

Virtual Ethnography and learning spaces: researching a community of practice (working paper)

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Introduction

Despite the penetration of the internet into our daily lives there are few texts which explicitly combine the Internet and ethnography. The purpose of this paper is to explore the use of virtual ethnography alongside offline methods of observation and interviews to explain the concept of learning spaces within a community of practice of owner managers of small businesses. It will contribute to our understanding of virtual ethnography in management research, in particular the growing area of knowledge exchange within Higher Education. This paper will be of interest to a broad audience including those who have an interest in virtual ethnography, learning communities, networked learning, organizations and knowledge exchange.

The paper will begin with an outline of the community of practice being researched, the LEAD programme, a leadership programme for owner managers of small businesses. The methodology will be described with detail on the use of virtual ethnography. The concept of learning spaces across the LEAD programme is one of the key findings that will be explored followed by a discussion on what virtual ethnography brings to the study.

Background on the LEAD Programme

The unit of analysis is a leadership programme and the SME owner managers enrolled on it. Leading Enterprise and Development (LEAD) is a programme run by the Institute for Entrepreneurship and Enterprise Development (IEED) at Lancaster University. LEAD aims to contribute to raising regional productivity, competitiveness and skills by addressing issues of leadership within the context of the SME sector generally and in particular in the owner-manager's business. LEAD is delivered over a ten month period in cohorts of up to 25 owner-managers of SMEs throughout the northwest of England. The programme adopts an integrated learning approach to develop both the owner-manager and the business through masterclasses, coaching, mentoring, action learning, business shadowing and business exchanges. An online discussion space supports communication and peer-to-peer interaction between everyone

involved in LEAD (delegates and facilitators) when not physically together.¹ Each element of LEAD was designed to meet the needs of SME owner managers as learners and the programme has changed in response to an ongoing dialogue with the delegates. In brief the following key learning processes are central to the design of LEAD:

- Taught (formal) learning – to heighten the salience of leadership to stimulate greater identification with the social role as leader
- Observational learning – to provide opportunities for owner managers to observe a number of leadership styles
- Enacted learning – to refine the observed learning in action
- Situated learning – to ensure the enactment is context relevant and not artificial (ensuring relevance and applicability)

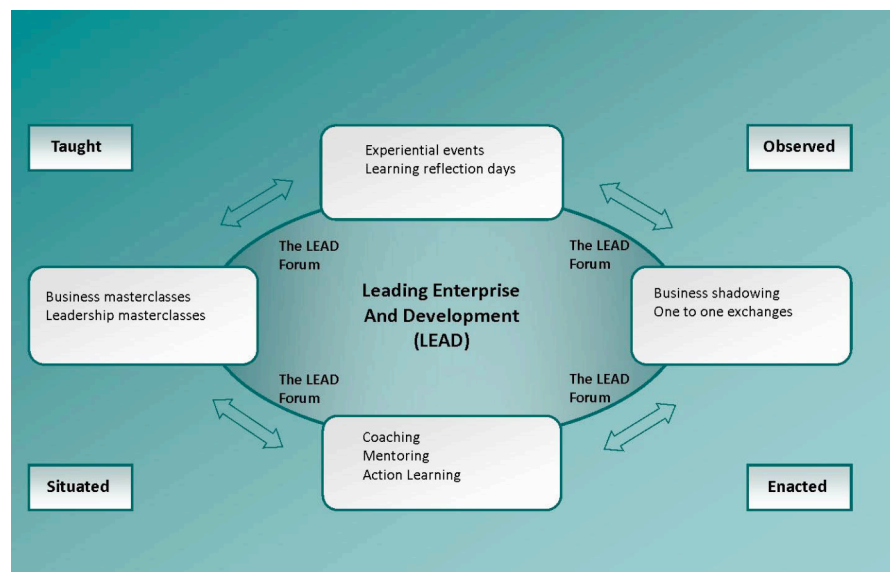


Figure 1: Th

Conceptualizing LEAD as a community of practice

“It’s so much more than a programme...it’s like a community” (LEAD delegate, cohort 2)

SMEs are part of many networks. These may be formal such as Chambers of Commerce, membership to a professional body, business networking events, or informal such as friends, family and other businesses. The link between entrepreneurship and networks is not new (see for example, Johannison, 2000; Araujo and Easton, 1996) and to some extent SMEs may be seen to be part of what Brown and Duguid term, ‘networks of practice’. A network of practice refers to the overall set of various types of informal, emergent social networks that facilitate learning and

¹ There have been a number of platforms used for the online forum but the purpose of this virtual learning environment has consistently been to provide a shared, confidential space for the LEAD delegates. It was initially used for posting course information and organising social events but the delegates also used it to discuss the content of masterclasses, to ask one another for business help and to continue their action learning set discussions online in a confidential space. In Community of Practice terms it may be seen as community maintenance.

