THE NATURE OF QUALITATIVE RESEARCH: REFLEXIVITY AND PHILOSOPHY

Qualitative social research has traditionally been distinguished from its quantitative counterpart by its commitment to asking ‘why’, ‘what’ and ‘how’ questions about social phenomena – rather than ‘how much’ and ‘to what extent’ questions. Its vocation is therefore to discover or interpret the substance of social life rather than measure any particular dimensions of it (Denzin and Lincoln 1998; Denzin and Lincoln 2011; Spencer et al. 2014). In this process, the researcher as subject of knowledge and valuation engages in illuminating not only the reality they are studying but also themselves in relation to that reality and their participation in it. As Spencer et al. (2014: 1) put it, ‘qualitative research is an engaged way of building knowledge about the social world and human experience, and qualitative researchers are enmeshed in their projects’. Thus, qualitative research is not just a complement set to answer questions that quantitative research cannot address, but represents a distinct body of research practices, with its own rigours and standards (Denzin and Lincoln 2011). One
such distinctive characteristic of qualitative research is its propensity for reflecting on its own practice and on the relationship between researcher and researched. Within this relational process, qualitative inquiry is, by its very nature, bound to delve more deeply into foundational, philosophical questions.

Although explicit reflection on one’s own philosophical assumptions is a matter of crucial importance for both quantitative and qualitative research, thus suggesting that the distinction between the two approaches may have been overplayed, it has been recognized as a prominent feature of the latter, based on an understanding of social phenomena as open to complex, unpredictable change and influence from the researcher’s gaze as creative of worlds rather than merely recording external stimuli ((Morgan and Smircich 1980: 498):

Quantitative techniques may have an important but only partial role to play in the analysis and understanding of the process of social change… The requirement for effective research in these situations is clear: scientists can no longer remain as external observers, measuring what they see; they must move to investigate from within the subject of study and employ research techniques appropriate to that task.

Qualitative research is therefore at home in the social sciences, expanding the breadth and depth of the research effort to more appropriate levels.

Just as for quantitative research, the philosophical foundations of qualitative research refer to certain assumptions that its various paradigms and approaches have to rely on, by logical necessity, in explaining and justifying themselves – in terms of their various
interpretations of the nature of the phenomena under study; the role and status of the researcher; the nature of the relationship between researcher, other human beings and (non-human) phenomena; and the defining features of the research process as a relation between theory and practice. As a social process of inquiry for the purposes of advancing knowledge, research is inescapably grounded in the researcher’s worldview (Geertz 1989). Therefore, its philosophical propositions, as answers to first-order questions, are omnipresent, whether acknowledged or not. Even a researcher who dismisses the need for philosophical reflection on the basis that their job is to respond to the question ‘What is happening out there?’ by simply reporting what they observe takes the implicit stance that one can know reality as it is, without mediation – thus plunging into one of the most controversial ideas in the history of philosophy.

At the heart of any ‘why’ question in qualitative inquiry there is a philosophical axiom – that is, a proposition believed to be self-evident or to require no demonstration, which logically establishes the truth of all other valid inferences made in the research process. This axiom is of philosophical interest in that it ultimately relates to a first-order, all-encompassing, universal question of the kind: what is the nature of reality? of human knowledge? of value? of purposeful human action? But what an empirical researcher is prepared to take for granted can cause headaches for generations of philosophers.

Reflecting philosophically on our research axioms enables us to maintain our intellectual acuity under the pressure of the most numbing analgesics.

One such analgesic dwells in the separation of organizational research from primary social research domains such as sociology, psychology, anthropology, economics and
political science. Our focus on organizational research here does not seek to tear it away from its humanist roots in order to justify instrumentalist objectives as points of distinction. On the contrary, it is meant to illuminate how specific concerns of organizational research are related to and embedded in the broader concerns of primary social inquiry. Hence, the purpose of this chapter is to explore the types of philosophical questions addressed in the assumptions adopted by various streams of qualitative organizational research; discuss the various paradigms, conceived as sets of philosophical assumptions, their influence on the study of organizations, and approaches to paradigm classification most popularly adopted in this field; and evaluate the challenges and opportunities experienced by qualitative researchers in advancing humanist (rather than instrumentalist) knowledge of organizations in theoretically sound and practically meaningful ways.

PHILOSOPHICAL SPHERES IN QUALITATIVE ORGANIZATIONAL RESEARCH

Traditionally, philosophical assumptions in qualitative social research have been grouped into three main categories – labelled as pertaining to ontology (as philosophy of existence and reality), epistemology (as philosophy of knowledge), and axiology (as philosophy of value). Due to our focus on the study of organizations, our discussion of philosophical foundations of qualitative inquiry has five important points of departure from similar explorations of qualitative social research in general. First, we emphasize the particular relevance of ontological assumptions of becoming and not only of being, about processes and not only about states – by illustrating the role of process philosophy
in enriching the theoretical perspectives of organizational research. Second, we nuance
the objectivist-subjectivist distinction employed in classifying organizational ontologies
and epistemologies (see Burrell and Morgan 1979) by appealing to fallibilism as a meta-
critique of knowledge claims, and thus opening the possibility for more refined
perspectives on ‘constructs of dubious ontological status’ typically produced in
organizational research, such as ‘structure, culture, leadership’ (Powell 2001: 24) and
even organization itself. Third, we distinguish between axiology (as the domain of
meta-ethics and theory of value) and its applications, in the form of ethics and politics
of value – and we take a closer look at the role of ethical and political questions in
informing various research paradigms in the study of organizations. Fourth, we
distinguish between the concept of ‘methodology’ in philosophy (as reflection on the
practice of philosophy itself) and the role of philosophical assumptions (usually
belonging to one of the other philosophical categories – such as ontology, epistemology,
or ethics) in legitimating the methodology of empirical organizational research. Finally,
we add to the discussion the rather neglected philosophical area of praxeology, as
foundational reflection on the nature of purposeful human action, hence of both research
practice and organizational action as particular cases of it. Praxeological assumptions
are particularly important in organizational research because they provide the logic
underpinning the relationships among modalities of existence, possibility and value, and
they indicate how these modalities should be articulated and integrated in legitimizing
the research project. Hence, we will discuss questions pertaining to four philosophical
spheres – namely, the ontological, epistemological, axiological and praxeological – and
relate them to issues of research practice that are specific to organizational inquiry.
The Ontological Sphere

