

Striving for Rigour in Qualitative Case Study Research: A Contextualised Guide for Early-Career Researchers in the Global South

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Abstract

This paper offers a contextually grounded guide for enhancing rigour in qualitative case study research, focusing on early-career researchers in the Global South. Using an integrative approach that combines systematic literature synthesis with reflective scholarly practice, it adapts established strategies to resource-constrained and culturally complex settings. Rigour is conceptualised as a context-sensitive, iterative process spanning research design, data collection, analysis, and reporting. The paper connects these strategies with practical tools, such as reflexivity journals, triangulation matrices, and coding checklists, while addressing constraints including linguistic diversity, infrastructure, cultural norms, and security risks. Its contribution is a contextualised synthesis of established methodological practices that provides conceptual clarity and practical guidance for credible qualitative research in the Global South.

Keywords

qualitative case study research, qualitative rigour, global South, research trustworthiness, reflexivity, triangulation, pitching research template

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Introduction

This paper offers practical, stage-by-stage recommendations for embedding rigour in qualitative case study research in the resource- and opportunity-constrained Global South. Because qualitative case study research provides a rich, in-depth means of exploring complex social phenomena within their real-world contexts, it is particularly valuable in the Global South, where research environments are shaped by distinctive socio-cultural, political, and institutional factors (Abdulai & Owusu-Ansah, 2014; Khan, 2023; Phiri, 2023). However, ensuring methodological rigour in such settings is highly challenging for

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researchers not just because they must contend with real resource constraints, but also because of other binding impediments, including culturally sensitive access protocols and potential participant mistrust. These issues can undermine credibility, dependability, and confirmability if not carefully addressed (Adegbite et al., 2021; Khan, 2023; Nyamnjoh, 2022).

While foundational works on case study methodology, such as Tisdell et al. (2025) and Yin (2009), provide general principles for case study research, they often reflect Global North assumptions and do not sufficiently account for the contextual complexities of the Global South (see Rashid et al., 2019). This creates a pressing need to identify feasible methodological approaches that achieve rigour through strategies sensitive to local realities (Abdulai & Owusu-Ansah, 2014; Ndlovu-Gatsheni, 2021). Our goal is to address this pressing need. To this end, drawing on contemporary debates and empirical insights, this paper outlines strategies such as triangulation (Carter et al., 2014; Farquhar et al., 2020), reflexivity (Berger, 2015), and structured member checking (McKim, 2023), all tailored for resource-constrained, culturally diverse research settings. As such, this study is conceptual in nature and does not present primary empirical data. Our goal is to equip novice and experienced researchers with tools to conduct credible, contextually grounded case studies in the Global South.

To clarify the contribution and methodological positioning of this paper, we emphasise that it does not seek to develop entirely new methodological tools. Rather, the manuscript contributes by combining systematic literature synthesis with reflective scholarly practice. Through this approach, we consolidate, reinterpret, and adapt established rigour-enhancing strategies, such as triangulation, reflexivity, and member checking, within the specific contextual conditions of the Global South. This positioning responds to the need for clearer translation of abstract methodological principles into practical, context-sensitive guidance for researchers working in resource-constrained and culturally complex environments.

This methodological guide makes a distinct contribution by foregrounding the rigour in qualitative research, which is not universal but contextual. Much of the established literature on qualitative rigour—developed primarily in Global North contexts—presumes infrastructural stability, linguistic homogeneity, and egalitarian research relationships (Gioia et al., 2013; Tracy, 2010). By contrast, these assumptions often do not hold in many Global South settings, where power asymmetries, infrastructural volatility, and linguistic plurality are common (Azeez et al., 2025; Brown et al., 2024; Ojukwu et al., 2015; Orole, 2020). By framing rigour as a situated and adaptive practice, this guide aligns with and extends critical perspectives in qualitative methodology. Rather than viewing rigour as a fixed set of procedures to be mechanically applied across studies, we argue that it must be responsive to the social, political, and material conditions under which research is conducted. For example, in multilingual fieldwork settings, bilingual data collection and collaborative interpretation are not merely logistical adaptations—they are epistemological choices that uphold credibility and meaning accuracy (Chen & Boore, 2010; Mazonde & Carmichael, 2020; Ragavan & Cowden, 2020).

We also contribute to methodological pluralism by showing how constructivist, post-positivist, pragmatist, and transformative paradigms can each operationalise rigour in ways that are philosophically consistent yet contextually sensitive. Such a pluralistic approach is especially critical in the Global South, where methodological orthodoxy can inadvertently reinforce epistemic hierarchies or exclude culturally embedded ways of knowing (Berger, 2015; Mertens, 2019). In essence, this guide pushes back against monolithic notions of validity, dependability, or confirmability. Instead, it offers a more reflexive, flexible, and inclusive understanding of what rigorous qualitative research entails in diverse global contexts.

Paradigms and Practicalities: Rigour in Global South Qualitative Research

Rigour in qualitative research is often evaluated using criteria such as credibility, transferability, dependability, and confirmability (Korstjens & Moser, 2018; Lincoln & Guba, 1985). While these principles are well-established, their practical implementation varies significantly across paradigms. For example, constructivist researchers tend to prioritise prolonged engagement and the co-construction of meaning with participants, while post-positivists emphasise systematic procedures such as structured coding and inter-coder reliability to minimize bias (Cole, 2024; Gioia et al., 2013; Patton, 2002). Meanwhile, pragmatist paradigms often blend these approaches, focusing on methodological appropriateness over strict philosophical allegiance (Tracy, 2010). Recent literature highlights the need to embed rigour-enhancing strategies throughout the research process rather than applying them retrospectively (Patterson et al., 2023). Triangulation—through data sources, methods, or investigators—has been shown to enhance thematic validity, particularly in organisational research (Farquhar et al., 2020; Jonsen & Jehn, 2009). Similarly, member checking strengthens interpretive trustworthiness, especially in contexts where power asymmetries or language barriers may distort meaning (Krampe et al., 2022; McKim, 2023).