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knowledge sharing between individuals conducting practice-related tasks (Brown and Duguid, 2000a). A network of practice differs from a Community of Practice in that relations among network members are significantly looser in a network of practice (Brown and Duguid, 2002:205). Communities of Practice are relatively tight-knit groups of people who know each other constituting a localized and specialized subset of networks of practice. LEAD is conceptualized as a Community of Practice comprised of owner managers of SMEs and includes the LEAD team at Lancaster University. LEAD differs from a network of practice in that the members meet regularly over time and continually negotiate with, communicate with and coordinate with each other in the course of work (Brown and Duguid, 2000b). The course of work in this context is the owner managers' own leadership and business development. LEAD was constructed purposefully as a learning community involving multiple organizations. It is recognized that bringing any network into being involves developing structures, routines and rituals that create mutual engagement and keeps the joint enterprise in view (Briner and Hodgson, 2003). A Community of Practice involves organizing around some particular area of knowledge that gives members a sense of joint enterprise and identity (Lave and Wenger, 1991). The joint enterprise on LEAD is the same as the course of work, the business and leadership development of the delegates. However, it is the practice-based learning that enables them to apply it to their respective companies. Each of the seven cohorts of LEAD cohort is considered here to be a Community of Practice of its own. As a learning community, each cohort displayed similar characteristics and behaviours. The frequent interaction between the delegates over the ten month period ensured that the delegates on each cohort knew one another very well and had a sense of joint enterprise and identity. The community of mutual engagement, a negotiated enterprise and a repertoire of negotiable resources accumulated over time as set out by Wenger (1998) were all substantially present for each cohort. Along with the shared repertoire across the physical interactions on LEAD the online LEAD forum was an important part of the community building likened to glue by the delegates, keeping everyone together.

Conceptualising LEAD as a Community of Practice can help to provide a systematic understanding of how this Community of Practice operates and the dynamics leading to learning for SMEs. It has also helped to refine the methodology from an interview based study to include ethnography on and offline.

Methodology

This study is part of a larger research project exploring small to medium sized enterprise (SME) peer-to-peer learning. It is an interpretive study that draws on empirical qualitative research gathered over a period of four years. Initially the research sought to find out how SMEs socially

constructed the LEAD forum. A first attempt at exploring how SMEs on LEAD used the LEAD forum involved qualitative interviews with five delegates across cohorts 1-4. These interviews were undertaken in an exploratory manner, with a view to refining the research questions alongside exploring an appropriate methodology. Findings from this research showed the technology to be largely missing from their narratives, it was invisible because it was working (for a discussion on the invisibility of working technologies see Law, 1992). This work also highlighted the limitations of data collection when the focus was directly on the technology. The research focus shifted to finding out how SMEs within this Community of Practice learn and, subsequently, how the LEAD forum contributes to this.

A further nine interviews were conducted with delegates on cohort 5 refocusing the topic on their learning and communication between the LEAD delegates. These interviews showed that the LEAD forum was a key feature in their LEAD experience in bringing the cohort together when they weren't physically in one place. As one delegate put it, *"it keeps everyone together, it is a glue."* Ironically, not focusing on the technology during the interviews enabled the delegates to talk about their experience of the technology and its relationship to their view of the cohort and their own learning on LEAD. However, these interviews were only a small part of the social construction of the LEAD forum. The findings from both sets of interviews were more methodological than theoretical: interviews alone were not going to provide a sufficient understanding of how this technology is used and how it contributes to SME peer learning. A series of observations were carried out in the workplace of four of the nine SMEs interviewed on cohort 5 to get an understanding of their 'lives' outside of LEAD and to see how technology in general was used by these delegates.