Ontology is the domain of philosophy that deals with questions about being and becoming. The nature of reality – that is, of what exists, in whatever form or process, whether independently or in some relation to us (and to other ‘things’ that exist) – is its concern. Hence, most statements in ontology are ‘is’ statements. In other words, the language of ontology relies on modalities of existence.

Organizational qualitative research practice shares with the wider domain of social research in general the preoccupation for cogently explaining the nature and status of various phenomena under study, especially in relationship with the nature and status of the inquirer (Delanty 2005; Denzin and Lincoln 2011; Rosenberg 2008). Hence, some social research theorists have found it difficult to separate between ontological and epistemological questions in this domain (see Burrell and Morgan 1979). It does, however, also raise specific questions about the organization, our central object of inquiry. Such questions could be: what kind of ‘thing/it’ is an organization? what kind of reality is it an example of? what kind of ‘things’/reality/realities exist in, and in relation with, an organization? and, what is the nature of (organizational) reality for an organizational researcher? Does the fact that we tend to approximate definitions of organizations by metaphors (see Morgan 1997) indicate an ontological complexity we are not quite prepared for?

As an alternative to analogical-metaphorical thinking, some organization theorists have taken an active interest in process metaphysics (see Whitehead 1929/1967; Bergson
1946; Rescher 1996) in order to better explain how organizational phenomena, never static, morph and de-morph continuously in successions of emergent events rather than designed structures. This increasingly influential body of work has played a crucial role in contemporary developments in the study of identity (Schultz 2012), materiality (Carlile et al. 2013), sensemaking (Hernes and Maitlis 2010) and change (Langley et al. 2013) in organizations.

**The Epistemological Sphere**

Epistemology’s representative action verbs are: *knowing; believing and doubting; verifying* and *falsifying*. Most generally, this sphere deals with how we human beings acquire and develop knowledge about reality. The language of epistemology is therefore dominated by ‘can’ propositions – or, otherwise put, the modality of possibility.

The qualitative organizational researcher shares with the social researcher in other fields a concern for the quality of evidence and its role in establishing trustworthy belief, in developing sound criteria for such trustworthiness (Denzin and Lincoln 2011). Furthermore, they both ask themselves: do we access the ‘reality’ under study *as it is*, or are there angles, filters, biases and limits in our attempts to understand it?

More specifically, however, the organizational researcher is interested in understanding the nature of the knowledge involved in the particular ways in which organizational phenomena can be known. Reflection on foundational epistemological commitments is essential to good research practice, helping the researcher understand and cope with the
realization that making such commitments is unavoidable, while any particular commitment is contestable (Johnson and Cassell 2001). The objective-subjective dichotomy most often used in encapsulating the range of researchers’ views of the nature of the knowledge they produce, namely, as truth available out there, independently of the enquirer, versus as a reciprocal construction of belief in the interaction between researcher and researched, can be both transcended and relativized by considerations of fallibilism, whereby the possibility of not knowing (or failing to know) the truth of any epistemological premise is never completely removed, in any process of inquiry, however coherent (Gettier 1963). It is philosophical reflection that enables us to ask critical questions such as (Powell 2001: 23):

Which theories of truth… do organizational researchers explicitly or tacitly accept? What kinds of propositions… dominate organizational discourse? What foundations… do organizational researchers use to justify knowledge claims? In what sense do organizational researchers regard their claims as true and warranted?

In doing so, qualitative research paves the way for suitably comprehensive reflection on social phenomena for quantitative analysis as well.

**The Axiological Sphere**

By definition, axiology deals with *value* and (particularly relevant for organizational research) *valuing*. Its propositions are mainly modals of obligation and normativity – that is, they are ‘should’ propositions. Their subject is the nature of value and valuing.
processes. It has been said that, in social research, axiological assumptions refer to the values of the researcher and how they influence the research process (Spencer et al. 2014), but studying organizations adds new layers of complexity to axiological questions, which require deeper levels of reflection on the challenges posed by organizations and their management practices, as symbolic realities (Kostera 2012; McKinlay et al. 2012), to the researcher-researched relationship.

In this chapter, we will set aside primary axiological questions, such as what is the nature of value?, and explore instead two of its discrete applications, in the form of ethics (which deals with values of the Good), and political philosophy of value (which deals with values related to the Powerful, or Power). Questions of ethics in qualitative organizational research are, fundamentally, concerned with reasons why the research is considered worthwhile, with its ultimate purpose. Here one can identify, across the field, a wide range of answers, from those anchoring the Good in meeting the needs of organizations and management practitioners (Argyris 1964, 1993; Herzberg et al. 1959; McGregor 1960) to those that go beyond organizational rationale and give primacy to improvements in the human condition – be it in the well-being of individuals, groups, communities, or society more generally (Dierksmeier 2016; Mele 2016). Whether instrumentalist or humanist, or enacting combinations in between, organizational researchers will adopt an ethical stance, be it explicit or tacit.