However, these well-established qualitative methods are not always easily applied in the Global South (Cyress, 2017; Hoskins et al., 2025; Mazonde & Carmichael, 2020; Ngozwana, 2018; Oppong, 2017; Rashid et al., 2019; Thompson & Lindo, 2024). These settings often involve linguistic plurality, infrastructural limitations, and cultural norms that influence participation (Chalmers & Murphy, 2021). For example, researchers might work in multilingual communities that require translation and interpretation, potentially leading to a loss of nuance or meaning (Krampe et al., 2022). Infrastructural barriers, such as unreliable internet, limited recording equipment, or transport difficulties, can delay data collection and compromise

quality (Abdulai & Owusu-Ansah, 2014; Adegbite et al., 2021; Purohit et al., 2026). Culturally embedded hierarchies and norms could also require community leader approval before participants engage in research, affecting sampling strategies (Chigevenga, 2022; Halme et al., 2024; Israel et al., 2019; Mtisi, 2022; Ndlovu-Gatsheni, 2021; Shulist, 2025). Moreover, these issues can easily lead to downstream consequences that are obscured by the research design and the tools and methods used to analyse the data. Ultimately, the credibility and reliability of case study outcomes are seriously jeopardised, especially in these Global South contexts. Moreover, research credibility is a core pillar of responsible science (Faff, 2021).¹

Importantly, research in the Global South is not merely a different setting but involves distinct structural, cultural, and epistemological conditions that shape the practice of qualitative inquiry. Factors such as resource constraints, linguistic diversity, infrastructural limitations, and culturally mediated access require not just applying but adapting established methodological approaches. This highlights the need for context-sensitive frameworks that move beyond universalised assumptions about rigour. Accordingly, the novelty of this paper lies in its explicit focus on translating and adapting established rigour strategies to the specific constraints and complexities of Global South research contexts. The following sections synthesise these insights into a practical, stage-by-stage methodological guide for achieving rigour in qualitative case study research in the Global South.

Contextual Challenges in the Global South and Rigour Strategies

To enhance conceptual clarity, the challenges of conducting qualitative case study research in Global South contexts are systematically categorised into four interrelated dimensions: security, linguistic, infrastructural, and cultural (see Table 1).² This categorisation is informed by contemporary work showing that data collection in the Global South is shaped by practical, methodological, and philosophical constraints, including resource limitations, local social processes, and the need for contextual adaptation (Brown et al., 2024). It is also supported by research on fieldwork risk and researcher safety in LMICs and conflict-affected settings (Kaplan et al., 2023; Steinert et al., 2021), language barriers and interpreter-mediated research practice (Krampe et al., 2022), and the importance of cultural competence and emic understanding in African and Global South qualitative inquiry (Halme et al., 2024; Mazonde & Carmichael, 2020). These categories provide an analytical structure for understanding how contextual constraints shape research practice.

These challenges are consistent with prior research highlighting the practical, methodological, and philosophical complexities of data collection in Global South contexts (Brown et al., 2024). Brown et al. (2024) emphasise how contextual constraints shape data collection practices and researcher decision-making, reinforcing the need for adaptive and context-sensitive approaches to maintaining rigour. Conducting qualitative research in the Global South entails navigating contextual challenges that, if left unaddressed, may compromise the rigour and credibility of findings. Among the most pervasive challenges are security risks, linguistic diversity, infrastructural limitations, and culturally shaped participation norms, each of which can profoundly influence data collection, analysis, and interpretation (Mwangi et al., 2022).

Table 1. Contextual Challenges

Contextual challenge	Impact on rigour	Rigour dimension affected	Mitigation strategy	Tool
Security risks	Restricted access and sampling limitations	Credibility, Transferability	Remote interviewing, document triangulation	Triangulation Matrix
Linguistic diversity	Meaning distortion during translation	Credibility, Confirmability	Bilingual researchers, back translation	Member Checking
Infrastructure limitations	Data loss and incomplete records	Dependability	Redundancy planning, offline tools	Coding Reliability Checklist
Gatekeeper influence	Social desirability bias	Credibility	Prolonged engagement, indirect questioning	Reflexivity Journal

¹ Faff (2021) argues that there are three inter-related pillars underlying responsible science: (1) credible research – achieved by real rigor that leads to reliable outcomes; (2) relevant research – achieved by a leaning toward real-world problems that leads to useful outcomes; and (3) independent research – achieved by conscious open-minded endeavor that leads to objective outcomes.

² The examples provided in this section are illustrative and intended to demonstrate practical application rather than report empirical findings. These contextual challenges do not inherently compromise research quality; rather, they may affect different dimensions of rigour if not appropriately addressed. Their influence is context-dependent and can be mitigated through adaptive, reflexive, and context-sensitive research practices.

Researchers in the Global South often face severe security risks that restrict fieldwork. In Medellín, Colombia, [Dávila and Doyle \(2020\)](#) reported threats from organized crime and gang violence, forcing reliance on local actors for safe access. Similarly, [Blake \(2020\)](#) described how Jamaica and other Caribbean regions became inaccessible due to gang control and kidnapping threats, necessitating remote interviews. [Christian \(2018\)](#) highlighted that in Sudan, Somalia, Mali-Niger, and Nigeria, insurgencies and terrorism led to ambush risks and researchers' withdrawal from conflict zones. [Thomas et al. \(2022\)](#) found that in armed-group-controlled areas of the Global South, gender-based violence and kidnapping threats required participatory digital methods instead of in-person engagement. Finally, [Dami \(2021\)](#) showed that Northern Nigeria was rendered unsafe by Boko Haram and banditry, compelling researchers to depend on secondary data. Besides, there are deep religious and tribal factors that could mean the exclusion of women in specific contexts where extremist Islam dominates (see [Orole et al., 2026](#)). These cases underscore how terrorism, violence, and kidnapping compromise access, ethics, and methodological rigour in qualitative research ([Blake, 2020](#); [Christian, 2018](#); [Dami, 2021](#); [Dávila & Doyle, 2020](#); [Thomas et al., 2022](#)). In contexts with security concerns, researchers may adapt by anonymising data at the point of collection and limiting the recording of sensitive identifiers.

Linguistic diversity poses a particularly complex obstacle in many research settings. Researchers often encounter multilingual environments where participants switch between languages or dialects during interviews, a process known as code-switching ([Alsheikhidris & Alfatih, 2024](#); [Jones, 2023](#); [Rahmadani, 2023](#)). While previous research (see [Jones, 2023](#); [Ramaila, 2025](#); [Zhong & Ang, 2023](#)) argues that code-switching can subtly influence interpretation and analysis, [Chen and Boore \(2010\)](#) affirm that it makes direct translation insufficient and potentially distorts the intended message. In such contexts, rigour can be reinforced by including bilingual researchers³, who not only understand the linguistic nuances but are also attuned to the socio-cultural connotations embedded in local discourse. The practice of iterative back-translation⁴, where translated text is retranslated into the original language to verify accuracy, further safeguards meaning. Involving cultural insiders in both data collection and analysis also enhances the validity of interpretations, especially in multilingual or Indigenous-language settings (see [Ragavan & Cowden, 2020](#)). Previous studies have adopted these strategies, including [Chen and Boore \(2010\)](#), who used bilingual fieldworkers and iterative back-translation to preserve meaning accuracy.