The experience of these interviews and participant observations provided practical experience of field work and helped to reveal issues that influenced the current research focus. Although the interviews and observations provided interesting data it was felt that an ethnography of the next cohort, cohort 7, would provide a deeper understanding of learning taking place between the SMEs. In addition to a 'traditional' ethnography including observations and interviews, it was decided that a virtual ethnography would be conducted online on the LEAD forum. Most of the of the learning spaces on LEAD are open to the whole cohort and these spaces are replicated on the LEAD forum (see figure 2). Others are private and confidential between subsets of the cohort and therefore are not open to me as the Director of the programme. One of these spaces are the action learning sets. I gained permission to observe on the action learning sets throughout their monthly set meetings and their online discussions between meetings. This allowed me to access the online discussions around this space also.

Overview of research			
Five qualitative	Nine qualitative	Participant	Ethnography and

interviews with LEAD delegates (cohorts 1- 4) focusing on the technology (the LEAD forum).	interviews with LEAD delegates (cohort 5) focusing on their LEAD experience.	observation and further interviews with four cohort 5 delegates.	Virtual Ethnography of cohort 7. Participant observation of one action learning set.
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Table 1: Overview of research

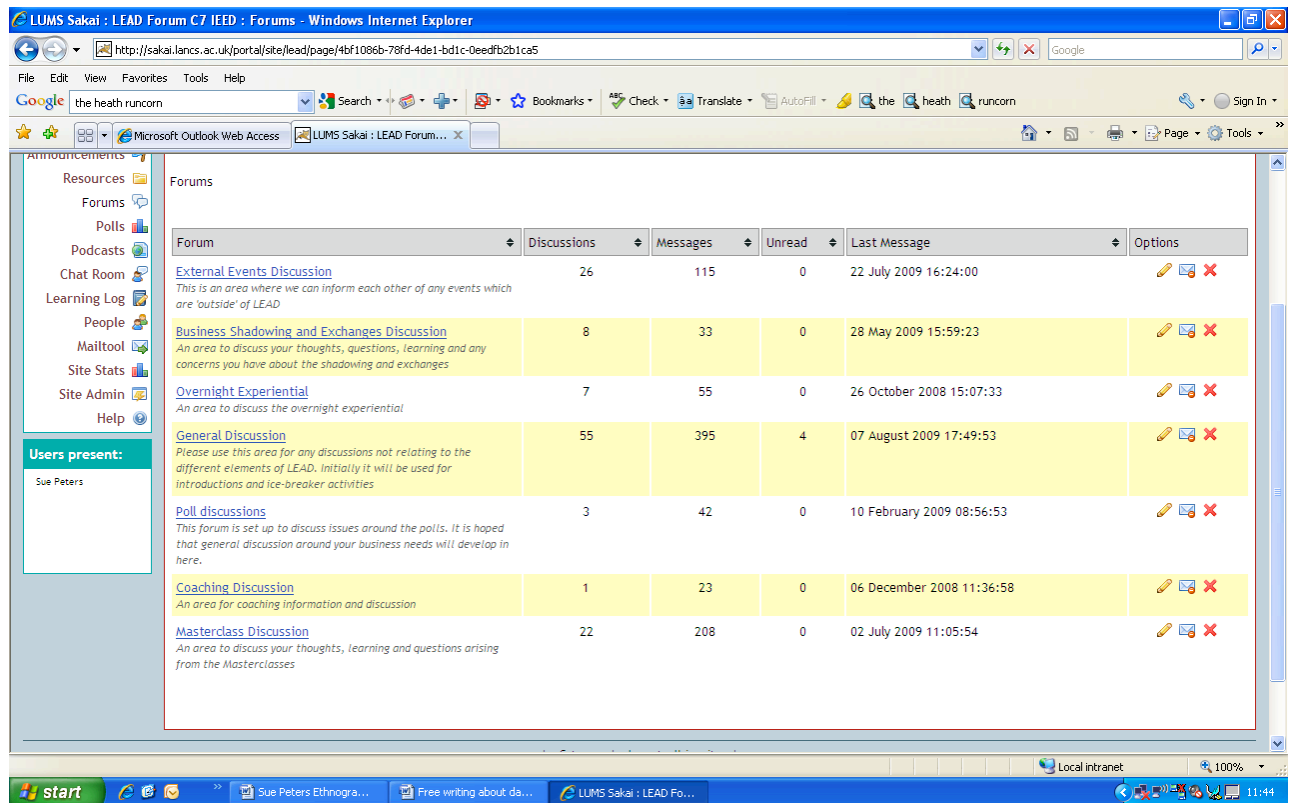


Figure 2: The LEAD forum

To summarise; the ethnography is informed and complemented by the data already collected from the qualitative interviews and participant observations. Alongside participant observation and interviews a yearlong virtual ethnography has been conducted on the LEAD forum in order to both understand the online forum as a learning space within the LEAD programme and the influence of this space on the community of practice (and vice versa).

