Introduction

Rethinking Methods of Investigation and International Organizations

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Scholars have studied international organizations (IOs) in many disciplines generating important theoretical developments. Yet a proper assessment and broad discussion of the methods used to research these organizations are lacking. Which methods are being used and in what ways? Do we need a specific methodology applied to the case of IOs? What are the concrete methodological challenges when doing research on IOs? This book compiles an inventory of the methods developed in the study of IOs under the five headings of *Observing*, *Interviewing*, *Documenting*, *Measuring*, and *Combining*. We do not aim to reconcile diverging views on the purpose and meaning of IO scholarship but to create a space for scholars and students embedded in different academic traditions to reflect on methodological choices and the way they impact knowledge production on IOs.

Why This Book?

Methods of investigation are ubiquitously discussed in today's social sciences. In addition to the many handbooks available on specific methods (i.e., interviews, survey research, discourse analysis, etc.), more systematic methodological discussions have recently emerged in international studies (see for instance Aradau and Huysmans 2014; Devin 2018; Klotz and Prakash 2008; Schmidt-Wellenburg and Bernhard 2020; Huddleston et al. 2022; Lamont 2022). However, the field of IO studies has yet to thoroughly explore these avenues.

So far scholars researching IOs have had access to two types of publications. On the one hand, they can get ahold of several handbooks on IOs (see for instance Barkin 2013; Devin 2022; Hurd 2020; Karns, Mingst, and Stiles 2015; Reinalda 2013; Rittberger et al. 2019; Weiss and Wilkinson 2018), in which methodological questions are often not put to the fore. On the other hand, they can learn about a set of methods in manuscripts dedicated to specific approaches to studying IOs (see for instance Müller 2013; Niezen and Sapignoli 2017 for an anthropological approach).

This book does not intend to replace these volumes but rather supplements them by gathering a wide variety of methods with a specific focus on their applications in IO research. By bringing together junior and senior scholars from different disciplines (political science, international relations, anthropology, sociology, history, law, etc.) and academic communities in Europe, North America, Asia, and Oceania, our aim is to reflect upon the diversity and richness of the research on IOs conducted in the social sciences and humanities.

Whether drawn by a specific research question or a general interest in IOs, the book will help both students and researchers in kick-starting and pursuing a research project on such institutions. The book may be read as an introduction to the complex world of IOs presented in a condensed and accessible format. In doing so, it provides an overview of what has been carried out so far and constitutes a broad inventory of both well-established and more recent methods used in the social sciences. All contributions review a specific method (or combination of methods) in few pages, pointing out the advantages and limits as well as providing concrete tips.

As a daily companion for academics and students alike, the book is a practical guide that can be used throughout the research process, from the definition of the question to data collection and generation, as well as during the analysis and writing phases. For bachelor students, the book proposes a first dip into the wide sea of IO scholarship by providing a strong basis to develop their methodological awareness. For graduate and doctoral students, it offers an overview of the various methods available to kick-start their own research on IOs and gives practical cues for the development of their projects. For IO scholars, the book encourages them to expand the pool of methods they use to pursue relevant and innovative research on IOs.

International Organizations as Research Objects

Instated in a founding act (treaty, charter, legal status) and embodied in a material framework (headquarters, funding, and staff) (Smouts 1995), IOs constitute a coordination mechanism between members bringing "stability, durability and cohesiveness" in international relations (Duverger quoted in Archer 2014: 2). However, IOs are not solely a group of member states; they are inextricably tied to both their bureaucracies and the various (non-state) actors revolving around them (Weiss and Thakur 2009). IOs are also made up of a diversified network of individuals—from executive heads to staff members, as well as experts, diplomats, and civil society activists—constituting complex systems of interaction where multilateralism takes multiple forms beyond formal and institutional boundaries. We therefore do not essentialize IOs in this book but question them as actors, fora, and resources (Hurd 2020) that participate and set the stage for both intergovernmental and transnational cooperation. Such a broad definition helps embrace the complexity of IOs as research objects and encompasses the diversity of IO studies.

Existing typologies in the literature highlight multiple types of IOs by distinguishing intergovernmental from nongovernmental and hybrid organizations, with a growing interest in informal IOs (Roger 2020) and public-private partnerships (Andonova 2017). For instance, scholars have classified IOs based on membership (universal or restricted), competence or scope (general purpose or issue-specific), function (program or operational organization), authority (strongly or loosely binding, strong or weak in implementation), delegation (intergovernmental or supranational), and centralization (decentralized or centralized organization) (Rittberger and Zangl 2006: 10–12; Rittberger et al. 2019: 5–7). Although this introductory chapter does not adopt one particular typology to classify the IOs mentioned in the book, such typologies are nonetheless useful to define and delimit one's research project. They draw attention to specific characteristics helpful for case selection, comparison, contextualizing research findings, and discussing potential generalization.