Infrastructural constraints are another significant challenge. Fieldwork in the Global South is often conducted in areas with unreliable electricity, limited internet connectivity, and a lack of basic recording tools (see [Foster et al., 2023](#)). These disruptions can delay data collection, diminish the quality of recorded interviews, and restrict researcher access to participants ([Lunn, 2014](#)). To address this challenge, researchers must engage in proactive redundancy planning, including the use of backup power sources, offline data collection tools, and multiple recording devices. [McArdie \(2022\)](#) underscores the importance of such technical foresight, noting that methodological flexibility is crucial to maintaining continuity and completeness in resource-limited environments. For example, where digital recording is not feasible due to limited infrastructure, researchers may rely on detailed field notes and immediate post-interview reflections to preserve data accuracy.

Cultural norms also shape the ethical and practical dynamics of research. In hierarchical societies, gaining access to participants often requires permission from local gatekeepers or community leaders, and respondents may be reluctant to express dissenting views due to deference to authority ([Ndlovu-Gatsheni, 2021](#); [Steinert et al., 2021](#)). Mitigating these risks involves building trust through prolonged engagement ([Celestina, 2018](#); [Ngozwana, 2018](#); [Ruiz-Casares, 2011](#)), securing community entry through culturally appropriate protocols, and employing indirect questioning techniques that allow participants to discuss sensitive topics more openly. [Ngozwana \(2018\)](#) illustrates how culturally responsive interviewing can increase authenticity and depth in participant narratives, particularly in collectivist cultures where critique is not commonly voiced.

Collectively, these challenges do not merely represent logistical hurdles but demand a rethinking of what constitutes rigour in qualitative research. Rather than applying rigid, universal criteria, rigour must be reconceptualised as a situated practice, responsive to the linguistic, infrastructural, and cultural realities of each research context ([Berger, 2015](#)). Through adaptive strategies and reflective practice, researchers in the Global South can uphold methodological integrity while remaining attuned to the ethical and epistemological specificities of their settings.

Aligning Paradigm and Rigour

Research paradigms provide the epistemological and ontological scaffolding for qualitative case study research, directly shaping how rigour is defined and operationalised ([Guba & Lincoln, 1994](#)). Each paradigm offers a distinct orientation toward knowledge, influencing the selection of data collection methods, analysis strategies, and validation techniques. For

3 Employing bilingual researchers means involving team members who can work fluently in both the local language and the research/reporting language, ensuring accuracy in capturing and interpreting data.

4 Conducting back-translation is the process of translating data into another language and then re-translating it back into the original language by a different translator, to check that the meaning has not been lost or distorted.

example, a constructivist stance emphasises co-created meaning between researcher and participants (Knight, 2025), while a critical paradigm focuses on uncovering power dynamics and promoting change. A post-positivist paradigm seeks to approximate truth through careful observation and systematic inquiry. For novice researchers, especially in the Global South, recognising these distinctions is critical. To operationalise rigour, it is essential to explicitly state the chosen paradigm, explain its relevance to the research problem, and align methodological decisions with its assumptions. Table 2 Summarises the characteristics of major qualitative paradigms, offering concrete strategies for embedding rigour and contextual illustrations from Global South settings.

Embedding Rigour Across the Research Cycle

Rigour is not a post hoc validation, but an integral, ongoing commitment embedded in each phase of the research process. As Gioia et al. (2013) caution, rigour must be “built into the research design from the outset” (p. 17). Drawing on established and contemporary best practices, this methodological guide provides a step-by-step framework to operationalise rigour in case study research.⁵

Table 2. Paradigm-Specific Strategies for Rigour

Paradigm	Key assumptions	Strategies to ensure rigour	Example (Global South)
Constructivist (Lincoln & Guba, 1985; Tracy, 2024)	Reality is socially constructed; emphasis on co-created meanings	Prolonged engagement (Lincoln & Guba, 1985; Tracy, 2024; Nowell et al., 2017); persistent observation (Patton, 2002); iterative member checking (Birt et al., 2016; McKim, 2023); reflexivity journals (Berger, 2015; Dodgson, 2019)	Collaborating with community co-researchers to interpret multilingual interview data.
Post-Positivist (Denzin & Lincoln, 2018; for foundational perspectives)	Reality exists, but can only be imperfectly understood	Structured coding frameworks (Gioia et al., 2013; O'Connor & Joffe, 2020); audit trails (Noble & Smith, 2015; Nowell et al., 2017); inter-coder reliability checks (Campbell et al., 2013; Cole, 2024; MacPhail et al., 2016)	Employing multiple coders to reduce bias in interview interpretation
Pragmatist (Kaushik & Walsh, 2019; Morgan, 2014)	Knowledge is judged by utility and consequences.	Mixed-methods triangulation (Archibald, 2016; Carter et al., 2014; Farquhar et al., 2020); flexible design adaptation (Levitt et al., 2018; Tracy, 2010); stakeholder feedback loops (Birt et al., 2016; Creswell & Creswell, 2017; McKim, 2023)	Combining interviews and policy documents to study infrastructure projects.
Transformative (Fletcher, 2017; Mertens, 2007, 2019)	Research should promote social justice and address inequities	Participatory methods (Cornwall & Jewkes, 1995; critical reflexivity (Berger, 2015; Dodgson, 2019); inclusive sampling (Etikan et al., 2016; Palinkas et al., 2015; Robinson, 2014); advocacy-oriented dissemination (Israel et al., 2010; Wallerstein et al., 2017)	Engaging marginalised communities in participatory workshops on environmental governance.

⁵ One way to try and “lock in” the discipline of research rigor early is to go down the pathway of pre-registered research (e.g., Faff, 2023). While registration is a universal opportunity available to any researchers, particularly for “confirmatory” designs, it would work even for case study research. Moreover, free time-stamped services provided by organizations such as the Open Science Foundation (<https://osf.io/>) are readily accessible to Global South researchers.

Research Design

At this stage, selecting a paradigm should be a deliberate, well-justified decision as it determines how credibility and dependability will be pursued (Guba & Lincoln, 1994). For example, in a constructivist design, rigour might involve prolonged engagement and co-construction of meaning (Charmaz, 2014; Lincoln & Guba, 1985), whereas a post-positivist design favours systematic coding and inter-coder reliability (Campbell et al., 2013; Miles et al., 2020; O'Connor & Joffe, 2020).

Data Collection

This stage is pivotal for ensuring both credibility and ethical integrity (Tracy, 2024). Researchers should incorporate:

Multiple data sources and methods to enable triangulation (Carter et al., 2014; Farquhar et al., 2020). For example, in a resource-constrained setting, a researcher may combine interview data with locally available policy documents and informal community discussions to achieve triangulation despite limited formal data sources.

Structured but adaptive interview protocols, allowing for local contextual adaptation.