Ethnography & Virtual Ethnography

There are few texts which explicitly combine the Internet and ethnography. One such text (and may be considered somewhat dated in terms of the speed at which Internet use is growing) is Hine's (2000) "Virtual Ethnography". Hine proposes that use and understanding of technology, in

particular the internet, are central if we are to understand the technology as an agent of change. She suggests that ethnography is an ideal methodological starting point for such a study: “Ethnography can therefore be used to develop an enriched sense of the meanings of the technology and the cultures which enable it and are enabled by it” (2000, p. 8).

Ethnographies are typically carried out in a physical space, a tendency which is exacerbated by the historical roots of anthropology in the study of relatively isolated communities (Hine, 2000). Certainly there is a tendency to treat the field site as a physical place where one goes. Writers talk about immersion in a site (Merriam 2002) and the importance of face-to-face presence in events and interactions (Van Maanen 1988). Hine (2000) proposes that it could be useful to treat the Internet as a separate cultural sphere in order to understand how it is articulated into, and transforms offline relationships (p.59). She continues “This would enable a much richer sense of the uses of the Internet and the ways in which local relationships shape its use as a technology and as a cultural context” (p. 60). Debates surrounding virtual ethnography concentrate on authenticity and identity, i.e. are the participants who they say they are? (see Wellman, 1996; Wellman and Hampton, 1999; Wellman and Haythornthwaite, 2002). However, such studies tend to focus on the pure online setting without an offline dimension. The richness of this study comes in the combination of both the online and offline observations and the exploration of learning spaces within these settings.

Whilst ethnography can enable an understanding of what people do with the technology Hine recognises that moving ethnography to an online setting requires some re-examinations of what the methodology entails. For example, she suggests that in an offline setting we might expect an ethnographer to have spent a prolonged period living or working in their field site:

“Moving this approach to an online setting poses some interesting problems: how can you live in an online setting? Do you have to be logged on 24 hours a day, or can you visit the setting at periodic intervals? Can you analyse newsgroup archives without participating and call that ethnography?” (2000, p. 21)

Conducting online and offline participant observation has practical implications. As mentioned, many of the texts on ethnography focus on the physical aspect of being an observer. For this study to be an ethnography the researcher must, as Atkinson, Coffey et al. (2001) state, have a commitment to the first-hand experience of a particular social or cultural setting. This would normally be through participant observation. As Merriam (2002) suggests, although participant observation is the primary method of data collection for ethnography:

“Interviews... and the analysis of documents, records and artefacts also constitute the data set along with a field worker’s diary of each day’s happenings, personal feelings, ideas, impression, or insights with regard to those events” (p.237).

Similarly Atkinson, Coffey et al. (2001) argue that the ethnographer may need to draw on a diverse repertoire of research techniques such as analysing spoken discourse, and textual and visual materials. Combining online and offline ethnography requires, as Hine (2000) notes, a rethinking of the relationship between ethnography and space. For Hine the Internet provides for ethnography to be differently organized in time and space. The social relations that constitute the ethnography can be forged across greater distances and outside instances of face-to-face communication (p.116). One interesting debate around conducting virtual ethnography lies in the participation and recording of the events and whether the ethnographer and participants need to share the same time frame. Hine suggests that that ethnography can be time-shifted so that the ethnographer's engagement can occur after the events with which they engage happened for participants (p. 23). I feel that because I am an active participant in LEAD and particularly on the LEAD forum, I have experience of what it 'feels' like to be a participant engaging with the dialogue on the LEAD forum. The communication on the LEAD forum is generally asynchronous so it would be hard to argue that participant observation can be carried out as and when every post is made within that space. Hine draws upon an argument from Reid (1995) who argues that (online) interactions lose their ethnographic meaning after the event.; the utterances of participants might be preserved, but the experience of participating is not. Along with Hine I disagree with this argument. Hine (2000) states "The ethnographer cannot stand in for *every* user and recreate the circumstances in which they access the newsgroup, but she can at least experience what it is like to be *a* user" (p.23). Certainly, I am *a* user and the posts I make on the LEAD forum are conducted in a different time and space than the other participants. I will go on to discuss this in more detail below.

