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91

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A Situated Discussion of 'Truth and Method' in Interpretive Information Systems Research”**

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LIVED METHODOLOGY: A SITUATED DISCUSSION OF 'TRUTH AND METHOD' IN INTERPRETIVE INFORMATION SYSTEMS RESEARCH

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Abstract

While interpretive information systems researchers are quick to reject normative accounts of managerial work in organisations, they have ignored a similar tendency in the research methodologies that they themselves present. By turning interpretive principles upon the IS field itself, this paper suggests that the prevailing norms and politics in IS interpretive research are obscuring the potential contribution of distributed, situated methodological knowledge. Furthermore, the emphasis on decontextualised axiomatic methodological principles tends to neutralise important issues about one's role as a researcher, the status and nature of one's research contribution, and the way in which both intervene in the world. The paper introduces the term 'lived methodology', inspired by work of Hans-Georg Gadamer, to explore this proposition and encourage researchers to colonise the philosophical middle ground of interpretivism in order to promote an academically grounded moral-practical dimension in their work.

Keywords: information systems, interpretive, research methodology, situated, hermeneutic, rigour, relevance.

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Introduction

The intention of this paper is to use interpretive principles to explore research methodology theory and practice in the field of information systems. It is presented in response to a call from Markus and Lee (1999) to go beyond the stale methodological 'tennis' that has been played in the past by competing factions within the information systems (IS) field, and seriously engage in further development of 'intensive' forms of research. They suggest that:

'It is not enough simply to present methodological rules in a textbook-like fashion... Methodologies in themselves, like algebraic symbols, are formalisms, devoid of empirical content. Shared examples of the empirical application of methods are essential for establishing how formalisms (whether intensive or extensive, positivist or interpretive) apply.

(Markus and Lee 1999)

It is suggested that as members of a 'community of scholars' we may have dampened our experiences and settled for reverse engineered, sanitised methodologies, rather than run the risk that our colleagues might deny us legitimacy on the grounds of either 'method' or 'truth'. As Weick (1983) points out in a paper on educational administration, academics are prone to a dialectic that threatens to limit their potential for development. Both

‘community’ and ‘scholarship’ are needed for a *community of scholars* to thrive; however, although ‘community’ can be supportive it can also endanger scholarship, while ‘scholarship’, by asserting its originality, prevents community. IS researchers need to find a balance between the need for community and the need for scholarship, thereby releasing situated, distributed, interpretive fieldwork research experience into print so that others can benefit from it. As Van Maanen says:

‘From examples of novel practices can come individual and collective experiments...By trying to write like everyone else (and not talking about it in public), we not only bore ourselves to tears but restrict the range of our inquiries and speculations...’

(Van Maanen 1995)

The discussion that follows is not presented as exemplary, indeed many of the illustrations either *could not* be imitated because they are by definition highly situated, or *would not* be since they are often less than satisfactory, rather self-conscious engagements. Instead, the confessional style (Behar 1996; Schultze 1999) adopted creates a window for the reader into certain research experiences for the purposes of reflection, and with the aim of stimulating further responses that continue the ‘conversation’ (Van Maanen 1995) about interpretive form in a constructive way. Although it is possible to approach these ‘shared examples of the empirical application of method’ in a variety of ways, they gently rest in a theoretical context that it is hoped will be provocative and present an alternative perspective on current issues in the IS field.

The paper introduces the term 'lived methodology', inspired by work of Hans-Georg Gadamer, to explore this proposition and encourage researchers to colonise the philosophical middle ground of interpretivism in order to promote an academically grounded moral-practical dimension in their work. Drawing upon the work of Roy Bhaskar (1987, 1999), a path is forged through a philosophical quagmire to illuminate the importance of being mindful of methodology hand-in-hand with practical research experience, and reinforce the responsibility that falls to researchers as they 'author' findings. In the process of constructing this position, issues relating to design, conduct and analysis in IS research methodology will be explored. A particular interest is taken in qualitative fieldwork and case study processes, since these are the most common ways of conducting interpretive IS research and the one most familiar to the author.