Reflexive practices, including peer debriefings and journaling to interrogate researcher assumptions (Berger, 2015). For example, a researcher working in a culturally sensitive environment may maintain a reflexive journal to document how their positionality influences data interpretation and participant interactions (see Mogaji et al., 2026).

Systematic member checking, ensuring participants can meaningfully review and validate interpretations (McKim, 2023). For instance, in linguistically diverse contexts, member checking may be conducted through verbal summaries or follow-up discussions rather than written transcripts to ensure participant understanding and validation.

Data Analysis

Most case study research adopts thematic, content, narrative, or discourse analysis to examine data and derive meaningful insights (Braun & Clarke, 2021; Vaismoradi et al., 2016). However, selecting the most appropriate method depends on the research aim, questions, and the nature of the data (Nowell et al., 2017). Regardless of the method, rigour can be embedded by: (1) maintaining an audit trail to document analytical decisions (Nowell et al., 2017), and (2) conducting inter-coder reliability checks where applicable (Campbell et al., 2013). We also suggest that thematic saturation should be approached with transparency, documenting the rationale for determining when no new insights emerge. Recent scholarship underscores the need for explicit criteria and evidence in establishing saturation thresholds (see Hennink et al., 2017; Rowlands et al., 2015; Saunders et al., 2018).

Reporting and Reflexivity

Rigorous reporting requires linking interpretations directly to the data, providing thick descriptions, and presenting findings in a manner consistent with the philosophical stance of the chosen paradigm. Rigour could be maintained by:

Using thick descriptions (Alvesson, 2023; Sacks, 2015; Sankofa, 2023; Younas et al., 2023) that enable readers to assess transferability (Forero et al., 2018; Tracy, 2010), and linking interpretations to evidence through rich quotations (Levitt et al., 2018; Nowell et al., 2017).

Explicitly disclosing the researcher's positionality and potential influence on the study (Berger, 2015; Dodgson, 2019; Holmes, 2020; see; Mazonde & Carmichael, 2020).

Maintaining and demonstrating an audit trail that tracks decisions from design through to reporting

Reflexivity is especially crucial in the Global South, where insider-outsider dynamics, linguistic shifts, and power hierarchies may shape both access and interpretation. Continuous reflexive journaling helps monitor how these factors evolve (Berger, 2015; Dodgson, 2019). To illustrate, here is an example of a researcher's positionality and reflexivity from Ahmed et al.'s (2025) recently published paper titled "Mastanocracy: The legitimization of criminal governance and violence in Bangladesh's garment industry".

Throughout this research, we maintained a rigorous and reflexive awareness of our positionality as researchers. This entailed acknowledging our current status as academics in the United Kingdom and critically engaging with our identities as citizens of garment-producing nations, from which we self-initiated expatriation to pursue higher education. Through our 'political reflexivity'..., we actively interrogated how our social locations, lived experiences and broader socio-political contexts shaped the epistemological lenses through which this study was conducted. The first author... was raised in a lower-middle-class household in a Bangladeshi village, then moved to a semi-urban area for secondary education and finally to Dhaka for higher education. His

formative years, spanning from a remote village woven into violence to capital city, were marked by proximate exposure to systemic and pervasive violence, including ‘the intentional use of physical force or power, threatened or actual, against oneself, another person, or against a group or community, that either results in or has a high likelihood of resulting in injury, death, psychological harm, maldevelopment, or deprivation’... The co-authors of this study, both originally from Sri Lanka, offer nuanced perspectives shaped by their lived experiences of violence perpetrated by supporters of ethnocentric political parties and groups during the Sri Lankan Civil War and its aftermath... Their collective positionalities and reflexive engagement with their research roles have been integral to uncovering the complex interplay of power, violence and resistance in the contexts they examine. Together, our collective insights, rooted in witnessing violence perpetuated against marginalized people in our societies and informed by political reflexivity with analytical distance, along with the privilege of no longer being marginalized or exposed to such violence, provide us with a critical lens of ‘insider–outsider perspectives’ ... to explore how mastanocracy underpins violence against marginalized workers in a legal export oriented industry.

As shown above, the approach to reflexivity should be grounded in the understanding that qualitative research is co-constructed between researcher and participant, shaped by cultural norms, relational dynamics, and the research setting. This positional awareness is both methodological and ethical, ensuring that interpretations remain anchored in participants’ voices while situating their experiences within the socio-cultural and structural forces.

Practical Tools and Techniques for Rigour

For novice researchers working in the Global South, translating abstract concepts of rigour into actionable practices can be daunting, given the contextual challenges outlined above. To address this challenge, a range of structured tools has been developed to guide and support rigorous qualitative inquiry. These tools, such as reflexivity journals, triangulation matrices, member-checking protocols, coding reliability checklists, and a case-study adapted version of Faff’s (2015, 2024) pitching research framework (PRF), serve as more than administrative tasks. They serve as epistemic scaffolding, helping researchers maintain transparency, accountability, and coherence throughout the research process.

Reflexivity Journal Template

Reflexivity is not just a theoretical commitment—it is a daily practice. Keeping a reflexivity journal allows researchers to surface their assumptions, emotional responses, and methodological decisions, all of which can shape interpretation (Olmos-Vega et al., 2023). The reflexivity journal offers a space for researchers to document their evolving assumptions, emotional responses, and decision-making processes. We suggest three papers from the Global South that have demonstrated innovative, reflexive practices for navigating cultural complexity. First, Olmos-Vega et al. (2023) provided a practical guide that operationalized reflexivity through journals and collaborative interpretation with local colleagues in Colombia, ensuring cultural alignment and transparency in decision-making. Second, Millora et al. (2020), working in Indonesia, India, and the Philippines, embedded reflexivity in ethical negotiations by documenting positionality and engaging local gatekeepers to reconcile institutional ethics with situated cultural norms. Third, Armstrong et al. (2024) reframed reflexivity as relational cultural work in Pacific Island contexts, using talanoa—a dialogic Indigenous method—to co-create knowledge with cultural insiders, foregrounding decolonial and relational epistemologies. These studies illustrate reflexivity as a dynamic, context-sensitive practice that strengthens rigor through cultural guidance and positional awareness (see Armstrong et al., 2024; Millora et al., 2020; Olmos-Vega et al., 2023).

