has become an important methodological tool for mapping the discursive landscape of contested policy issues. Clarke et al.'s (2018) worked examples include studies of genomics policy, drug regulation, and digital health governance, demonstrating the method's capacity to chart the full complexity of a policy situation including the non-human actants, discursive formations, and structural conditions that shape policy outcomes in ways that conventional GT cannot. For researchers studying AI governance, platform regulation, or disinformation response policies, situational analysis provides a methodological framework capable of integrating the analysis of policy texts, regulatory discourses, technical architectures, and stakeholder positions into a coherent theoretical account.

Comparison with Other Qualitative Methods

Grounded theory's comparative positioning relative to other qualitative methods is most sharply defined by its theoretical ambitions and its iterative, simultaneously generative and analytic design logic. Table 6 provides a systematic comparison across nine dimensions with thematic analysis, narrative inquiry, ethnography, and interpretive phenomenological analysis. The most important contrast is with thematic analysis, with which GT is most frequently confused in the published literature. Both methods use coding procedures, both produce pattern-based accounts of qualitative data, and both have been applied across a wide range of data types and research contexts. But they differ fundamentally in their analytical goals and their procedural logic: thematic analysis identifies patterns of meaning across a dataset and produces a thematic account of those patterns, while GT generates theory about social processes through constant comparison, theoretical sampling, and saturation and produces a theoretical account of how and why those processes operate as they do. A study that codes an interview dataset, groups codes into themes, and reports the resulting themes as a 'grounded theory' has produced a thematic analysis, not a GT study, regardless of the coding procedures used. The comparison with ethnography is instructive because the two methods share a commitment to holistic, contextually grounded, process-oriented inquiry that distinguishes them both from the pattern-identification logic of

thematic analysis and the experience-illumination logic of IPA. The key difference is in the relationship between data collection and theoretical development: ethnography uses prolonged immersive fieldwork to generate a thick, holistic account of social life in a specific setting, while GT uses iterative theoretical sampling to generate a conceptually dense theoretical account of a specific social process. An ethnographic study and a GT study of the same phenomenon say, the professional socialisation of junior doctors would produce different knowledge: the ethnographic study would produce a thick account of how socialisation unfolds in practice, what is valued and what is penalised, how identities are negotiated in specific interactions; the GT study would produce a theoretical account of the social process of professional identity construction, its conditions, its mechanisms, and its consequences, with sufficient abstraction and integration to illuminate similar processes in other professional contexts.

Table 6 *Comparison of Grounded Theory With Other Qualitative Research Methods*

Note. Compiled from Charmaz (2014), Braun and Clarke (2021), Clandinin and Connelly (2000), and Hammersley and Atkinson (2007)

Dimension	**Grounded Theory**	**Thematic Analysis**	**Narrative Inquiry**	**Ethnography**	**Phenomenology (IPA)**
Primary goal	Generate substantive or formal theory of a social process	Identify patterned meanings across dataset	Illuminate biographical experience and identity over time	Understand culture and practice in natural settings	Understand lived experience of a specific phenomenon
Epistemological home	Pragmatist / constructionist (Charmaz); objectivist (Glaser)	Flexible across paradigms	Constructionist; phenomenological; hermeneutic	Interpretivist; critical realist	Phenomenological; ideographic
Sampling logic	Theoretical sampling driven by emerging analysis	Purposive; saturation-based	Purposive; relational; small N	Purposive; prolonged engagement	Purposive; homogeneous; small N (3–10)
Typical sample size	20–60+ (theoretical sampling continues until saturation)	6–30+	1–10 (deep biographical focus)	1–3 sites over months/years	3–10 participants
Data collection	Interviews, observation, documents, visual data	Any qualitative data type	Life history interviews, field texts, artefacts	Participant observation, field notes, interviews	Semi-structured interviews

Core analytical move	Constant comparison → theoretical sampling → saturation → theory	Code → theme → narrative account	Story-by-story then cross-story analysis	Thick description; interpretive cultural analysis	Experiential themes → superordinate themes → cross-case
Theory output	Substantive or formal grounded theory	Thematic map and analytical narrative	Narrative account of identity and experience	Interpretive cultural account	Experiential account of a phenomenon
Best use context	Unexplored or under-theorised social processes	Pattern identification across sample	Identity, biography, illness, change over time	Practice, culture, institutional life	Individual lived experience of a specific phenomenon

Recent Trends and Emerging Developments

Abductive GT and the Turn to Explanation

The recognition that GT's analytic logic is better characterised as abductive than inductive has produced a significant and productive shift in how the method's theoretical outputs are understood and evaluated. Timmermans and Tavory's (2012) influential paper 'Theory Construction in Qualitative Research: From Grounded Theory to Abductive Analysis' argues that rigorous GT, when its analytic logic is examined carefully, involves not the simple generalisation of observed patterns (induction) but the inference of the most theoretically coherent explanation for surprising or puzzling empirical observations a form of reasoning that Peirce called abduction and that is characteristic of scientific discovery across disciplines. This abductive reframing has significant implications for how GT researchers present and justify their theoretical contributions: the claim is not merely that a pattern has been observed and coded but that a specific theoretical account best explains why the observed pattern takes the form it does, and that this explanation has been systematically tested against the full range of data through constant comparison and theoretical sampling.