In the realm of normativity there are also political questions to be addressed, such as: what is the role of the researcher? should research inquiry convert into, or be driven by, a political agenda? and, if so, what should this agenda be set to achieve? In this context,
the *politics* of research calls for *ethical* justifications of its own (Rosenberg 2008). The reflective researcher will not only be interested in understanding who benefits from their research, or whose interests are well represented and whose are ignored or undermined, but will also be prepared to question the political and ethical legitimacy of a variety of qualitative research approaches, including their preferred stance: on what *ethical* basis should the premises of the research project’s *political* agenda, or their political implications, be accepted? Increasingly, organizational theorists have grown to acknowledge that all research has political implications – even when no political goals are explicitly adopted. The usual effect of the latter is one of adding epistemic legitimacy and support to the social and political status quo (Dehler and Welsh 2016; Klikauer 2014). It is therefore not surprising that a counterbalancing research agenda, aimed at voice-giving and emancipation of the subordinate, the disadvantaged, the vulnerable and the oppressed has to not only to be explicit but also challenge the very possibility of value neutrality in organizational research generally, irrespective of theoretical-philosophical persuasion.

**The Praxeological Sphere**

Understood as the philosophical domain studying purposeful human action (Alexandre and Gasparski 2000; Kotarbinski 1965), praxeology can be defined in terms of *choosing, (en)acting, applying, practising and performing*. Therefore, we argue, it is to this heading that our theoretical discussions of methodology in organizational research should be more appropriately subsumed, given that insights into the philosophy of designing purposeful human action have a central role in the conceptualization of
research methodology applications as both structured and agentic practice. In support of this suggestion, we note that methodologically reflective questions (that is, meta-questions) about research design are often so similar, in essence, to praxeological questions, understood in a broad (non-economistic) sense. Keen to address the confusion, often encountered in the literature, between philosophical and derived (second-order, empirical domain-generated) questions in research methodology, Delanty (2005), for example, clearly distinguishes between philosophy and methodology in social research.

Appeal to praxeology enables us to discuss in a more systematic fashion important debates in organizational theory around the *performativity* and *anti-performativity* of particular kinds of research practices and critiques (Delbridge 2014; Fleming and Banerjee 2016; Schaefer and Wickert 2016). Moreover, for organizational research, Bourdieu’s social praxeology (Bourdieu 1977, 1990) is particularly relevant, as it explores the possibilities of research as action upon and produced by organizations as symbolically mediated entities (Everett 2002).

**RESEARCH PARADIGMS IN ORGANIZATION STUDIES: EXOGENOUS INFLUENCES AND ENDOGENOUS ISSUES**

Inspired by epistemologies of the natural sciences, social research has a long tradition of grouping its practices into *paradigms*. According to Kuhn (1962/2012), a scientific paradigm is an exemplary way of practising research generally accepted by a community of researchers, in a given period. A paradigm is informed by a particular
worldview and, related to it, a particular perspective on the purpose, nature, structure and standards of the research process. Its most fundamental assumptions about the research world – including multiple and nuanced relations between researcher and researched – are philosophical, most usually pertaining to the four spheres previously discussed. It is a well-established convention in philosophical explorations of qualitative social research to outline and structure the evolution of theoretical thinking in the field in terms of a (more or less) historical sequence of paradigms (see Creswell 2014; Crotty 1998; Delanty 2005; Denzin and Lincoln 1998; Guba and Lincoln 1994; Ormston et al. 2013; Prasad 2002; Trigg 2001).

For the purposes of a summarized discussion, four of the broadest, most distinctive paradigms have been selected here: namely (post)positivism, social constructionism, critical inquiry, and pragmatism. In focusing on the first three, we are guided by Habermas’s (1971/2015) analysis of knowledge as related to human interests. Accordingly, the connection between empirical and analytical research approaches and technical interests is represented by (post)-positivism; historical and hermeneutic knowledge directed by practical interests is discussed under social constructivism; while critical inquiry reflects critically oriented (and, one may say, subversive) knowledge driven by emancipatory interests. We add pragmatism as one of the most influential paradigms of social research since Habermas’s categorization was published. We will explore the key features of each of the four paradigms in turn below, also with reference to sub-paradigms that have proven relevant in the study of organizations.

Post-Positivism
Following anti-positivist critiques in both natural and social sciences, post-positivism amends and improves, philosophically and methodologically, on a position that remains, in essence, ontologically realist and epistemologically objectivist. While confidence in absolute, universal, complete and non-interventionist knowledge may have waned under the influence of Heisenberg’s indeterminacy principle (Lindley 2008), Popper’s (1964) falsificationist criteria (Popper 2005) and Gettier’s (1963) fallibilist argument (Powell 2001), in post-positivism the researcher’s orientation for methodological development is still guided by the goal of apprehending reality (believed as identifiable, in significant ways, as independent of our consciousness) through as little intrusion and influence as possible. Truth is still to be discovered rather than constructed, with testability, replication and predictability remaining central concerns for the research project – although, unlike in classical positivism, the ultimate goal is now probability rather than certainty. For the post-positivist researcher, the world, regarded as a collection of objects, can be known, albeit partially, with satisfactory approximation to its objective state, using methods based on rigorously assessed evidence. Unified and unifying standards of evidence assessment continue to represent the progressive ideal of the disciplined researcher, who should perfect their instruments to reduce impact of their own intervention and bias, and to exclude value judgments.