In resource-constrained or culturally complex contexts, where the researcher’s positionality can significantly shape interpretation, such documentation becomes essential. Recording one’s social position, prior experiences, and potential biases, especially when these intersect with participants’ identities, can help mitigate unconscious influence on analysis (Berger, 2015; Holmes, 2020). For example, a researcher with prior experience in management may unintentionally privilege managerial perspectives over those of frontline workers unless they remain reflexively aware (see Kwan, 2024; Mogaji et al., 2026). Prompts embedded within the journal can guide reflection, such as: “What assumptions might be shaping my interpretation of this narrative?” or “How did my background influence how I phrased that interview question?” Table 3 outlines a structured approach to reflexivity tailored for Global South contexts, emphasizing four sections: researcher’s position, emotional reactions, decisions made, and evolving insights. It includes prompts that address insider–outsider dynamics, hierarchical power relations, and multilingual challenges, such as reflecting on how affiliation with a Global North institution might influence participant openness or how emotions during politically sensitive interviews affect probing depth. By documenting positionality, emotions, and interpretive shifts, researchers enhance transparency and mitigate bias in culturally complex settings (Berger, 2015; Holmes, 2020).

Table 3. Reflexivity Journal Template — Enriched for Global South Contexts

Journal section	Description	Example prompt (Global South)	Supporting literature
Researcher's Position	Document positionality, insider–outsider dynamics, and socio-cultural background	“How might my role as a local academic interviewing government officials in a resource-scarce region influence their openness?” “Does my affiliation with a Global North university create perceived hierarchies among community participants?”	Berger (2015) ; Holmes (2020) ; Chigevenga (2022)
Emotional Reactions	Track emotions and embodied responses during or after fieldwork, especially in inequitable or traumatic contexts	“What emotions arose when participants described experiences of political intimidation?” “Did empathy or discomfort affect the depth of probing in this multilingual focus group?”	Pillow (2015) ; Finlay (2002) ; Ahmed et al. (2025)
Decisions Made	Record methodological choices and the contextual pressures behind them (e.g., access, logistics, ethics)	“Why did I substitute face-to-face interviews with WhatsApp voice notes during electricity outages?” “What rationale justified seeking gatekeeper Standpoint Theor consent before community interviews?”	Nowell et al. (2017) ; Ngozwana (2018) ; Halme et al. (2024)
Evolving Insights	Capture how interpretations shift as cultural understanding deepens and data accumulate	“How did my early assumption about ‘informal’ labour networks change after seeing women’s cooperative structures in Nairobi?” “What new interpretations emerged after translating interviews from Twi to English?”	Alvesson & Sköldberg (2017) ; Berger (2015)

Reflexivity is an ongoing process that evolves as the research unfolds. While recording positionality, emotions, and methodological choices is important, it is equally important to document how a researcher’s interpretations shift over time in response to the data. This dimension, which we call “Evolving Insights,” captures the iterative process of sense-making and highlights how researchers refine their assumptions, reframe their categories, and deepen their understanding as the study progresses. By systematically recording these shifts, researchers enhance transparency and demonstrate intellectual honesty in the interpretive process (see [Berger, 2015](#); [Holmes, 2020](#)).

Triangulation Matrix

Triangulation enhances rigour by comparing data across sources, methods, or investigators. As shown in [Table 4](#), the matrix demonstrates how triangulation strengthens rigour by systematically comparing data across sources (interviews, documents, observations, focus groups, secondary data), methods, and investigators. Examples include multilingual interviews conducted by local bilingual researchers, document analysis to verify policy-practice gaps, and participatory focus groups facilitated by cultural insiders. Each triangulation type—data, investigator, methodological—helps validate findings, reduce bias, and capture nuanced realities in resource-constrained environments ([Carter et al., 2014](#); [Cornwall & Jewkes, 1995](#); [Jonsen & Jehn, 2009](#)).

Member-Checking Protocol

Member checking strengthens credibility by allowing participants to review and confirm the accuracy of interpretations. [Table 5](#) shows a structured process that ensures that feedback is meaningful and traceable. Member checking offers a mechanism for validating interpretations ([Cloonan & Branco, 2025](#); [Enworo, 2023](#); [Romli et al., 2022](#); [Thong et al., 2025](#); [Wu et al., 2025](#))⁶. Rather than a perfunctory transcript review, structured member checking invites participants to critically

⁶ These recently published papers focused on the Global South, providing further guidance on member checking as part of validation strategy.

Table 4. Triangulation Matrix — Global South Contextualisation

Data source	Method	Investigator(s)	Contribution to rigour (in Global South context)	Supporting literature
Interviews	Semi-structured, multilingual (conducted in English + local languages e.g., Swahili, Sinhala, Twi)	Researcher A (local bilingual)	Captured lived experiences of informal-sector workers coping with inconsistent electricity and patriarchal gatekeepers. Enabled culturally nuanced interpretation of idioms and metaphors.	Carter et al. (2014) ; Jonsen and Jehn (2009)
Document Analysis	Policy briefs, NGO reports, and platform regulations	Researcher B (diaspora scholar)	Verified alignment (or contradiction) between official policy rhetoric and on-the-ground participant narratives e.g., regarding safety, pay, or labour protections.	Bowen (2009) ; Farquhar et al. (2020) ; Halme et al. (2024)
Observations	Field visits to marketplaces, cooperatives, or digital-platform hubs	Researcher A & B	Triangulated self-reported behaviour with actual practice—e.g., observed adaptive “low-tech” workarounds to intermittent internet access.	Flick (2018) ; Spradley (2016) ; Ngozwana (2018)
Focus Groups	Community-based participatory sessions facilitated by cultural insiders	Researcher C (community partner)	Surfaced collective viewpoints often muted in hierarchical interview contexts; co-validated emergent themes in local vernaculars.	Cornwall and Jewkes (1995) ; Wallerstein et al. (2017) ; Chigevenga (2022)
Secondary Data	Government reports, local media archives	Researcher D	Provided external validation and macro-level context. For example, provided macro-level context on labour policy or gender norms; enabled cross-case pattern verification across countries.	Guercini (2014) ; Johnston (2014)

engage with emerging themes and clarify or refine their meanings. [McKim \(2023\)](#) outlines a four-step process that begins with transcript sharing and ends with participant confirmation of revisions, thereby positioning participants as co-constructors of meaning rather than passive sources of data. This is particularly valuable in contexts marked by power asymmetries or linguistic barriers, where participant validation of researcher interpretations becomes a crucial marker of rigour.

Coding Reliability Checklist

Coding transparency is key to ensuring dependability in qualitative analysis. The checklist in [Table 6](#) outlines a step-by-step process for achieving coding reliability in qualitative analysis under Global South constraints. Key actions include developing bilingual codebooks with cultural idioms, conducting coder training to address interpretive differences, double-coding subsets offline due to power or internet issues, and resolving discrepancies through culturally sensitive dialogue. Reliability is assessed using measures like Cohen’s κ , with all decisions documented in an audit trail to ensure transparency and dependability ([Campbell et al., 2013](#); [McHugh, 2012](#); [O’Connor & Joffe, 2020](#)). Coding reliability checklists, while often associated with post-positivist paradigms, can also support constructivist or pragmatist researchers by increasing transparency in how data are categorised and interpreted. These checklists typically involve creating a shared codebook, conducting coder training, double-coding a subset of transcripts, and comparing results to ensure consistency ([Campbell et al., 2013](#); [O’Connor & Joffe, 2020](#)).