The contributions to this book approach these diverse characteristics as methodological challenges rather than formal lines fixing the boundaries of IO studies. Indeed, they are not designed in a "one size fits all" approach: they acknowledge when a method is better suited for a specific type of IO *and* identify the challenges of its application in different multilateral contexts (formal/informal, governmental/non-governmental, etc.), addressing the issue of comparability between IOs. Likewise empirical illustrations build on fieldwork undertaken in all regions of the world and explore IOs with either universal or regional membership and with either thematic or more encompassing mandate(s). Not only does the book address this empirical diversity, it also values the different disciplinary perspectives. The contributions inform about the methods appropriate to answer a large variety of research questions including on the nature of IOs, the reasons behind their creation, their functioning and their role in world politics to name a few.

Methods as a Deliberate and Reflexive Stance in the Research Process

Scholars have access to a breadth of methodological tools to research IOs and have relied on different approaches when it comes to methodology. Indeed, methodology concerns the logical structure and procedure in scientific inquiry (Sartori 1970: 1033). Put differently, it relates to "the intellectual process guiding self-conscious reflections on epistemological assumptions, ontological perspective, ethical responsibilities, and method choices" (Ackerly, Stern, and True 2006: 6). IO scholarship accommodates a large variety of views on these reflections. This book focuses more precisely on method choices while raising issues regarding their integration in various methodologies.

In this vein we define methods as both technical and performative tools: they help collect, generate, and analyze data; they also construct particular accounts of the social world (Ackerly, Stern, and True 2006; Law and Urry 2004). In doing so, we approach methodological choices as constitutive of a reflexive research process: they have important consequences for the production and dissemination of knowledge. Drawing from Bellamy, Williams, and Griffin, who invited peacekeeping scholars to "be theoretically self-conscious and ask basic questions about what [they] are looking at and why, and what is excluded when [they] look at something in a particular way" (2010: 20), we enjoin researchers to be *methodologically* self-conscious. Whatever our ontological and epistemological traditions, one should consciously reflect on the methods one chooses and how one uses them to produce knowledge on the world and be aware as to what these methods allow to grasp or lead to ignore.

This reflexive stance ought to be adopted throughout the research process. On the one hand, by reflecting on how one's academic training and background influences the methods one selects, one can deconstruct the prejudices one may have on specific methods or methodologies. On the other hand, situating methods in their historical and disciplinary contexts helps reconsider the opportunities and challenges of their application in IO studies.

In this book, our focus on methods is therefore embedded in a broader thinking on the (various) goals of scholarship (making generalizations, understanding particular cases, etc.) and on the consequences of using particular methods for knowledge production (Bourrier 2017).

IO Research Methods?

While acknowledging ontological and epistemological divergences on the role of IOs in international relations, the book calls for theoretical and methodological dialogue. To the question "are IOs a specific research object when it comes to methods?" the book reveals that IOs are both *banal* research objects in the social sciences and *peculiar* settings in which to conduct research. Overall, each method calls for a certain degree of specification to suit the context, adapt to the research object, and follow the researchers' increasing familiarity with their object. Hence if there are no such "IO research methods," the contributions to this book show *fluctuating degrees of methodological adjustment*. While all trace the broader use of a specific method in the social sciences and humanities, some insist on a necessary adaptation not only to apply one method to IOs but to benefit the most from its advantages in the context of a research project on IOs.

Researchers may have to adapt their methods to the specificities of the IO context, considering two intermingled dimensions: the way they approach IO research *and* the characteristics of the IO(s) under study. First, the book demonstrates that the methods researchers use—and the required adjustments—depend on their own definition and conception of IOs often in line with their academic background and the paradigms they subscribe to. For some, states are seen as the main actors in an intergovernmental perspective. They therefore question power politics within IOs and, in turn, the influence of IOs on governments. Methods used to analyze states' voting patterns, for example, inspired by the study of domestic politics and foreign diplomacy, must be reevaluated in light of the shift from national to international considerations (see part 4—*Measuring*). For others, IOs are conceived as a collection of individuals, professions, and practices. This perspective entails opening the box and using methods that unravel internal processes at play, not only those of government representatives. When doing so, the contributions hereafter emphasize the need to adjust methods to the specificities of the internal structures of IOs and to the characteristics of IO staff (see part 1—*Observing* and part 2—*Interviewing*).