An incursion into the evolution of organizational qualitative research literature suggests that, to start with, post-positivism is not meant to be the natural ground for qualitative research anyway, as the latter has historically distinguished itself and gained independent legitimacy by promoting interpretive methods that break with foundational
realism and objectivism altogether. Yet editors of major organizational research journals continue to report that a significant amount of qualitative post-positivist research is consistently being submitted and published in the field (see Rynes and Gephart 2004; Skinner et al. 2000). They also signal combinations of qualitative and quantitative methods, and draw our attention to potential pitfalls created by using research standards and criteria unreflectively. Although it may appear easier to invest in confidence in our epistemic proximity to reality, as it seems to reduce the need for scrutinizing discrepancies between the world and our mental models, potential limitations and distortions induced by the research process may eventually compromise the value of the research endeavour itself.

We note that, in the positivist tradition of organization studies, qualitative research is treated as complementary to its quantitative counterpart, in recognition of the fact that the two streams specialize in addressing different types of research questions. Anti-positivist critiques have played an important role in qualitative research gaining both theoretical and empirical ground in more recent times. For example, a topic such as human needs in organizations, once dominated by positivism and quantitative methods (see the industrial psychology movement directed by the works of Herzberg, McGregor, McClelland, and others), have more recently been rejuvenated through qualitative methods driven by interpretive and critical perspectives (Contu et al. 2010; Hancock 1999; Townley 1995).

Social Constructionism
Made explicit in Berger and Luckmann’s book *The Social Construction of Reality* (1966), the notion of social constructionism opposes the key ontological and epistemological tenets of positivism and post-positivism by arguing that social reality is not populated by objects but created by subjects through their experiences and relationships. Social context dependent, Reality can consist of multiple realities. This is because knowledge is mediated by meaning creation – a process characterized not by discovery but by social interaction and negotiation. There is no knowledge until the data is interpreted – and interpretation is a matter of inter-subjective construction, not objective emergence.

The relativism introduced in social research by social constructionist positions, primarily through the privileging of qualitative approaches (Czarniawska 2009; Holstein and Miller 2006), has led to a proliferation of varieties of social constructionism, identified by some theorists as historical-genealogical, discursive, narrative, interpretive, claim-making, and contextual (see Holstein and Gubrium 2013), or as symbolic interactionism, phenomenology, ethnomethodology and hermeneutics (Spencer et al. 2014). In this context, organizational research has proven a fertile ground for the application of social constructionism. Some theorists have even argued that the whole domain of administrative science, for example, can only produce subjective, socially constructed truth. As the dominant medium of social knowledge is language, organizational researchers necessarily produce language that is ambiguous, metaphorical, performative. As such, language structures and shapes the knowledge it identifies and communicates (Astley 1985). With the ‘linguistic turn’ as the clearest and strongest feature of anti-positivism (Rorty 1992), the Enlightenment’s ideal of
transparent and exact scientific language as a neutral vehicle for universal knowledge is dealt a lethal blow.

Most streams of social constructionism theorized by philosophers of the social sciences have had their schools of thought and seminal effects on qualitative organizational research. We will expand on two of the most representative sub-genres of social constructionism here – namely, phenomenology, and historical-genealogical studies – in each case emphasizing research challenges that are specific to the study of organizations.

The **phenomenological approach** has its origins in the philosophy of Edmund Husserl (1931), whose core tenet is that our experiences are the source of all our knowledge of reality. Thus, the phenomena we can and should study are not events as they occur in the world but our experiences of those events. The outcomes of research are not neutral accounts of independent objects of inquiry but explicitly acknowledge characteristics of experiencing subjects (including the researcher), of the ways they make sense of the world through their experiences. For phenomenologist social researchers (see Sanders 1982), there is no social reality other than that created by people’s perceptions, moulded by their social context. As Husserl (1931) explains, the centrepiece of phenomenological research is intentional analysis, which focuses on *intentionality* as the relationship between the external source of the subject’s experience and its effects in the subject’s consciousness. This approach is further developed by Heidegger (1988) into hermeneutics, an interpretive philosophical method coherent with the ontological and epistemological tenets of phenomenology.
Husserl’s and Heidegger’s ideas have been summarized and applied for the purposes of qualitative research in the social sciences by Moustakas (1994), who describes as specific to phenomenological research those methodologies anchored in ethnography, grounded theory, hermeneutics, empirical phenomenological study, and heuristic research. Empirical phenomenological research, in particular, relies on the analysis of subjective accounts of events, provided by individuals who are interviewed and/or observed in a privileged position of experiencing those events. In the study of organizations, Sanders (1982) outlines a phenomenological research model for the discipline of management, stating its main contribution to the field in terms of a significant enhancement of the researcher’s ability to delve into the deeper structures of phenomena, in ways that would not be available to the established scientific-normative paradigms. However, as Gill (2014) remarks, very few organizational studies have actually applied Sanders’ model. Other sources of reference have been Giorgi (2010) and Smith (2004) in psychology, Van Manen (1989) in education, and Benner and Wrubel (1989) in nursing. Gill (2014) suggests that there are at least two directions available for organizational research to advance knowledge using phenomenological methodologies. The first is to refer to the philosophical work of Merleau-Ponty (1964), by paying attention to the relationship between conscience and body, their role in shaping experiences – and thus making embodied experiences the focus of research into organizational phenomena. The second makes appeal to Schütz’s sociology (1967), in particular his idea of inter-subjectivity. Schütz’s work has already generated important streams in the organizational studies field, such as sense-making research (see Weick
1995), but its potential for studying various types of organizations as inter-subjectively generated social worlds is much wider.