The presence of the researcher, ethics and reflexivity

As with any ethnography the researcher cannot claim to be 'everywhere at once', or to record everything that happens within a particular group or context. Hine (2002) suggests that ethnographers in cyberspace can lurk in a way that face-to-face ethnographers cannot readily achieve. However, there are some ethical issues which need to be considered in relation to researching the practices online for the LEAD delegates. There are some ethical points to consider with regards to my role as Director of the LEAD programme and my relationship with the delegates. The pedagogy of LEAD is designed to provide spaces to alleviate the feelings of isolation experienced by owner managers of SMEs. These spaces enable leadership learning to take place. Some spaces are publically shared across the group whilst others are private and confidential between the delegate and the facilitator. Two examples of this include the one-to-one coaching and the action learning sets. Although I maintain quality assurance on these elements of LEAD, as Director and researcher I do not have access to either of these spaces. Coaching takes places face-to-face and over the phone with a professional business coach.

Although there is a space on the LEAD forum for coaching discussion to take place, it is rarely used by the delegates, as coaching is seen to be private and confidential between coach and coachee. The action learning sets however do have a space on the LEAD forum which is only open to each set member and the facilitator, i.e. the delegate only has access to the online space of their own set and not anyone else's. As an administrator on the LEAD forum I have access to all areas including all the action learning set areas. However, I have only accessed areas of the LEAD forum that the delegates know I have access to, i.e. even though I have administrative rights I have not looked at discussions online without permission from the delegates. As discussed above, I observed one of the action learning sets across the months of cohort 7. These observations took place both online and offline. Along with the coaching space I did not research the remaining three action learning sets which means that there are some learning spaces that I have not been present in.

Consistent throughout the data collection and analysis is the researcher's own reflexivity. As Director of the programme and community member myself I am engaged in a reflexive process akin to Alvesson and Sköldberg's (2000) reflexive methodology. The 'formula' for reflection is rich data plus breadth and depth in the repertoire of interpretation, enhancing the chance of 'empirically grounded imagination' (Alvesson and Sköldberg, 2000:251). The immersion of the researcher in the Community of Practice has interesting methodological implications as the Community of Practice has been constructed by the researcher who is also researching it from 'within'. The limitations of this paper mean that this point will not be explored here but suffice to say that it could be an area for further thought.

Reflexivity is an important part of ethnography, indeed any qualitative research. Mason (2002) notes that ethnographers have long sought to draw reflexively on their own experiences and perceptions, and to see these as part of their data. She proposes that the main challenge with this approach is to ensure that it is being done in meaningful and sensitive ways. There is a risk that the ethnographer will impose her own interpretation inappropriately or without justification (p.77). Mason suggests some ways around this which include keeping full records with justification for the researcher's own decisions and to be as systematic as possible about these matters. A word of warning is also offered:

“You are highly likely to conceptualise *yourself as active and reflexive* in the research process, not least because of the premium placed on the experiential nature of this form of data generation...you must not under-estimate the challenge of analysing your own role in this way, nor should you over-estimate your capacity to empathise with or 'know' the other, simply because you have participated in a shared setting as part of your research practice.” (Mason, 2002, p. 86)

Coffey (2002) suggest that the researcher's self has become a source of reflection and re-examination; to be written about, challenged and, in some instances celebrated (p. 313). Similarly, Krenske (2002) argues that the identification of the researcher's self within research texts acts to improve validity by demonstrating how data collection and data analysis may have been affected by the researcher's subjective reality (p. 285). Krenske argues that the explication of the researcher's self is an integral component in the research process. It is this gesture that acknowledges research is always accomplished through the subjective medium of the researcher. Hine (2000) points to the fact that the way an ethnography is presented is neither a truth nor a fiction, but an account of an ethnographically constructed field of social interaction (p.57).