Second, methodological adaptations relate to the wide diversity of organizations under scrutiny in IO studies. Three common specificities of IOs should be considered when fine-tuning methods to a research object: (i) IOs encompass a large variety of actors, (ii) they are multilevel organizations, and (iii) they are embedded in a complex political environment. Methodological adaptations result from a detailed assessment of the ways these characteristics may affect the research question and expected results. Concretely, this means that a researcher must map out the different actors involved in order to identify the most relevant types of interviews, the language(s) to use, and the power dynamics that will impact data generation (see part 1—*Observing* and part 2—*Interviewing*). It implies considering the institutional features of the IO(s) one intends to scrutinize in order (i) to adjust methods to its degree of formality, (ii) to adapt methods of data generation and analysis to the most fruitful IO artifacts and productions (see part 3—*Documenting*), and (iii) to find the right combination of methods (see part 5—*Combining*). If these adaptations might be marginal like in the case of computerized text analysis or prosopography (see part 2—*Interviewing* and part 4—*Measuring*), in other instances, such as participant observation or voting analysis (see part 1—*Observing* and part 4—*Measuring*), IO specific characteristics are critical features to consider to best use these methods since IO membership, multilevel action, and bureaucratic mechanisms require particular methodological adjustments. In other words, the book invites the reader to reflect on the spatial, temporal, and institutional context(s) in which research on IOs is conducted and its related methodological implications (Maertens et al. 2021).

Overall the empirical material emanating from IO research should become a solid basis from which we critically approach the data we collect and use. Data one generates is both contingent and revealing of (i) the varying types of access one is granted and (ii) the different ways IOs are willing to share but also produce and disseminate their knowledge and information. In this vein, contributors to this book point to concrete cues to be mindful of the manufactured nature of data. For instance, while statistical data is widely employed in the social sciences, when using IO statistics, one should be aware of the issues of standardization required for the sake of comparability between states (see part 4—*Measuring*). Likewise the documents an IO provides depict what is *made available* and *visible* (see part 3—*Documenting* and part 5—*Combining*). Power relations experienced when doing fieldwork may shape the generated data, while informing on the power dynamics instilled in IOs (see part 1—*Observing* and part 2—*Interviewing*). A critical stance on data is therefore indispensable for each step of the research process and for every type of method we use. Taking stock of the *visible* thus needs to come hand in hand with a thought process around the *invisible*. Paying serious attention to data generated by researchers, or provided by the IO itself, allows for a finer grained understanding of IOs.

Seventy-Five Years of IO Studies: A Methodological Lens

To what extent have scholars discussed research methods in their studies of IOs? How do they present their methodology? Can we observe an evolution over the past seventy-five years? To answer these questions, we conducted a longitudinal study in which we analyzed a corpus of research articles on IOs from 1945, the year of the creation of the United Nations, to 2020.[1] The corpus is based on articles drawn from the seven most used and referenced peer-reviewed journals according to the contributors to this book. Since 1950 and following a five-year mark, we retrieved the articles addressing IOs and/or multilateralism in either the title or the abstract (see table 1 below).

The systematic selection led to a total of 455 articles. Figure 1 displays the number of publications in our sample over time while table 2 shows that the increased number of retrieved articles since the 1990s also results from the inclusion of new journals in our sample.

We analyzed our sample along three axes: (i) we looked at whether authors use first- and/or second-hand empirical data or if the article is mainly conceptual; (ii) we assessed whether authors discuss the methods used to collect, generate, and analyze their empirical data by coding the presence/absence of explicit methodological reflection in each article relying on the mention of "data," "methods," and/or "methodology"; (iii) we checked whether the articles have a section/subsection dedicated to the presentation and explanation of the methodology and methods employed. The findings point to general trends throughout the entire period and show significant evolutions over time.