The paper begins with a brief introduction followed by a second section in which key terms and concepts used in the paper are presented and put into theoretical context. In the third section, a cameo case study is presented in order to illuminate some of the issues discussed in the following three sections, which focus on processes of 'design', 'conduct' and 'analysis' in interpretive case study based IS research. The final section of the paper is a conclusion in which the significance of the line of argument presented is discussed, and further ways in which the interpretive knowledge base within IS research could be developed are suggested.

Turning interpretive principles on the IS field:

Key terms and concepts involved

So, what is interpretivism and how can this perspective contribute an understanding of current methodological issues in the IS field? At its most straightforward the key tenet is that we *all* interpret the world. Lived reality is constructed by social actors, and researchers that adopt an interpretive approach seek to understand the complex world of lived experience 'from the situated point of view of those who live in it' (Schwandt 1994). Turning interpretive principles upon the arena of IS research methodology requires acknowledging that researchers cannot extract themselves from processes of social construction. Researchers are themselves social actors interpreting the world, and *already involved* in others' construction of reality. The implication of this is that each academic appropriates or 'gives meaning to' a research methodology and continually interprets it in the world.

The term that is coined here to communicate a sense of the 'involved interpreter', and the fusion of practical and theoretical mindfulness discussed here is '*lived methodology*'. Underlying this is the notion that the interpretation of everyday situations, and the decisions taken in the course of practical fieldwork 'on the ground', can have profound implications for subsequent contribution of one's research and vice versa. This term was inspired by a philosophical theory of interpretation developed by Hans-Georg Gadamer. In 1975, Gadamer published *Truth and Method*, one of the most important works this century on the philosophy of humanistic studies (Wiensheimer and Marshall 1975), and highly influential upon interpretive researchers. He proposes a theory of interpretation,

or 'hermeneutic' as an alternative to traditional positivist science methods of investigating the world. There are three major aspects of Gadamer's (1975) thesis; firstly, when a human agent encounters a phenomenon they go through a process of *appropriation* whereby they construct an interpretation of it. Secondly, all interpretations are based upon an individual's past experience, perception of the present and projection of the future; these form *prejudice*, which Gadamer regards as pre-learning rather than an innately negative form of bias. Finally, Gadamer suggests that only part of *lived experience* can be separated out, objectified and studied under a 'microscope' using formal scientific method. He urges researchers to defend and investigate further understanding connected to modes of experience that lie outside science.

One way in which Gadamer explains the distinction between perceptions of truth and method in science and human-centred inquiry is by asking the reader to consider the difference in their 'experience' of art versus the 'theory' of art. When one encounters a work of art one understands it as part of holistic, lived experience and this understanding is an intensely situated process. So, whilst Gadamer is dedicated to seeking out 'knowledge' and 'truth', he asks us to consider the whole of our understanding – or in his terminology our *total hermeneutic* – rather than the slice of it that can be verified by science. It is this last point that fuelled the construction of the term 'lived methodology' for the purposes of this paper. The interpretive IS research community has to resist the tendency to render methodology into an overly formalised 'science of method', thus limiting understanding to a narrow shaft of stark objectivity, and betraying interpretivism's priority of *understanding* before fixation with methodology. If

interpretive IS research bounds itself to 'methodological theoretic' the Weberian negative illusion of the researcher as a 'disinterested theorist' moving undetected in a calculated, perfectly plotted linear route through uncomplicated and compliant social, economic and political worlds will be reinforced. It is proposed that 'a more active, sense-making image' needs to be adopted to support researchers 'as interpreters and enactors of a stream of events' in their human ecology (Boland, Tenkasi, Te'eni 1994; Weick 1979). So why might interpretive researchers who, by their own volition advocate a position that conceptualises them as social actors 'already involved' in the world consciously or unconsciously obscure our view of 'lived methodology'?