The **historical-genealogical approach**, largely represented by the philosophical and methodological ideas of Michel Foucault (*Discipline and Punish* 1977/1979, *The History of Sexuality* 1980-1990, *The Care of the Self* 1988), has exercised for decades a significant influence on qualitative organizational research. As explained by Miller (2013), Foucault’s work guides our understanding of how discursive constructions of human beings into subjects (as subjected objects of power) occur in organizations. The socially created subjects of reality are disciplined into being through techniques of surveillance, understood as hierarchical observation, and normalizing judgment, that is the evaluation of individuals by reference to a given standard of normality. Thus, socially institutionalized power produces both ontologically (i.e. forms and structures of ‘reality’) and epistemologically (i.e. ‘objects and rituals of truth’) (Foucault 1979: 194).

Like prisons, hospitals, schools and universities, organizations of all kinds apprehend individuals as docile bodies disciplined through discourse. But it is the organization’s dominant discourse that defines normality, not autonomous voices of individuals – thus sentencing the silenced alternatives to powerlessness, vulnerability and disadvantage.

The extraordinary self-reproducing power of this dominant discourse resides in its ability to incorporate into its self-established structures concern for the needs of individuals and for their agency, transforming them into voluntary instruments of their own alignment with their organizationally defined identity – and, therefore, instruments of their own control by the organization.
Using a Foucauldian lens, Fairhurst and Putnam (2004) identify three ways in which the relationship between discourse and organization can be interpreted – namely, as an ‘object’, as a condition of ‘becoming’, or as ‘grounded in action’ (Fairhurst and Putnam 2004: 10). They advocate for all three perspectives to be engaged in the research design, so that richer data can be secured. This does not require making the three orientations theoretically compatible but holding them in tension with each other, in order to illuminate the relative, contextual nature of the findings produced by each approach. In another application of social constructionism, this time to studies of strategic management practices in organizations, Samra-Fredericks (2008) shows how Foucault’s views of subject-constitutive discourse contribute to ‘researching the every-day fine grained constitution of phenomena’ (Samra-Fredericks 2008: 140). Similar studies of discourse-constructed organizational processes have been undertaken in entrepreneurship (e.g., Downing 2005).

The combination of a radical subjectivism with the analysis of institutionalized systems of definition and control of the subject (Baudrillard 1988), and with a social theorizing of the human condition as ontologically and epistemologically contingent (Arendt 1958; Lyotard 1984; Heller and Feher 1989) has led to *postmodernism*, a paradigm of social and organizational research increasingly recognized as distinct. Postmodern thinking, characterized by an extensive relativization of knowledge foundations (Lyotard 1984) and a cultural turn (Rowlinson and Hassard 2014), has challenged the study of organizations to pursue innovative directions, such as the de-differentiation of phenomena and the blurring of boundaries between agency and structure (Clegg 1990), experimentation with post-bureaucratic organizational forms (Parker 1992), the
replacement of explanations based on institutional logics with a deeper understanding of ‘signifying acts originating in imagination’, such as ‘social practices and rituals’ (Komporozos-Athanasiou and Fotaki 2015: 334), and emotional empathy and aesthetic appreciation of abuses of power, with a view to increasing individuals’ resistance to autonomy-suppressing organizing (Hayes et al. 2016).

Both Foucauldian constructionism and postmodernism have been accused of ultra-relativist ontologies and nihilist epistemologies leading to paralyzing despair in crucial issues of ethics, politics and praxis. Understanding agency as de-centred away from the individual and, instead, diffuse across complex social relationships is seen as severely impairing individuals’ capacity to induce social change (see Michael 1996; Newton 1998). This view of subjectification as implying loss of agency and power to effect social change has, however, been questioned by Caldwell (2007), who in response argues that, to move organizational research forward, ‘a synthetic and practice-oriented concept of agency would have to mediate between classical ideas of intentional action, autonomy and choice and ideals of embodied agency as always changing and always open to reinvention’ (Caldwell 2007: 21).

To help overcome some of the limitations of current social constructionist research in organizations, Hosking (2011) proposes a new type of constructionism, namely, relational constructionism, which is arguably more appropriate for organizational research. Here the hard, essentialist self-other distinction is replaced by a soft, diffuse relation which assumes that persons and worlds emerge through dialogical processes. The most significant implication of this approach is that it affirms ‘dialogical practices
as ways of relating that can enable and support multiple local forms of life rather than
imposing one dominant rationality on others’ (Hosking 2011: 47). Hosking’s proposal
can be better understood in the context of responses to postmodernism from critical
inquiry (in particular Habermasian theory of communicative action, 1984, 1985) and
pragmatism (see Rorty 1992).