Table 1. Methods in IO Studies: Surveyed Journals

Journal (year of creation)	Number of articles on IOs	Proportion in sample
International Organization (1947)	151	33,19
International Studies Quarterly (1959)	59	12,97
European Journal of International Relations (1995)	44	9,67
Global Governance (1995)	106	23,29
Critique internationale (1998)	22	4,84
Review of International Organizations (2006)	44	9,67
Global Policy (2010)	29	6,37
TOTAL	455	100

1. Similar endeavors were last carried out in the 1970s, see Alger (1970) and Dixon (1977).

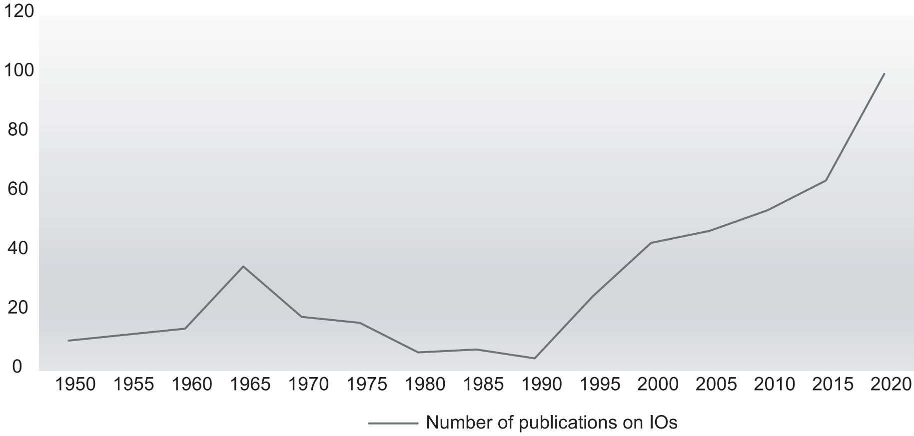

Figure 1. Number of publications on international organizations per year

Table 2. Methods in IO Studies: Sample Overview per Year

	Number of journals sampled	Number of articles on IOs
1950	1	10
1955	1	12
1960	2	14
1965	2	35
1970	2	18
1975	2	16
1980	2	6
1985	2	7
1990	2	4
1995	4	25
2000	5	43
2005	5	47
2010	7	54
2015	7	64
2020	7	100

First, we found that the large majority of publications on IOs, since 1945, relies on empirical data for their demonstration, with 84 percent of articles using first- and/or second-hand data. Our results then show that while most articles using empirical data propose a methodological reflection (almost 70 per cent), 30 percent of them contain a section or subsection dedicated to the methodology and/or methods the authors employed to conduct their research.

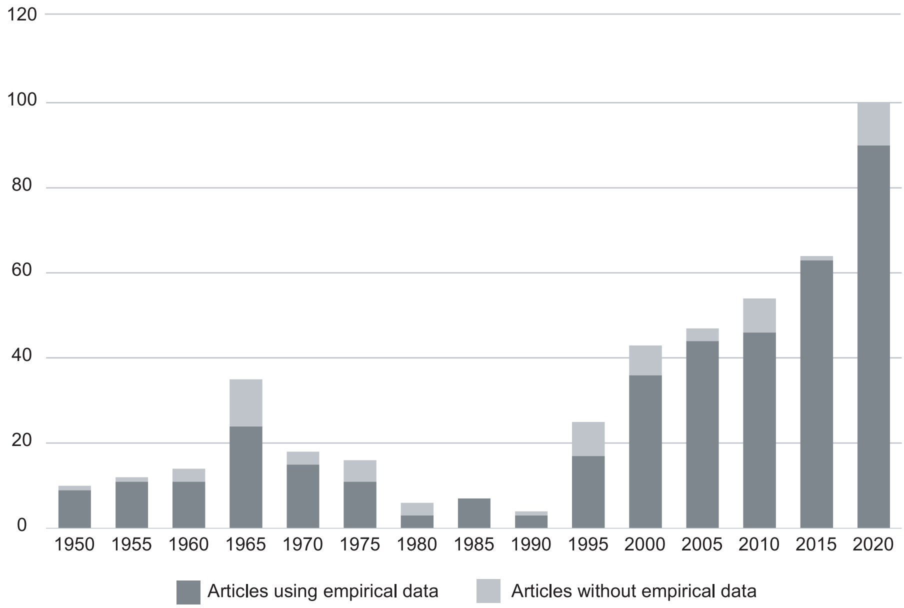

Figure 2. Use of data in articles on international organizations over time

Based on these three dimensions, the analysis also shows interesting evolutions over time. First in terms of the use of empirical data, over the entire period we notice that scholars have predominantly relied on empirical data in their study of IOs, as summarized in figure 2. In terms of methodological reflection and section, we observe that scholars have discussed research methods since the beginning of IO studies. However, we see a constant increase in this endeavor since 1995. Figure 3 presents the share of articles with methodological reflection and section over time. In particular, it shows that the increased methodological reflection is accompanied by a formalization in publications. Whereas articles published before 1995 barely have a dedicated methodological section, from this date on, the share of articles including such a section has more than doubled. In our view, this trend could reflect an increased formalization in the way research on IOs is conducted along with shifts in publication requirements.