It is suggested that the distributed, situated dimension is side-stepped for a variety of reasons, not least of which is its tendency to reveal the 'messy' nature of the research process, generating uneasiness on many levels. This 'messiness' threatens to undermine the researcher's efforts to convince others that their findings are arrived at in a professional and legitimate way. Indeed, some researchers feel compelled to present their methodology as a kind of 'high interpretive science' accompanied by tones of sovereign status; this researcher is the exception, unlike the rest of us struggling away in our chaotic lives, they have a direct line through confusion to objectivity. Others bring a significant amount of 'positivist baggage', and belief in the 'disinterested theorist', with them when they graft their interests to the interpretive 'bandwagon'. From a pragmatic perspective these responses are understandable in a political context where positivist methodology dominates, and interpretive researchers want to be published and get a job. It is suggested that the struggle between presenting themselves as *involved* in the research

situation, or *detached* from it, reflects many of the inherent ontological tensions and epistemological insecurities that lurk in the interpretive tradition. Thus we wrestle with the paradox of how to develop ‘an objective interpretive science of subjective human experience’ (Schwandt 1994).

If one scratches the surface of this uncomfortable paradox, vintage philosophical debates are exhumed. For example, to what extent is there a world that exists beyond the self, and how does this influence what we believe to be the basis for valid knowledge? On what basis does the researcher construct an analysis if she considers all interpretations equally valid? Historically, key interpretive IS work has tended to focus on interpretivism as ‘a set of epistemological assumptions’ that emphasise the social construction of reality, for example, Orlikowski and Baroudi (1991) and Walsham (1993). Ontology, or the metaphysics of ‘being’, has been largely neglected by the IS interpretivists, who tend to associate it with realist claims of traditional scientists. Walsham (1993) maintains that ‘there is no objective reality’, even though the use of structuration and actor network theory in his work are decidedly blurred on this issue, juxtaposing inner and outer structures and shifting boundaries of intentionality. In focusing on epistemology rather than its tension with ontology, IS researchers can scope the philosophical issues discussed, and concentrate on the political process of establishing interpretivism within the field including some limited bridge building (Lee 1991; Gable 1994). The relationship between ontology and epistemology is complex and interconnected, but it is suggested that an equally political and, indeed, ethical debate surrounds the understanding of ontology developed by a researcher.

The two poles of this debate are as follows, if reality is a thoroughly subjective construct then the ego could sit supreme and bend situations to its will. However, as a somewhat cynical Sokal suggested, those who believe this should try throwing themselves off a tall building to find out if it is a sensible stance. Moreover, certain forms of relativism, where all interpretations are equal, can lead to apathy; who am I to say that one person's interpretation of events is not as valid as mine? Whilst a belief in extreme social constructivism and total subjectivity may be adequate for a utopian society where power asymmetries do not exist, it is not sustainable in contemporary society where we have been cursed with 'interesting times'. The opposite pole is equally problematic with philosopher-scientists like O. Wilson eagerly anticipating the progress of a genome project that will allow us to find the essential object, a gene, that controls obesity, depression and criminality. Such a view scopes out human will and agency, relieves us of responsibility for controlling our own actions or influencing that of others.

There is an extent to which this debate will never be solved, and this paper has the more modest aim of raising an awareness, which may generate consciousness of an obligation and responsibility for our involvement in the 'real' world. Current philosophical thought maintains that each generation offers its own working ontological model for critique, for example five hundred years ago the 'flat earth' was established reality, today it is not (Bhaskar 1979). It is proposed that in contemporary society, the 'runaway world' as Giddens (1999) calls it, demands a subtle, critical ontological position. This will be

represented here as an appropriation of the work of Bhaskar (1979), Beck (1992) and Harraway (1991).