Table 5. Member-Checking Protocol — Global South Contextualisation

Step	Action	Illustrative example (Global South focus)	Supporting literature
1 – Initial Sharing	Send transcript or translated summary to participant(s) using the most feasible medium (email, WhatsApp voice note, printed copy).	“Due to unreliable internet, I shared a short bilingual voice note summarising key interview points in Swahili and English.”	McKim (2023); Rahmadani (2023); Chen and Boore (2010)
2 – Feedback on Accuracy and Meaning	Invite participants to clarify statements or identify mistranslations, using culturally appropriate communication modes.	“A village leader reviewed the Twi translation and suggested a rephrase for ‘corruption,’ noting its different local connotation.”	Birt et al. (2016);
3 – Refinement and Integration	Adjust codes or themes based on participant input; document rationale for changes.	“After participant feedback, I split the theme ‘community trust’ into ‘religious trust’ and ‘kinship trust’ to reflect distinct cultural logics.”	McKim (2023); Ngozwana (2018); Nowell et al. (2017)
4 – Confirm Revised Interpretation	Return the updated interpretation or summary for final confirmation, acknowledging potential power or literacy asymmetries.	“I read aloud the revised findings in a community meeting for collective confirmation rather than sending written documents.”	Carlson (2010); Cornwall and Jewkes (1995); Wallerstein et al. (2017)
5 – Ethical and Reflexive Closure	Record how member-checking outcomes influenced analysis; reflect on whose voices were amplified or muted.	“I noted in my reflexivity journal that participants hesitated to criticise local authorities, influencing how I contextualised the findings.”	Berger (2015); Holmes (2020); Shulist (2025)

Case-Study Adapted Pitching Research Framework Template

The Case-Study-Adapted Pitching Research Framework (PRF) shown in [Table 7](#) is designed as the integrative capstone of this methodological toolkit.⁷ Whereas the preceding instruments—reflexivity journals, triangulation matrices, member-checking protocols, and coding reliability checklists—each address discrete dimensions of rigour, the PRF unifies them within a single, transparent logic model. Adapted from [Faff’s \(2015, 2024\)](#) original quantitative formulation, this qualitative version reframes the PRF’s eleven elements as *rigour checkpoints* spanning design, data collection, analysis, and reporting.⁸

In the worked example on female ride-hailing drivers, every PRF item (A–K) is linked to tangible methodological actions, from documenting the researcher’s positionality (K) and audit-trail decisions (G) to demonstrating contextual sensitivity through member-validated findings (I–J). The template thus serves simultaneously as a *prospective design compass* and a *retrospective integrity record*, providing early-career researchers with a concise yet comprehensive map of their methodological reasoning. Beyond procedural value, the adapted PRF also embodies the principles of Responsible Science ([Faff, 2021](#))—credibility, relevance, and transparency—by making visible the intellectual architecture underpinning qualitative inquiry in complex Global South contexts [Table 8](#).

Notes for Use

The adapted PRF is a *meta-tool*, as shown in [Table 8](#), that links the preceding four instruments (Reflexivity Journal, Triangulation Matrix, Member Checking, and Coding Reliability Checklist).

It functions as both a planning framework (prospective use) and an evaluation tool (retrospective use).

When completed, the template can serve as:

1. A case protocol summary (e.g., [Yin, 2018](#)) for ethical review or supervisory approval;

⁷ The PRF is a research communication/planning tool comprising 11 essential elements: (A) Working title (WT); (B) Research Question (RQ); (C) Key Papers (KPs); (D) Motivation (MOT); (E) Idea; (F) Data; (G) Tools; (H) What’s New? (WN?); (I) So What? (SW?); (J) Contribution (CONT); and (K) Other Considerations (OCs).

⁸ For further PRF guidance see: (a) [Faff \(2025a\)](#): which maps research pitches across diverse academic fields with discipline-specific tools, worked examples, and training guidance; and (b) [Faff \(2025b\)](#): which shows that pitching research matters across methods, extending the PRF for quantitative, qualitative, and mixed-method approaches.

Table 6. Coding Reliability Checklist — Global South Contextualisation

Step	Action	Illustrative example (Global South focus)	Supporting literature
1 – Codebook Development	Create bilingual or culturally adapted code definitions; include local idioms and translation notes.	“Codes were written in English + Amharic; local proverbs about ‘work dignity’ were logged with explanatory memos to preserve meaning.”	Campbell et al. (2013) ; Chen and Boore (2010)
2 – Coder Training and Calibration	Conduct joint calibration using locally collected transcripts; discuss how culture and power shape interpretation.	“During team training, coders debated whether elders’ ‘silence’ signified respect or disagreement, agreeing to flag contextual cues.”	O’Connor and Joffe (2020) ; Ngozwana (2018) ; Halme et al. (2024)
3 – Double Coding Under Constraint	Independently code a subset of transcripts using offline or paper-based methods where internet is unreliable.	“Each coder used an offline NVivo file; later synchronised during a generator-powered session due to frequent power cuts.”	Campbell et al. (2013) ; McArdle (2022) ; Lunn (2014)
4 – Compare & Resolve Differences	Reconcile coding discrepancies through culturally sensitive dialogue; document reasoning in an audit trail.	“Disagreement over the code ‘obedience’ was resolved after consulting a local advisor on its gendered meaning in Kiswahili.”	O’Connor and Joffe (2020) ; Berger (2015) ; Mazonde and Carmichael (2020)
5 – Assess Reliability & Document Transparency	Calculate intercoder agreement (e.g., Cohen’s κ) and summarise qualitative resolution notes for appendix inclusion.	“ $\kappa = 0.79$ after refining codebook; discrepancies logged with interpretive rationales to demonstrate analytic integrity.”	McHugh (2012) ; Nowell et al. (2017) ; Cole (2024)

2. A training artefact for teaching rigour in case study methodology; and
3. A transparency appendix in published reports to align with Open Science and Responsible Science principles ([Faff, 2021](#), [2025a](#), [2025b](#), [2025c](#)).

Applying a pitching research framework in a Global South context may involve clearly aligning the research problem, context, and methodological choices from the outset. A researcher examining community healthcare access, for example, might define the research question in relation to local infrastructural constraints, justify the selection of a qualitative case study design, and identify appropriate data sources such as interviews, local records, and community observations. Rigour can then be embedded by incorporating strategies such as triangulation, reflexivity, and context-sensitive member checking. This structured “pitching” approach enables coherence between research design, context, and rigour considerations.