Learning spaces with a Community of Practice

One of the findings within this research is the concept of learning spaces and behaviour at different points in time and in different places or across different spaces. The places can be physical or mental, real or imagined. There are indeed dedicated physical spaces where LEAD takes place, for example, the masterclasses, action learning sets, learning and reflection days, introduction to shadowing and exchanges all take place at Lancaster University in lecture theatres, the executive suite or in meeting rooms; other elements of LEAD such as the phone coaching and carrying out the shadowing / exchanges take place where the delegates choose (normally in the place of their work); there is also the online LEAD forum which can be accessed from anywhere with an internet connection. However, this just describes the 'mechanisms' of LEAD and is limited in understanding how the LEAD delegates are learning. An assumption might be made that some learning takes places when the delegates turn up for the LEAD events but ethnography on and offline shows there to be a deeper understanding or interpretation of how they are learning across spaces. These spaces serve different purposes, for example a masterclass is a 'taught' space whereby the speaker stands at the front (as 'dictated' by the room layout) and the delegates are expected to behave in a certain way (listening, being interactive at the request of the speaker etc). There are other spaces such as the refreshment break during the masterclass or lunch afterwards which has a different dynamic and many comments have been made about them learning from one another during this 'non-directive space', for example:

"Over coffee, I think that is very important, that break without that it would be just like sitting in a lecture. That is the learning. Because people tend to leave straight after the lecture so it is ...it works as place where people meet and work without trying which is part of its power" (LEAD delegate, cohort 5)

There are also spaces which go beyond the physical space that are relevant here. Jones et al (2007) conceptualize the idea of strategic space. This term is used to define as the time,

resources, motivation and capabilities needed for owner-managers to reflect on and review existing practices leading to learning, transformation and higher organizational performance. LEAD provides strategic space for the delegates through engagement with physical, mental and metaphorical space.

The pedagogy of LEAD is based on the premise that the space will foster peer-to-peer learning. Arguably, LEAD is one big peer learning space. However, there have been some interesting comments by the delegates and observations about the benefits they are experiencing from being with a group of like-minded people and people who share similar issues, for example this delegate makes a post on the LEAD forum space which is restricted to the other members in his action learning set;

Hi Team,

Just a quick line to say how much I enjoy the ALS, both presenting an issue, and responding to someone else presenting an issue. For me, it has made me start thinking about my business more objectively, it is making me create time to think about issues we have and how to resolve them. It is also remarkable how similar some of our problems are.

Peer-to-peer learning space
Reflective space

Personally I have started to make changes to my business as a result of a combination of the ALS and all the other aspects of lead, and I am starting to feel liberated.

Internal space

Before LEAD, there was a common objective I kept hearing which was 'to spend time working on the business rather than in the business' and I can really relate to that now. Also Frank Dick's closing words - 'If not you who, if not now - when'

LEAD learning space

(post on the LEAD forum by delegate, cohort 7)

I have put the entire post here because it also connects to some of the other learning spaces which are coming out from the research, namely reflective, internal and cross-LEAD learning spaces. These spaces are not explored in depth in this paper but it is suffice to say that the different learning spaces are relational.

Within these learning spaces the salience of discussions with their peers is an important factor, particularly on the LEAD forum. The learning is social with and from one another. There is a pedagogic assumption that they (their embodied selves and the knowledge they bring) are salient to one another. They constantly draw on each other's experiences because these experiences resonate with each other. The sharing of experiences, or salience of experiences, happens all the time across LEAD, this post on the online forum to the action learning set demonstrates the social view of learning,

Hi Charles

I really enjoyed the process itself although maybe my issue could have been thought about more before we met at the ALS. It is certainly a powerful process. I am thinking about issues in a different way now, and I too was surprised at how Adrian and Andy's issues were relevant to my business.

Thanks all for this week's ALS. I found it really fascinating insight into the kinds of things we're all thinking of running our companies - I was surprised how much was the same as issues I've been facing myself, but enjoyed learning the differences as well.