A belief in a *subtle, limited realism* reaffirms our mortality; in other words the physical world will still exist after an individual's death (Harraway 1991). It also confirms that we are not in control of the world, we just live in it, a stance which supports an important and timely ecological sensitivity (Harraway 1991). Although reality does not change, our understanding of it does, and in this respect our ontology is both temporally and spatially situated (Bhaskar 1979). The boundaries between objectivity and subjectivity can be used as an important resource, altering our perspective and generating critical debate. Bhaskar (1979), Harraway (1991) and Beck (1992) approach the issue from different angles but all support a limited realism, arrived at via due consideration of multiple perspectives (including social and natural sciences), that enables critical, constructive intervention in the key debates taking place in contemporary society.

Science has played an important role in advancing our understanding of the physical world in which we live (Beck 1992). However, humans are not wholly objective beings and our subjective beliefs have a profound influence over our interaction with the physical world. For example, a woman is a physical entity, but each individual has their own understanding of what it means to be a woman and different human societies have sets of inter-subjective beliefs about her position and role (Harraway 1991). It is suggested that we need both scientific methodology *and* human centred inquiry in order to advance our understanding; in other words, approaches that respectively prioritise

objectivity and subjectivity, but remain mindful of each other (Beck 1992; Harraway 1991). Scientists cannot justify their endeavours solely for ‘science sake’ as we have witnessed with human cloning and genetically modified food (Beck 1992). However, unless at some stage we maintain that there is a relatively stable reality beyond our ego (Bhaskar 1979), it may be difficult to summon up the motivation for responsible intervention. The ontological stance articulated above is presented as a ‘sign of the times’, and it is suggested that these times demand that a proportion of our research adopt an academically grounded, moral-practical approach. As Ulrich Beck (1992) suggests, living on the planet at the turn of the millennium is like being on a runaway train; we have a choice, either sit and watch as we hurtle towards who knows what, or try to work out where we are going and influence its direction.

Principles of interpretivism	Implications for understanding IS research methodology
Everyone interprets the world	An academic appropriates a research methodology and continually interprets it in the world
Lived reality is constructed by social actors	Researchers are themselves social actors interpreting the world, and already involved in others’ construction of reality
Understanding the world from the situated point of view of those who live in it	A notion of ‘lived methodology’ may develop understanding of situated research processes and develop the knowledge base of interpretive IS researchers
The researcher is already involved in the world	The researcher cannot extract themselves from the world that they are studying and must take responsibility for their intervention

Table 1: Summary of main points presented in this section

A cameo case study to accent a situated discussion of methodological issues in interpretive information systems

Interpretivism's emphasis on lived experience, and understanding the world from the situated point of view of those who live in it, means that a monotonously abstract and theoretical discussion would not provide sufficient grounding or be convincing. Therefore, evidence generated by actions 'taken in the context of particular concrete circumstances' (Suchman 1987) is included to accent the discussion. There are very few studies that provide the kind of holistic methodological account that could be used in this way and so, at the risk of seeming self-referential, the author's own research experience will be used. There is some irony in decontextualising data from a case study for the purposes of a paper that intends to focus on fundamentally contextual issues. However, full-length version's of the case study are accessible (XXXX 1998) and more substantial details are available publicly (XXXX 1998a, 1999). The research project discussed is not presented as an exemplar; the evidence drawn from it is used to illuminate the kinds of situations, decisions and choices that emerge in the course of intensive research. It is offered as a 'window' into an interpretive fieldwork experience that reveals a dimension of the methodological process that would otherwise remain distributed and situated knowledge depriving information systems research of a potentially insightful material for development.

The data used in the discussion that follows is from a research thesis called *Computer-mediated Interpretations of Risk: The introduction of decisions support systems in a*

major UK retail bank conducted between 1993 and 1998. The research explores the complex consequences surrounding the introduction of a computer-based decision support system (DSS), called Lending Advisor, into middle market corporate lending processes. The major clearing bank in the case study, known for reasons of confidentiality as 'UK Bank', was the first to use DSS to implement contemporary IT-enabled approaches to portfolio risk management in the UK retail banking sector. The introduction of Lending Advisor (LA) evoked considerable industry interest, and other major retail banks have since developed similar computer-based DSS for their UK credit risk management divisions.