Critical Inquiry

Following the ontological and epistemological implications of social constructionism
away from the (post)-positivist agenda and into a focus on ethical and political
implications for qualitative research, we use the umbrella term ‘critical inquiry’ to label
a wide spectrum of philosophical-theoretical perspectives where the values of the
researcher are made explicit and called to legitimize the research process itself as a
factor of both knowledge production and social change. Central to this movement is the
intellectual tradition instigated by the Frankfurt School, with the works of Horkheimer
(1947), Adorno (1966/2012), Marcuse (1964), and later Habermas (1971/2015, 1984-
1985) and Honneth (1991). Taking distance from previous aspirations (in both
positivism and some forms of social constructionism) for research to be descriptive,
explanatory and value neutral, critical theorists insist that values and value judgments
are inescapable and that, consequently, research is a political act. Noting that claims of
value neutrality at best unwittingly reinforce the status quo and at worst are used to fix
the existing social order rather than explore alternatives, critical theorists advocate for
social research linked to ‘a progressive political agenda’, which reveals ‘inequalities and
injustice’ (Baert 2005) and takes normative positions conducive to significant social change.

Critical theory shares with the wider social constructionist and interpretivist movements the notion that social reality, shaped by economic and political forces into social structures, can only be known (inter)-subjectively. It is the emphasis on the role of values, as socially and historically constituted and mediated by power relations, that clearly distinguishes critical research programs from descriptive social constructionism. Inspired by an active care for human suffering, critical inquiry is attracted to contexts of disadvantage and discrimination – seeking to reveal silenced voices, emancipate oppressed social categories, and challenge the existing social order. Influenced by Marxist analysis and critique of ideology, the work of critical theorists illustrates how ‘we can discover our real interests and the interests of those who encourage ideological delusion even when they themselves do not realize what their interests are’ (Rosenberg 2008: 131). Rosenberg suggests that, while the application of Marxian theory to socio-economic exploitation enacted in employment relations may have failed in practice, its fundamentals of ideology critique can still be fruitfully engaged in examining gender, race, or sexual orientation. For us, this explains why and how critical theory has proven to be a fertile ground for the emergence of a range of emancipatory social research perspectives and programs, such as feminism, critical race theory, queer theory and post-colonialism.

In organizational research, critical theory has informed not only labour process theory, as the expression of a traditional Marxist interest in the political economy of labour-
capital relations, but also many other spheres of social discrimination and inequality. As Alvesson and Deetz (2006: 259) point out,

the central goal of critical theory in organizational studies has been to create societies and work places which are free from domination, where all members have an equal opportunity to contribute to the production of systems that meet human needs and lead to the progressive development of all.

In doing so, critical management research has been established as an increasingly strong area of critique of not only traditional positivist and interpretivist paradigms but also of early Marxism, in particular its monistic materialism (Baert 2005). For example, Wray-Bliss (2002) undertakes a critical analysis of British labour process research and shows how, despite an emancipatory agenda, it appropriates worker subjectivity and, in particular, the voices of women and other marginalized groups.

According to Adler et al. (2007) and Thompson (2009), it is the task of critical management studies to revitalize labour process theory through an agenda of changing management practices by continuously questioning the political economy of the employment relationship in capitalism and thus seeking to transform it from within. More broadly, critical management research is defined as an anti-performative endeavour focusing on reflexivity, denaturalization of entrenched social practices and relations, deconstruction of ideology, and humanization of management practices in general (Fournier and Grey 2000). For this purpose, Mir and Mir (2002) apply Wright-
Mills’ concept of sociological imagination to organizational practice, define the concept of organizational imagination, and argue for an active role of the researcher in questioning and transforming social institutions to benefit the powerless. Inspired by this idea, we can further suggest that the research imagination has developed new sub-paradigms of emancipatory studies of organization. For example, Benschop and Verloo (2016) note that feminist approaches to organization studies (as outlined by Calás and Smircich, 1996/2006) have cross-fertilized with post-colonialist perspectives (see Prasad 2003; Westwood and Jack 2007; Westwood et al. 2014), leading to postcolonial feminism as a productive direction of organizational research (see Özkazanc-Pan 2015). Despite its seminal influence, critical management and organization research has also received its own, endogenous, critique. Fletcher and Seldon (2016), for instance, have recently evaluated and classified critical approaches to entrepreneurship, distinguishing between consensus and dissensus approaches – that is, those engaging in critique for entrepreneurship as a practice that requires reflection and improvement, and those adopting a critique of entrepreneurship itself as a fundamentally problematic practice.

To summarize, in reaction to (post)positivism, interpretive paradigms such as social constructionism and critical theory (together with related emancipatory approaches) have earned the status of legitimate research projects in their own right, with philosophical-theoretical foundations just as rigorous as the positivist (Denzin and Lincoln 2011). However, while some organizational theorists (see Prasad and Prasad, 2002) take a conciliatory position which does not seek to displace (post)positivism but achieve comparable legitimacy for interpretivist perspectives, critical theorists have consistently and fundamentally questioned the legitimacy of positivism (Fournier and
Grey 2000). This line of thought has also led to interventionist research in organizations (see Baard 2010), which seeks to not only critique the foundations of the social systems and structures observed but also to change them through the research process itself.