Situational Analysis in Digital and Policy Research

Clarke et al.'s (2018) Situational Analysis in Practice, with its detailed worked examples across science studies, health research, and social policy, has substantially expanded the application of situational analysis beyond the health sociology contexts in which it was originally developed. The method's capacity to chart the full situational complexity of contested policy and governance issues mapping all relevant human and non-human actants, all significant social worlds and discursive formations, and all positions taken on contested issues without forcing premature analytical closure makes it particularly well-suited to the study of digital governance, AI regulation, and platform accountability. For researchers analysing the discursive construction of AI policy, the social worlds of platform governance, or the positional landscape of data protection regulation, situational analysis provides a methodological framework that integrates the depth of GT's iterative analysis with the breadth of discourse analysis and the visual clarity of mapping techniques.

AI-Assisted Grounded Theory Coding

The integration of AI tools into GT research has accelerated significantly since the introduction of AI coding modules in NVivo and ATLAS.ti and the widespread availability of large language models for qualitative data analysis. The methodological question of whether and how AI tools can legitimately support GT coding and memo-writing is more complex for GT than for other qualitative methods, because the theoretical ambitions of GT place greater demands on analytic depth and interpretive rigour than methods oriented toward description or pattern identification. Barrera et al. (2025) report that AI-assisted first-pass coding can efficiently generate candidate codes from interview data that are broadly coherent with human analyst codes for manifest content, but that the theoretical codes the codes that identify the conceptual relationships and explanatory mechanisms at the heart of GT theory require the kind of abductive, theoretically informed reasoning that current LLMs cannot perform reliably. Memo-writing, the primary vehicle through which GT's theoretical reasoning is developed and made explicit, remains a distinctively human intellectual task that AI tools can prompt and organise but cannot authentically generate. A specific concern in AI-assisted GT is what might be called theoretical premature closure: the risk that AI-generated code suggestions lead researchers toward the categories that are most linguistically visible in the data the categories that correspond to topics explicitly discussed by participants rather than toward the theoretical categories that explain the process underlying those topics. GT's most significant theoretical contributions have typically come from noticing what participants do not say, from identifying the structural conditions that shape what is possible within a social situation, and from recognising the conceptual relationships between superficially unrelated empirical observations forms of analysis that require the kind of sustained, theoretically informed attention to the full dataset that AI tools currently provide only in a rudimentary way.

GT in Mixed Methods and Computational Social Science

The integration of GT with quantitative and computational methods in mixed methods and computational social science designs has produced some of the most methodologically innovative recent work in the GT tradition. Exploratory sequential mixed methods designs in which GT generates theoretical categories that are subsequently operationalised in survey instruments a form of the mixed methods exploratory sequential design discussed in Paper 4 of this series represent the most established integration, and have been used productively in health, education, and management research to develop conceptually grounded measurement instruments that address the limitations of instruments derived deductively from prior theory. More recently, the combination of GT with corpus linguistics and natural language processing using computational analysis of large text corpora to identify the discursive landscape within which specific social processes operate, then using GT to generate theoretical accounts of the mechanisms at the level of individual and organisational action represents a frontier application of GT to the kind of large-scale digital data environments that characterise contemporary media, platform governance, and AI policy research.

Conclusion

Grounded theory has endured for nearly six decades as one of the most influential and productive methodological traditions in qualitative social science because it addresses a genuine epistemological need that no other qualitative method fully meets: the need for rigorous, systematic procedures for generating conceptually dense, empirically grounded theory about social processes from qualitative data. The method's founding insight that rigorous theory can

be generated inductively from careful engagement with empirical data, and that such theory has epistemic advantages over theory derived from armchair speculation or imported without modification from adjacent disciplines remains as significant and as contested today as it was in 1967. The half-century of productive methodological development since the Discovery the Strauss and Corbin reformulation, the Glaserian critique, Charmaz's constructivist turn, Clarke's situational analysis, the abductive reasoning reframing, and the emerging debates about AI assistance has produced a richer, more philosophically sophisticated, and more methodologically diverse GT tradition than Glaser and Strauss could have anticipated. This diversity is a methodological asset, not a sign of theoretical confusion: the different GT schools address different research questions, from different philosophical positions, for different research purposes, and the existence of multiple well-developed variants makes GT adaptable to a wider range of inquiry contexts than any single-school tradition could accommodate. The fundamental requirement remains what it has always been: to conduct GT with methodological integrity means committing to a specific school, implementing its procedures with genuine fidelity, producing theoretical outputs that are grounded in the data through demonstrably rigorous constant comparison and theoretical sampling, and representing the resulting theory with sufficient evidential grounding to allow readers to evaluate its analytic claims. GT conducted with that integrity remains one of social science's most powerful tools for generating theory that is simultaneously rooted in the complexity of lived experience and capable of illuminating the social processes that structure it.

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