The research project adopted an interpretive approach to methodology, using qualitative methods to pursue a longitudinal case study. A case study site was identified during a preliminary round of interviews across a number of sectors, and access was negotiated with the project manager and approval from the project director. The primary method for gathering data was one hundred and forty semi-structured interviews conducted on-site with project 'stakeholders' (Poloudi and Whitley 1997), including a group of twenty LA users who were studied over a period of eighteen months. The fieldwork also involved attending residential Lending Advisor training courses, observation of everyday work practices, a review of internal organisational documentation and trade press, and some informal contact with past and present UK Bank. A set of basic interview questions was developed which covered a variety of issues. These were tailored for different stakeholders, but an emphasis on their understanding of the LA system and their perception of its role remained the same for each interview. Some mainly technical or

factual interviews were tape-recorded; otherwise, out of sensitivity to the high-level of job insecurity and in-house politics, notes were discretely taken. These were written up immediately after the interview. The project followed the implementation of Lending Advisor from pilot stage through to 'business-as-usual' status at which point talks began about the next version of the software. The fieldwork generated extensive data, which were analysed with a method derived from ethnography and the use of social theory.

The analysis process used in this study is best described using Evans-Pritchard's (1951) three-phase method developed during his ethnographic study of the Nuer in Africa. This method involves firstly, learning about the culture being studied; secondly, critically reflecting upon interactions observed and experienced; then finding a form through which to communicate these experiences to the wider research community. This method was complemented by the innovative use of social theory throughout the study. In the early phase of the research, the researcher was strongly influenced by Gadamer's (1975) particular approach to 'truth and method' and this informed the assumptions underlying the methodology. For example, it shifted the researcher's attention from decontextualised studies of decision-making and risk management techniques, which dominated previous literature, to focus on *situated* interpretations of Lending Advisor. It also provided theoretical justification for gathering multiple and often contradictory narratives about Lending Advisor, rather than trying to 'triangulate' and find one consistent account of events. During fieldwork, the tenets of 'social construction of technology' (Bijker, Hughes & Pinch 1987) helped guide and focus the study on a 'micro' methodological level, reminding the researcher that there is no inevitable

outcome to technological innovation. Later when organising data Bruno Latour's (1987) actor-network theory, which developed from the early debates on the social construction of technology, provided a helpful 'lens' through which one could construct various 'mid-level' abstractions highlighting socio-political issues.

Successive readings of the data helped the author group it into themes reflecting the importance that the interviewees placed upon certain issues, the frequency with which they arose, most startling contradictions in the data, and lateral connections that the researcher made during analysis. Certain of these themes were selected for further development based upon the nature of their contribution to the information systems field and political potential for the Ph.D. process. The thesis was eventually organised around four main themes: the strategic role of computer-based information systems in UK financial services; contemporary organisational change, particularly involving middle managers; the positioning of computer-based decision support systems vis-à-vis human expertise; and finally, the extension and development of Ulrich Beck's notion of a 'risk society'.

During an extensive reading of various literatures, the researcher found that the concept of risk had been considered at an abstract level by certain social theorists who had developed a thesis relating to the social construction of risk and identity in society. The projective sociological work of Ulrich Beck in *The Risk Society* (1992) highlighted important political, social and economic issues, which informed the analysis of situated decision-making and perceptions of risk in the human ecology. It was therefore decided

that the other theoretical vehicles, which had supported the research thus far, would be moved ‘backstage’ to methodology and the risk society would be brought forward as a set of propositions with which to organise the findings from the Lending Advisor research project. The dissertation set out to explore the light and shade in the landscape of a risk society; highlighting a dimension of analysis in the Lending Advisor study that might have been neglected by traditional IS research approaches, and contributing to areas where Beck’s original thesis left us demanding more.