Together, these tools function as integrative practices that enhance methodological integrity. Especially for early-career researchers in under-resourced settings, they provide clarity, structure, and defensible procedures that support the production of trustworthy and contextually grounded knowledge. When applied thoughtfully, these tools not only meet external expectations of rigour but also foster internal confidence in the coherence and credibility of the research process. To demonstrate how the five rigour tools interlock in practice, [Appendix A](#) presents a concise case study example set in the Global South, highlighting their sequential and integrative use across the research cycle.

Practical Implications

This guide also provides tangible tools and strategies to support novice and early-career researchers, particularly those operating in resource-constrained or culturally complex environments. For example, the reflexivity journal template is more than a reflective exercise. It equips researchers with a structured way to interrogate their own assumptions, emotional responses, and positionality—elements often overlooked in traditional training but critical for maintaining analytic transparency ([Berger, 2015](#); [Holmes, 2020](#)). Similarly, the triangulation matrix and member-checking protocol transform abstract methodological advice into step-by-step practices that can be systematically documented and defended during thesis reviews or peer evaluations.

For many early-career researchers and postgraduate students, particularly those in Global South institutions with limited mentorship infrastructure, the concept of rigour is experienced as an intimidating, often vaguely defined requirement. This

Table 7. Case-Study-Adapted Pitching Research Framework (PRF) Template

PRF item	Guiding question (qualitative case study adaptation)	Illustrative prompts/Examples	Contribution to rigour
(A) Working Title	What is the focal phenomenon, context, and population being explored?	<i>“Navigating Gendered Risks in Ride-Hailing: A Multi-City Case Study of Female Drivers in Sub-Saharan Africa.”</i>	Clearly articulates phenomenon (gendered risk), context (ride-hailing sector), and setting (Global South cities), anchoring the study’s <i>transferability</i> and <i>analytic focus</i> .
(B) Research Question	What is the central <i>How/Why</i> question guiding the study?	<i>How do female ride-hailing drivers interpret, manage, and mitigate experiences of customer aggression in male-dominated, platform-mediated transport markets?</i>	Defines a <i>bounded yet complex</i> research puzzle aligned with a constructivist or critical-interpretivist stance.
(C) Key Papers	Which 3 scholarly works define the methodological and conceptual frontier for this case?	1. “Rigour vs. Halme et al. (2024) Reality: Contextualizing Qualitative Research in Low-Income Settings.” <i>British Journal of Management</i>, 35(1), 36–51. → Highlights the tension between ideal rigour and contextual constraints in Global South fieldwork. 2. Kwan, H. (2024). <i>The Incomplete Transmutation of Feeling: Female Platform Drivers’ Negotiation and Resistance to Emotional Labour in China’s Ride-Hailing Industry</i>. <i>New Technology, Work and Employment</i>. Advance online publication. https://doi.org/10.1111/ntwe.12318 → offers a rigorous qualitative analysis of female ride-hailing drivers’ emotional labour, directly aligning with this study’s focus on gendered coping in platform work. 3. Berger, R. (2015). “Now I See It, Now I Don’t: Researcher’s Position and Reflexivity in Qualitative Research.” <i>Qualitative Research</i>, 15(2), 219–234. → Foundational guide for reflexivity and positional awareness in interpretive inquiry.	Positions the study in contemporary, <i>topic-relevant</i> literature while demonstrating familiarity with both <i>substantive</i> and <i>methodological</i> frontiers. Enhances confirmability and credibility.
(D) Motivation	What do we know/not know/need to know about this phenomenon — especially in the Global South context?	We know: Gender bias and harassment in gig-work platforms have been documented in North America and Europe. We don’t know: How these risks are perceived and managed in low-regulation, culturally patriarchal African markets. We need to know: What adaptive coping strategies emerge from women’s agency under these conditions, and how such strategies reshape our understanding of safety, identity, and work dignity.	Clarifies the <i>knowledge gap</i> and <i>responsible science</i> imperative — motivating inquiry that is contextually relevant, socially valuable, and empirically feasible.

(continued)

Table 7. (continued)

PRF item	Guiding question (qualitative case study adaptation)	Illustrative prompts/Examples	Contribution to rigour
(E) Idea/Theoretical Lens	What theoretical scaffolding guides interpretation?	Integrates Feminist Standpoint Theory (Harding, 1997) and Role Identity Theory (Burke & Stets, 2022) to frame how gendered agency, identity performance, and safety negotiations intersect in platform work.	Theoretical coherence promotes structured analysis and helps interpret lived experiences as socially and symbolically constructed phenomena.
(F) Data (Context & Cases)	What is the case design and sampling logic?	Multiple-case design across three cities (Lagos, Nairobi, Johannesburg) to capture cross-cultural variation. 30 participants (10 per city) representing different platform models (Uber, Bolt, Little). Sampling = purposive and snowball, targeting women with ≥ 12 months driving experience. Data sources: semi-structured interviews, participant observation, and platform policy documents.	Boundary transparency and replication logic ensure <i>dependability</i> . Triangulation of data types enhances <i>credibility</i> .
(G) Tools (Methodological Instruments)	What data collection and analysis tools are used?	Collection: Semi-structured interviews (average 60 min), observational field notes, document analysis. Analysis: NVivo-assisted thematic coding; bilingual translation checks; inter-coder reliability test ($\kappa = 0.81$). Rigour Tools: Reflexivity journal, triangulation matrix, member-checking protocol, coding reliability checklist, and this PRF template.	Embeds rigour <i>systematically and prospectively</i> —each tool functions as an auditable component within the overall integrity system.
(H) What's New?	What conceptual or methodological innovation emerges?	Introduces “crepuscular coping” — a novel concept describing how female drivers adaptively select “safe-time zones” for work to navigate gendered risk and income trade-offs. Also demonstrates the PRF as a qualitative structuring device for auditability in interpretive research.	Expands theoretical vocabulary and showcases an applied methodological innovation linking PRF logic to qualitative practice.
(I) So What?	Why does this matter theoretically or practically?	Provides <i>gendered, temporal, and contextual</i> insights into platform work, informing policies for safer gig environments. Theoretically, it bridges feminist theory and institutional logic to explain coping under asymmetrical power and risk.	Reinforces societal and scholarly relevance — meeting both <i>responsible science</i> and <i>open science</i> imperatives.