In sum, we observe an increasing interest in presenting the methods used to produce knowledge on IOs. Our sample shows that explicit mentions of research methods are central to publications on IOs today. However, more is yet to be said and researched on whether dedicated sections actually suggest greater critical stances on authors' methodological practices. This book is

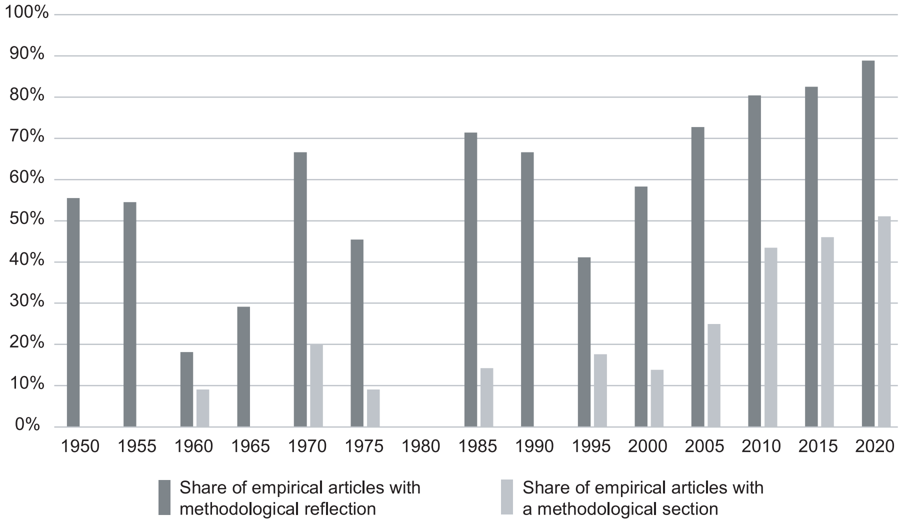

Figure 3. Evolution of the share of articles with methodological reflection and section

designed as a contribution to deepen methodological discussions and ongoing developments in the field of IO studies.

How to Read This Book?

The book comprises three types of contributions in each of the five parts entitled *Observing*, *Interviewing*, *Documenting*, *Measuring*, and *Combining*. Chapters present one method (or set of methods) and its application in IO studies. Boxes highlight more specific methodological tools and tricks. Interludes shed light on controversial or cross-method issues at the end of each section as a way to discuss the current debates around a type of method or "family" of methods. They typically build on the section's contributions and propose a more conceptual and abstract stance on the section's theme. While the book can be read in chronological order, its various contributions also have the merit to be read as standalone, valuable inputs.

How should researchers read this book? Methodological choices depend first and foremost on the research question to be answered. The book constitutes a roadmap to help navigate between different methodological options and select the most appropriate methods depending on the phenomenon one intends to research. Each chapter highlights the type of research questions one method allows to investigate and the results one may expect to find by using that particular method. By providing a short description and concrete examples of a method's application in IO research, the chapters identify *what* the method entails, *why* it is relevant to study IOs, *how* one can apply that method to collect and analyze data, and *what challenges* one may face in applying that method. The chapters combine concrete examples based on the contributors' own research experience as well as illustrations found in the literature. The contributions also include a selection of additional readings to continue the exploration of each method.

While researchers may be leaning toward specific methods (for whatever reasons), the book helps validate the a priori choices related to those methods and suggests other (complementary) methodological avenues to answer the research question. Practically speaking, you may open the book to be introduced to a method you already know and may want to use, but you will also find key inputs and references to start a reflection on what else is possible since the book offers an introduction to a wide variety of methods used to research IOs. Other options may thus appear as more relevant to reach your research objectives (especially since research questions and methodologies go hand in hand). By touching on epistemological debates, this book can also help (re)formulate a relevant, feasible, and fertile research question.