Situated and distributed design decisions

Traditional research theoretic dictates, in a seemingly straightforward way, that one should ‘consider the nature of the problem studied before deciding which method to use’ (for example, Trow 1957). The primary concern of the researcher should be whether or not the problem, or phenomena, under study appear *vulnerable to analysis* using an interpretive approach. However, it is suggested that choices are very often bounded by factors out of the hands of the individual or individuals that they effect, and we therefore must make a distinction between ‘choices’ and ‘decisions’ (Giddens 1994). Choice may exist, but who takes decisions, and how, is fundamentally a matter of power (Giddens 1994). One of the motivations for this paper is to encourage scholars who are finding their ‘voice’ in an information systems community to actively explore their position since all choices, even by the apparently powerless, refract back upon pre-existing power relations (Giddens 1994; Walsham 1995a). If a researcher consciously examines their own abilities, discusses their opportunities in the light of local institutional biases with

those around them at various levels of power, and reads the IS research literature it will become apparent that their methodological decision may be shaped by people, place and timing.

As researchers our understanding of interpretivism forms part of the totality of our hermeneutic; it is not just a rational choice made in a vacuum, but given meaning in the context of our *prejudice* (Gadamer 1975) and our relationship to power relations around us. It is proposed that when a human agent encounters a phenomenon like interpretive methodology they go through a process of *appropriation*. They construct an interpretation of it based upon their own past experience, perception of the present and projection of the future. A researcher considers their own pre-learning and scrutinises their skill sets in order to assess whether or not she has the aptitude and enthusiasm for interpretive research. This situated self-reflection is part of the 'personal political', and may reveal opportunities and losses experienced in the course of one's life history. Furthermore, whilst one aims to make a reasoned and informed decision, it will still reflect tendencies within ourselves, as Martin Trow (1957) noted: 'Most researchers have their 'favourite research methods with which they are familiar and have some skill in using. And I suspect we mostly choose to investigate problems that seem vulnerable to attack through these methods'.

Orlikowski and Baroudi (1991) suggest that choice of research approach is also 'influenced to a greater or lesser extent by the various institutional contexts within which researchers are trained and work....They are heavily influenced by the doctoral program

attended, the agendas of powerful and respected mentors, the hiring, promotion and tenure criteria of employing institutions, the funding policies of agencies, the rules of access negotiated with research sites, and the publishing guidelines of academic journals'. Drawing upon the work of Bruno Latour (1987), Walsham (1995a) presents a further discussion on the influence of institutional norms, and the construction of stable communities of knowledge from the midst of historical methodological controversy in information systems research. His work reminds us that researchers engage with a methodology at a certain point in its development, and are influenced by the history of the tradition itself. In the case of interpretivism, it is important to note that from its inception it was a *reaction against* 'prescriptive views of culture' (Spender 1989), and sought to make the social world, and human inquiry, the central focus of research agendas. In the past, interpretive researchers have expended much intellectual energy explicating the differences in their work for the benefit of 'hostiles'. Interpretive research now has a much broader acceptance in the information systems community and it is suggested that, at this point in its development, effort would be more usefully focused on *constructively examining* the interpretive form rather than defending it.

The design phase of a research methodology provides the kind of 'back to the drawing board' opportunity that can be harnessed for the further development, discussion and debate of interpretivism. Interpretivism is the term used for a loosely coupled family of methodological and philosophical persuasions (Blumer 1954), or as Orlikowski and Baroudi (1991) put it, 'a set of epistemological assumptions'. They serve both as a *broad set of co-ordinates* with which the researcher can mark the *beginning* of an intellectual

journey, and they *steer* the interested reader in the *general direction* of a *particular kind* of inquiry (Schwandt 1994, my emphasis). In the processes of appropriating these broad assumptions researchers must interrogate and give meaning to them, for they are not neutral axiomatic principles.