(continued)

Table 7. (continued)

PRF item	Guiding question (qualitative case study adaptation)	Illustrative prompts/Examples	Contribution to rigour
(J) Contribution	What are the three key takeaways?	(1) Extends understanding of <i>gendered resilience</i> in precarious digital labour; (2) Demonstrates methodological transparency through integrated use of PRF-based rigour tools; (3) Provides a replicable “ <i>rigour toolkit</i> ” adaptable to other qualitative case studies in emerging markets.	Consolidates the practical and theoretical contributions while demonstrating traceable rigour.
(K) Other Considerations	What ethical, reflexive, and contextual elements must be documented?	Detailed positionality statement: lead author = West African scholar with insider-outsider perspective. Ethical safeguards: community leader consent, culturally sensitive protocols, and iterative back-translation of quotes. Reflexive memos logged weekly; data encrypted and pseudonymised.	Completes <i>audit trail integrity</i> and satisfies Responsible Science and ethics standards.

guide breaks down rigour into discrete, manageable components, such as conducting inter-coder reliability checks and planning for data redundancy, empowering researchers to approach qualitative inquiry with both confidence and clarity. Furthermore, the emphasis on anticipating contextual challenges, such as power hierarchies, translation issues, and internet outages, serves as an early warning system. It encourages researchers to plan for anticipated obstacles in advance, rather than retroactively address data gaps or inconsistencies. This proactive stance is particularly useful in doctoral research, where disruptions to data-collection timelines can have cascading effects on graduation and funding timelines.

By grounding these practical tools in lived research realities and contemporary methodological literature, this guide serves not only as a pedagogical resource but also as a capacity-building instrument for scholars across the Global South.

Table 8. Integrating Rigour Tools in Global South Research Ecosystems

Cross-Link	Integration example (Global South focus)
Reflexivity Journal ↔ PRF Items (K, D)	Reflexivity entries on <i>insider-outsider positionality</i> and evolving interpretation feed directly into PRF-(K) Other Considerations and PRF-(D) Motivation. Example: a Kenyan-diaspora researcher records tension between “returnee privilege” and community expectations; this reflexive insight later shapes the Motivation statement on ethical access.
Triangulation Matrix ↔ PRF (F, G)	Outputs from multilingual triangulation (interviews + local documents + observations) populate PRF (F) Data and (G) Tools. For instance, a Nigerian study integrates NGO reports, Hausa interviews, and WhatsApp field notes, all logged as auditable sources to strengthen dependability.
Member-Checking Protocol ↔ PRF (I, J)	Participant confirmations—often via community meetings or bilingual summaries—feed into PRF (I) So What and (J) Contribution by evidencing co-constructed meaning. Example: feedback from Indigenous cooperatives refines the practical contribution narrative about participatory governance.
Coding Reliability Checklist ↔ PRF (G, K)	Inter-coder discussions documented in the audit trail support PRF (G) Tools and (K) Other Considerations. Example: local coders explain why literal translations of “corruption” miss cultural nuance; this becomes part of the methodological integrity note in (K).
PRF ↔ Responsible Science and Capacity Building	Completing the PRF and its linked tools creates a portable “transparency package” suitable for ethics boards or funders in Global South universities—demonstrating credibility, relevance, and independence (Faff, 2021). The same integrated artefact doubles as a <i>training scaffold</i> for early-career scholars learning to document rigour under resource constraints.

Concluding Remarks

Ensuring rigour in qualitative case study research is not simply a procedural matter, but an epistemological and ethical commitment embedded throughout the research lifecycle, from design to reporting. This paper argues that, especially in Global South contexts marked by linguistic diversity, infrastructural constraints, and complex power relations, rigour cannot rely on formulaic checklists or the uncritical transfer of Global North standards. Instead, it requires reflexive adaptation, contextual responsiveness, and methodological integrity. By treating triangulation, reflexivity, member checking, audit trails, and peer debriefing as ongoing practices rather than post hoc safeguards, researchers can strengthen the trustworthiness, dependability, and confirmability of their findings. The worked illustration in [Appendix A](#) shows how these tools can operate sequentially and interactively within a PRF-based workflow, even under resource and linguistic constraints. For early-career researchers and postgraduate students, the guide offers practical support and scholarly confidence for navigating complex field settings while producing credible and ethically sound research. More broadly, it positions Global South scholars not merely as users of established methodological standards, but as contributors to richer, more inclusive, and more pluralistic debates about qualitative rigour.

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Appendix

Appendix A. Integrated Application of Rigour Tools in a Global South Case Study

Context and Paradigm

This illustrative case draws on a constructivist–pragmatist study of *female ride-hailing drivers in three African cities (Lagos, Nairobi, Johannesburg)*, pitched in Table 6. The fictional project investigates how women navigate safety, identity, and livelihood in male-dominated digital labour markets. Operating in multilingual, resource-limited, and hierarchically structured environments, the study required continuous reflexive adaptation and transparent documentation of methodological rigour.

1. Reflexivity Journal (Table 2)

From project inception, each researcher maintained a bilingual reflexivity journal capturing positionality, emotional responses, and decision rationales. For example, the local field researcher recorded discomfort during interviews where older male gatekeepers controlled access, prompting revisions to the interview protocol. Weekly journal reflections were later coded to track evolving interpretations, ensuring that insider–outsider dynamics were visible in both analysis and reporting.

2. Triangulation Matrix (Table 3)

Data were triangulated across interviews, platform policy documents, field observations, and local media reports. Comparing self-reported experiences of harassment with company safety policies revealed systematic contradictions that became key analytical insights. Investigator triangulation was achieved by pairing a local bilingual researcher with a diaspora co-author who independently reviewed coded excerpts, reducing interpretive bias.

3. Member-Checking Protocol (Table 4)

Given unreliable internet connectivity and varying literacy levels, member checking relied on short WhatsApp voice notes summarising findings in English and Swahili. Participants’ feedback refined the interpretation of “safety zones,” clarifying that night-time avoidance was driven as much by social stigma as by physical risk. Collective validation meetings with small driver groups ensured shared ownership of meaning.

4. Coding Reliability Checklist (Table 5)

A bilingual codebook was developed, integrating local idioms such as *ujasiri* (courage) to retain cultural nuance. Two coders double-coded 20 percent of transcripts offline and synchronised files during scheduled power availability.

Discrepancies were resolved through discussion, achieving $\kappa = 0.80$. All coding decisions and rationale were logged in an audit trail to reinforce dependability.

5. PRF Integration (Table 6)

The adapted PRF served as the overarching integrity map. Each PRF item (A–K) was populated using outputs from the four tools—e.g., reflexivity entries informed (K) Other Considerations, triangulation outputs fed into (F–G) Data/Tools, and member-checking notes substantiated (I–J) So What/Contribution. The completed PRF doubled as a transparency appendix suitable for open-science archiving.

Lessons and Transferability

This integrated workflow demonstrates how methodological rigour can be both *systematic and context-responsive*. By embedding reflexivity, triangulation, member validation, and coding reliability within the PRF architecture, early-career researchers in the Global South can operationalise credibility and transparency without heavy infrastructure. The model is easily transferable to other domains—such as health, education, or entrepreneurship—where responsible, resource-aware qualitative inquiry is vital.