**Pragmatism**

Originally informed by American pragmatist philosophy, in particular James (1907), Dewey (1929/1984), Peirce (1934) and Rorty (1992), the pragmatist perspective in social research proposes that we should abandon any aspiration to forms of knowledge that transcend contextual (historical and cultural) boundaries and that truth itself is, can and should be defined in terms of successful consequences, depending on the values and interests embedded in the research endeavour as a social project (Baert 2005). Rorty (1992) agrees with Kuhn (1962) that there is no universal and perennial criterion of scientific success and that such criteria are culturally determined through conventions of the scientific community of each era. But pragmatists do not only criticize (post-)positivism for its naturalist and mimetic fixations – that is, its ‘spectator theory of knowledge’, as Dewey (1929/1984: 19) puts it. They identify deeply seated deterministic tendencies in interpretivist and critical post-Marxist approaches as well. Both the American New Left, represented by Wright-Mills, for example, and the cultural Left of European source, derived from the works of Foucault (1979, 1988) and Derrida (1967) – the former for preserving residues of Marxist historical determinism, and the latter for inducing a new form of determinism through its self-referential discourse – are found unable to construct solutions and achieve political impact (Rorty 1992).
As Habermas (1971/2015) suggests, at the intersection of pragmatism and critical theory, research (and especially social research) is a form of social action reflecting the cognitive interests and needs of a particular society’s research community. Hence, there is no essence that can be attributed to scientific inquiry as such, and knowledge develops through non-representational dialogue between historically and culturally situated researchers (Rorty 1992). At first sight, pragmatist epistemology may not appear different from its social constructionist and critical inquiry counterparts in any significant way. However, a clear point of pragmatist departure from all preceding paradigms is its interpretation of the role of values in the research project. Taking the view that axiological assumptions precede ontological and epistemological propositions leads pragmatists to locate paradigmatic tensions in the purpose of research rather than its methods (Baert 2005). Accordingly, pragmatist thinking does not reject (post)-positivist methods if they are justified by acknowledged goals of prediction and control, and it accepts the legitimacy of social constructivist methods when the explicit aim of the research is interpretation. For this reason, pragmatism has proven one of the most tolerant perspectives with regard to multi-paradigm research, especially qualitative social research.

Pragmatism’s flexibility is primarily due to its emphasis on questioning the classical dichotomies dividing the preceding paradigms, and on seeking to close the gaps. As summarized by Wicks and Freeman (1998), with respect to the objective-subjective distinction, pragmatists acknowledge that there is reality outside the subject but that there is no such thing as objective access to it. Accordingly, facts and interpretations are
inseparable, and all scientific discourse is just another narrative, with its own language game rules. But this is not a completely relativistic, anything-goes kind of game – for, if we regard research activity as directed by the need to solve practical problems rather than by a contemplative desire to describe the world to ourselves, then we are able to apply a consistent, inter-subjectively determined, criterion for relevant knowledge. Contextually defined and constrained, this criterion is also liberating, in that it enables us to select from multiple paradigms valuable elements of research method and practice without being sidelined in irrelevant (in pragmatist parlance, useless) disputes.

In the context of organizational research, pragmatism can lead us to seek knowledge that is ‘useful in the sense of helping people to better cope with the world or to create better organizations’ (Wicks and Freeman 1998: 129). In this endeavour, epistemology and normative ethics of research go hand in hand. Multiple interpretations are not all indifferent or equal but pragmatically evaluated according to their relevance for given purposes established through social practice. Furthermore, pragmatism helps us distance ourselves more easily from our deeply ingrained conceptual frameworks – thus opening up new opportunities for avoiding undesirable self-fulfilling prophecies in socio-economic behaviour (for example), and for imagining and enacting alternative behaviours.

Given that many of the constituent terms of qualitative empirical studies of organization cannot be observed or measured, pragmatism may provide a legitimate and sufficiently effective alternative to truth-testing theories (McKelvey 2009). But, far from being anti-theory, pragmatism emphasizes the need for researchers to strengthen the connection
between theory and practice, in a praxeological approach that improves theory by elevating its relevance requirements. This approach is particularly important for organizational management scholarship, as it provides a more effective balance between flexible choice of multiple research methods and unifying research standards (Wicks and Freeman 1998). Encouraged by the integrating effects of pragmatist applications in organizational research, some organizational theorists explicitly use pragmatism to justify the use of multiple paradigms and thus put an end to ‘the paradigm wars’ (Goles and Hirschheim 2000: 260). It has been found that paradigm pluralism has had a beneficial, albeit indirect, effect on the advancement of qualitative organizational research – for, in increasing the variety of research methods applied, it has enriched the potential for novel, valuable organization and management ideas to emerge (Goles and Hirschheim 2000).

However, philosophical pragmatism has also had its fair share of criticism, on at least two accounts. First, due to its reliance on practical usefulness in epistemic evaluations, it has been accused of sliding into instrumentalist fallacies (Baert 2005), whereby emphasis on usefulness can lead to valuing means over ends, and to perverse effects such as having the intrinsic values of humanism succumb to technocratic priorities. We should also note that narrower views of what constitutes the practically relevant for a particular research community at a particular point in time may blind or bias thinkers against ideas ahead of their time. As history of humankind shows, great ideas may often prove to be out of sync with their time, so to speak, and only a disinterested, contemplative curiosity may be able to maintain a record of them, making it possible for their usefulness to be discovered much later, in unpredictable ways.
Second, pragmatism has been appraised by some philosophers as lacking in political sensitivity. While acknowledging that particular values and interests shape the research program of a particular community, it does not appear to be further refined to identify and question whose values and interests are actually being served – as a community experiencing a homogeneous or harmonious unity in this respect is difficult to imagine and even more difficult to obtain in practice. Due to an all-inclusiveness that encourages equality while glossing over power asymmetries that are pervasive in social settings (Hogan 2016), pragmatist research has been found wanting in the very humanism it professes, and thus yielding consequences that support the status quo. Noted in philosophy and social theory, these difficulties remain unresolved for organizational and management research as well – where they are particularly important, given the lack of humanism and the hegemonic influence of social-conservative ideologies still manifest in the study of organizations.