Each person's interpretation of the assumptions underlying their research approach will have consequences: it will give them the eyes to see certain topics or questions and not others; it will influence the way that their research approach becomes enacted in practice; and will influence the status and nature of any contribution that they make. For example, if the researcher decides that interpretive principles can be combined with certain positivist methodological techniques they may then go out into the field with the aim of 'triangulating' to find a 'standard' account of events which scopes out inconsistencies. Whereas a research with stronger constructivist leanings might build upon contradictions in the data to reveal political narrative, and may resist the notion of reducing interview data to codes as the basis for a content analysis. The findings of the former researcher will tend to focus on statistical probabilities and factors, whereas the latter may choose a sociological analysis of themes. Part of this process of definition and shaping of purpose also needs to address 'classic' areas of philosophical congestion in interpretivism and this will be discussed next.

Every research approach has its strengths and limitations, which one has to learn to work with, but these can be mitigated to a certain extent if one manages them in a scholarly and thoughtful way throughout in the research processes. The controversial issues that

trouble interpretivism are the lack of critical purchase, its tendency toward relativism, solipsism and over-privileging the inquirer's perspective, the confusion between psychological/epistemological and, finally, the paradox of how to develop an objective interpretive science of subjective human experience (Schwandt 1994). All of these points need to be considered carefully when designing a research methodology, and their potential impact weighed for each situation. This paper encourages further discussion of the last point mentioned, not for the purpose of an epistemological repartee with positivists, but for the benefit of interpretive IS researchers who want to constructively explore into this issue. Although Benbasat and Weber (1996) maintain that 'contributions to substantive problems and theory in the IS discipline are to be valued more than contributions to some arcane aspect of research methodology', it is suggested that researchers need to be thoughtful about the philosophical assumptions underpinning their research since they can have profound implications for the end results. Therefore the issue of ontology/epistemology is re-introduced for discussion.

One of the aims of this paper is to suggest a route through the epistemological/ontological quagmire that supports researchers and encourages them to consider a moral/practical approach to their research. The motivation for this is a conviction that if, as interpretive principles suggest, the researcher is already involved in the world and cannot extract themselves from the world that they are studying, this carries with it a certain responsibility. Recent global discussions (Bhaskar et al 1999) confirm that there is no prospect of an ultimate solution to the object/subject debate in sight. Once one sobers up from the entertaining and intellectually lively interchange between extreme views, it

becomes apparent that neither polarity is sustainable as a *modus operandi* to guide our involvement in the world. Therefore one has to take a pragmatic decision for the times and conditions, act ‘as if’ it is the ‘truth’, and adopt a method for living that accommodates it.

The speed and scope of change in contemporary society is often bewildering, as we search for a way to live alongside phenomenon that are either new to us (electronic commerce, global group support systems), or redefined in a way that challenges our trust in them (expert systems in medicine, marketing or police work using massive databases). Maintaining that ‘there is not an objective reality’ (Walsham 1993) is too blunt an argument for the times that we live in, because although some will not let it prevent them from engaging, others may use it as justification for apathy. Presenting an ontological position to the world is the equivalent of saying ‘Trust me, act on it’ (Bhaskar 1999) and citizens of the ‘risk society’ (Beck 1992) have an intense need for this intervention. It is, therefore, proposed that a critical realism (Bhaskar 1987) be considered as part of IS researchers processes of appropriation and enactment of interpretive principles.

Critical realism offers an academic foundation from which to decide one’s stance on the current ‘rigor and relevancy’ debate in information systems research (see MISQ 1999, Vol. 23, No.1). Both of these terms wield considerable rhetorical power as they challenge the legitimate basis upon which research *should* be undertaken. Here lies the rub, the clamour for greater relevancy appears to be a little too much like a call for

researchers to emulate and accommodate the approach of those issuing it. Furthermore, as Lee (1999) suggests:

‘It is not enough for senior IS researchers to call for relevance in IS research. We must also call for an empirically grounded and rigorous understanding of relevance in the first place.’