(post on the action learning forum, LEAD delegate, cohort7)

Learning to behave in the learning spaces

All learning communities develop their own discourse and behaviours. In Communities of Practice theory Wenger (1998) refers to this as shared repertoire which “includes routines, words, tools, ways of doing things, stories, gestures, symbols, genres, actions or concepts that the community has produced or adopted in the course of its existence, and which have become part of its practice.” (1998:83). There are constructed learning spaces within LEAD. For example, a masterclass takes place in a lecture theatre, action learning sets in a small space with a circle of chairs, coaching over the phone in a place of the delegate’s choice and so on. These spaces generate different behaviours and the delegates develop a collective understanding of how to operate and behave in these spaces. The discourse across these spaces is influenced by the type of learning space. In this sense LEAD can be considered to have what Gherardi et al. (1998) term the situated curriculum. Gherardi et al. use the term in the context of work activities learnt by novices. Here, it is argued that the LEAD delegates learn the work practices of the LEAD Community of Practice through a situated curriculum. One example of this can be seen with the action learning sets. As the action learning set progresses and the delegates learn how to ask open questions they learn that this is a space where they don’t give one another direct advice. During an observation of an action learning set one LEAD delegate asked the group to tell him what to do even though he had seen the benefit of addressing an issue through open questions. The other set members all responded saying things like, ‘we’re not allowed to do that’ or, ‘we don’t do that here’.

The social view of learning is heightened in these learning spaces as much of the learning occurs through the salience of the conversations between the delegates and in the informal learning spaces:

“I always knew that I would get a lot of value out of LEAD just being in the presence of these people, because they have got so much to offer and to that end, I am always willing to listen”. (LEAD delegate, cohort 3)

Lave and Wenger (1991) advocate a practice-based theory of learning which supports LEAD as (shared) practice is very reason that the LEAD comes together and circulates (salient) knowledge. As one delegate states:

“It is meeting new people, it is meeting people in different businesses. It is finding out how they started...how did they get to the place they are now, what are some of the difficulties, what are some of the problems they are facing. It is just surprising that you are not alone, because of sharing ...you may find that you have a suggestion, 'have you thought?' ... 'try this route if you are having this problem'. That happened to me.” (LEAD delegate, cohort 4)

The delegates almost learn how to ‘be’ a LEAD delegate and they protect the different learning spaces so that when someone who doesn’t have the social (or digital) capital enters one of the spaces they are not treated the same way as those who has legitimacy to be in these spaces. There is also an understanding that some of the spaces can be used differently. For example, I received this email from one of the delegates which shows that there is a certain value or understanding placed on the forum as a tool for communication versus email;

Hi Sue

Just a quick question which I didn't really want to send via the Forum - partly because I feel like it sounds like I'm moaning....

(email from LEAD delegate, cohort 7)

In contrast this post shows that the delegate feels the LEAD forum is more appropriate than email to share their thoughts;

Was going to send an email but then thought it might be more useful to contact you on here so that everyone can see the answer - I'm learning!!

(post on the LEAD forum by delegate, cohort 7)

There is also an understanding on how to behave on the forum which can be seen with (part of) this post,

...P.S. I was going to p.s. something quirky but it may not be netiquette!

(post on the LEAD forum by delegate, cohort 7)

Discussion and Conclusions

Conducting an ethnography of cohort 7 has enriched my understanding and interpretation of the data. The virtual ethnography may be considered to be a method of data collection within a wider ethnographic project. Certainly, the online and offline observations enabled me to have a fuller understanding of how they SMEs were learning on the LEAD programme. Ethnographic texts are the primary texts given for the interpretive, ethnographic project. Denzin contends that ethnographic texts are always dialogical, “the site at which the voices of the other, alongside the voices of the author, come alive and interact with one another (Denzin; 1997: p. xiii). I would argue that had I not been a user and participant myself of the LEAD forum the data (or text of the discussions online) would not come alive or be as open to the cultural interpretation which I have given to them. Likewise, the interview data I collected on the previous six cohorts did not provide a rich enough understanding of the learning across LEAD without the ethnography. It is because I am part of the cultural phenomenon being studied that I have been able to interpret the data and provide a greater understanding of how this Community of Practice learns. In conclusion the ethnography, both physical and virtual, provided greater insight to the learning spaces. The virtual ethnography allowed greater access to the community during times when they weren't physically co-located and at many different times of the day. The strength of this research project lies in the combination of an offline and virtual ethnography.

LEAD is part of the knowledge exchange agenda which engages small businesses into the university in non traditional forms. Knowledge exchange is a growing area across UK Universities and this research can contribute to our understanding of how owner managers of SMEs learn and how universities can better themselves at knowledge exchange meeting the needs of the stakeholders involved.

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