To facilitate the navigation among the numerous methodological options IO scholars have at hand, the book is structured in five main parts that group a series of methods around similar methodological traditions and types of empirical material. The first one, *Observing*, includes methods relying on observation and addresses common challenges around access and confidentiality. The second part, *Interviewing*, gathers techniques to collect data through individuals with a specific emphasis on the useful adaptation for the specificities of the varying types of individuals involved with IOs. The third part, entitled *Documenting*, presents methods used to research IO productions, from their collection to their analysis. The fourth part, *Measuring*, addresses methods relying on quantitative data and the challenges to gather relevant, reliable, and comparable data. Finally, the last part, *Combining*, provides examples of studies in which two or more methods are jointly used and the advantages that result from such a combination to study IOs.

Interludes conclude each part by reflecting on the use of these methods in IO studies. They emphasize the debates and potential controversies around the selection of methods, their (not always necessary) adaptation to the field of IO research, and their constantly evolving uses. They show what borrowing and adapting methods from different academic fields can do to IO studies, as much as how the field of IO research revives and updates methodological tools in the social sciences and humanities. Overall, the book sheds light on the variety and vividness of research on IOs, in terms of topics, methodologies, and academic traditions, and advocates for methodological openness and diversity to foster innovations in IO studies.

Limits and Avenues

The book intends to start an in-depth and inclusive conversation about methods in IO studies. Yet our suggested format with its condensed contributions and entry through methods has its quirks. For instance, structuring another book around diverging IO characteristics and different types of actors could bring additional insights to the methodological considerations raised in this one. While we have worked toward an inclusive book, integrating both a gender and a senior/junior balance, we must also acknowledge the underrepresentation of scholars from the Global South.

Despite our effort to address a wide range of methods and methodologies embedded in various epistemologies and theoretical stances, the book does not cover it all. There undoubtedly remain gaps and silences. We identify four main topics that the book does not touch upon sufficiently, mostly because of ongoing developments. Firstly methods revolving around the increased use of digital devices must receive greater attention in the future. We recognize the impact of social media, like Twitter, and the use of online platforms for research, but have not given an exhaustive account of the ways in which social media and Internet-based research can be fully beneficial to carry out politically salient and academically timely research on IOs. These platforms may inform about the ways IOs communicate, disseminate knowledge, and in turn interact with their so-called beneficiaries as well as with individuals around the world (see for instance Bjola and Zaiotti 2020). Analyzing how IO actors use different types of software, applications, and digital platforms could point toward new practices of coordination, cooperation, and collaboration.

Secondly and partially connected to the first point, the book opens the discussion on issues of research "at a distance," which deserves further attention in upcoming investigations (Bourrier and Kimber 2022). In particular, researchers may be put at a distance deliberately by IO actors or as a result of specific circumstances. This became ever more relevant in the wake of the COVID-19 pandemic that propelled most scholars to think of their fieldwork differently. The impact of the pandemic on both multilateralism and academia under "home office" poses new challenges and questions

(Maertens et al. 2021), calling for methodological innovations (on online research methods see for instance Fielding, Raymond, and Grant 2008).

Thirdly the book does not discuss behavioral methods, i.e., methods to empirically study "preferences, beliefs and decision-making" (Hafner-Burton et al. 2017: S2) that affect the choices of IO actors. They include various types of experimental methods such as survey-based and field experiments (for a review see Mintz, Yang, and McDermott 2011). These emerging methods may be useful to test causal relations and provide new hypotheses in IO research.

Fourthly the book only partially tackles the legal and ethical issues associated with doing research on IOs. We see four avenues for future discussions to take stock of old and new dilemmas in that matter. First, the generation and use of data on individuals revolving in and around IOs raise important ethical questions about the protection of personal data. While this is not new, the use of commercial clouds as storage systems and the commitment to open science bring additional elements to consider. Second, scholars are also increasingly exploiting online content to explore various dimensions of IO action; such use requires ethical consideration, especially when it comes to content made available online by individuals. Third, the legal and institutional obstacles to conduct research on and in IOs can be daunting. IO researchers should reflect on what the judicialization of science and access to public administrations is doing to IO studies and how to continue creating relevant knowledge on multilateralism regardless. Finally, the high connection between IOs and academia on the one hand, and the growing public attention given to research on the other invite us to think more critically about the normative effects of IO studies.

The book nonetheless introduces a timely discussion over the methods used to investigate IOs. We see it as a living document, which needs to be updated regularly. In this way we aim to inspire and encourage researchers to continue applying new methods and innovate methodologically, as there is a need to respond to ever-growing and ever-varying research questions raised by the constant evolution of IOs.

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