**A DILEMMA: PARADIGMATIC THINKING, OR FIRST-ORDER PHILOSOPHICAL REFLECTION?**

Having explored several influential paradigms in qualitative organizational research, it is time we question the very idea of relying on already theorized paradigms as a substitute for independent philosophical reflection on our own research practice. Perhaps the qualitative organizational researcher, true to the fundamental role of reflexivity in their work, should beware of the stereotyping and reductionism that may result from adopting paradigmatic sets of philosophical assumptions based on historical-
authoritative rather than self-reflective criteria. While some logical limitations can be identified in particular contexts, for most combinatorial associations or exclusions a significant exception can be expected. For example, it has often been assumed that a (post)-positivist ontology can hardly provide logical support for a social constructionist epistemology. However, precisely in organizational research, Borges et al. (2016) show that the two assumptions can function productively together, if understood in dialectical relation.

A return to individual philosophical premises and to personalized, independently achieved foundational coherence in one’s qualitative research program is even more important in organization studies, where not only single paradigms but entire paradigm taxonomies have routinely been adopted as proxies for philosophical-theoretical documentation and justification of empirical studies. One such example is Burrell and Morgan’s (1979) general classification of paradigms of social research, along two axes (namely, objectivity – subjectivity; and regulation – radical change), into four categories: functionalism, interpretive paradigm, radical humanism, and radical structuralism. Out of the two axes, only one (objective versus subjective) pertains to philosophy as such – and it conflates ontology and epistemology without much explanation. The other (regulation versus radical change) belongs to the narrower, applied domain of social order theory. A nuanced evaluation of the benefits and limits of Burrell and Morgan’s taxonomy is offered by Scherer and Patzer (2008).

One of the most widely applied paradigm classifications in organizational research, often used in field mapping exercises (see, for example, Grant and Perren 2002, or
Goles and Hirschheim 2000), Burrell and Morgan’s (1979) taxonomy has produced innovative contributions to management and organization theory in the context of encouraging multi-paradigm supported theory building and empirical research (see Gioia and Pitre 1990; Hassard 1991). However, it has also led to reductionist thinking, particularly in empirical studies. To address this problem, Deetz (1996) proposes that we should seek a deeper understanding of normative, interpretive, critical and dialogical studies in terms of the nature of their discourse.

We note that, when paradigm classifications are applied uncritically, no further opportunity is taken to deepen reflection on the diversity and nuances of the philosophical assumptions involved. In fact, what are discussed are not individual philosophical assumptions but broad paradigmatic labels that facilitate grouping theories and (rather forcibly) articulating them with particular sets of generalizations.

To overcome this difficulty, when exploring philosophical approaches relevant to specific directions and subfields, some organizational researchers have referred back to the basics of philosophical assumptions rather than uncritically adopting popular paradigm classifications. A good example of this is approach is Poole et al.’s (2000) own typology for research approaches in organisational change. Also, in an effort to address themselves in a relevant way to management practitioner-researchers, Gill and Johnson (2010) start from individual philosophical assumptions to illustrate the building blocks of the research process and the implications of adopting different assumptions. In this manner, they outline the discrete philosophical foundations of grounded theory, methodological monism, nomothetic and ideographic methods, and key philosophical
debates and disputes in interpretive analysis. Similarly, a good discussion of philosophical (especially praxeological) premises in qualitative organizational leadership research is provided by Klenke (2014).

**THE FUTURE OF QUALITATIVE ORGANIZATIONAL RESEARCH: CHALLENGES AND OPPORTUNITIES**

Qualitative organizational research shares with other social science fields several concerns, such as: balancing the need to maintain explanatory power with sensitivity to an increasing diversity and complexity of social phenomena; articulating recognizable standards for qualitative research (despite the open plurality of methodological possibilities); and establishing areas of commensurability across different qualitative approaches (Spencer *et al.* 2014). Most of these challenges are related to ontological and epistemological assumptions. But there are also axiological (mainly, ethical) and praxeological challenges that are specific to the study of organizations, at least when considering its past and present. Therefore, a key question that must be raised at this point is: what should be the *purpose* of qualitative organizational research as *purposeful* human action? Or, to put it in political terms, how should qualitative organizational research be legitimized as social (and not just intellectual) practice?

Given the long history of instrumentalist research in the organization and management fields, which has led to uncritical performativity (Fournier and Grey 2000; Wickert and Schaefer 2015), emphasis on the values of *humanism* and *responsibility* as intrinsic to any qualitative inquiry becomes paramount. In embracing humanism, however,
qualitative organizational research should be responsive to less dominant voices and contribute to their empowerment. As a whole field, it should take on, for instance, the challenge of postcolonial critique and be more open to non-Western philosophical assumptions and research methodologies. An interesting example of such an endeavour is the application of Eastern philosophy to research in strategy and management undertaken by Li (2012), who discusses Eastern Philosophy by taking an alternative approach to the very basic understanding of what constitutes a philosophical assumption. This approach, in turn, leads to innovative insights into how qualitative research could be conducted differently in the fields of strategy and management.

In conclusion, qualitative organizational researchers need to reflect more deeply on the ways in which they use philosophy and theory to formulate and support their empirical research questions – so that they seek to contribute to knowledge more meaningfully, through problematization and challenging foundational assumptions rather than through literature gap spotting practices that reinforce established theoretical views (Alvesson and Sandberg 2011). In advancing research open to humanist priorities and self-knowledge, qualitative organization and management scholarship should aspire to the epistemic standards and ethical values of a political philosophy of human action.

REFERENCES