It is proposed that our efforts to understand relevance, our research designs and intended interventions can come as much from a philosophical grounding, political consciousness and ethical belief, as concern about our ‘sales’ ratings with Business Week readers.

How does critical realism (Bhaskar 1987) manage the tension between object and subject, real world and ego? Bhaskar (1999) suggests that we should adopt an ontological stance in which the world is seen as structured, differentiated and changing. From this position, science is seen as ‘a process in motion attempting to capture ever deeper and more basic strata of a reality at any moment of time unknown to us and perhaps not even empirically manifest’ (Bhaskar 1999). From this fairly conventional starting point, Bhaskar then takes a radical departure from traditional realist views. He calls upon researchers to be critical of the nature of the reality that they have access to, in other words their understanding of ‘currently existing social and natural reality’. It is an unusual hybrid of commitments; traditionally, to insist that scientific knowledge is a cultural product went hand-in-hand with anti-realism but Bhaskar breaks this link, this is ‘realism, but with an edge’ (Baggini on Bhaskar 1999). It is suggested that this commitment to searching for and asserting one’s situated truth is indispensable for any notion of intentional action. If we cannot avoid being involved, then lets at least make it a politically thoughtful, ethical

intervention. Decisions taken in the early phases of research will set the tone for this and have profound implications for the nature and status of both research data and contribution. The choices that have been selected for discussion here are research funding, the negotiations surrounding terms of access, and feedback options.

Research designs are often vulnerable to practical and political issues; these can either be perceived as negative *risks* threatening an 'ideal' research design, or positive *opportunities* for intervention and management. Part of the research design process involves thinking through the implications of the various funding options, how this will influence the outcome of the research, and the extent to which the researcher can manage this situation by thinking through how they are going to present themselves to the participants. Interpretive IS research can accommodate various dynamic relationships with a field-site in a spectrum from "independent observer" to "action researcher" (Walsham and Sahay 1999). At the beginning of the Lending Advisor research a decision was taken to remain 'independent' and, as far as possible, to try 'bracket' the research processes from the field-site so that the presence of the researcher did not significantly influence events under study. No formal presentations or recommendations were asked for in the terms of access and none were given in the early phase of the research. However, as understanding of the research context deepened, both by gathering further research data and linking local events to global trends using social theory, it became apparent that the researcher would have to make a further ethical/political decision regarding her role. For example, it was particularly confronting to witness the process of attrition among middle managers many of whom could not adjust to the

intense rationalisation involved in UK Bank's re-organisation. During the two years spent documenting the experiences of local branch managers with Lending Advisor, over half of the group had to cope with early retirement or redundancy.

In the final round of Lending Advisor research interviews limited feedback was given to the interviewees based upon a sense of ethical obligation for the time that these individuals had given to the research process, and a respect for the considerable stress and pressure that they were experiencing. The 'breakdown' (Heidegger 1962) in allegiance to methodological ideals can be seen as a weakness in the original research design, or indeed the researcher, however it opened up a 'two-way street' with research participants and these later interviews generated distinctive data which was later used as evidence for the 'risk society' analysis. Similar ethical/political concerns have recently been voiced in other interpretive studies, for example Schultze (1999). Walsham and Sahay (1999) note their experience of this aspect of lived methodology as follows:

'...we felt a particular moral imperative to get involved in advising on possible courses of action in a context such as Indian district-level administration. A refusal to offer ideas and constructive suggestions would reflect a lack of concern for the people in Indian districts, whose economic prosperity is among the lowest in the world.'

(Walsham and Sahay 1999)

This discussion does not present any solutions or prescriptions on these issues, but attempts to highlight a change in the climate surrounding the academy and its relationship with contemporary society. The intention is to offer an alternative perspective on the

current rigor/relevancy debate (see *MIS Quarterly* 1999) in the information systems field, and to stimulate debate. The last point in the discussion above moved from design to revision of design, and the next section will pursue this by exploring issues relating to the 'conduct' of interpretive research.

Conducting fieldwork: The management of 'politics on the ground'

It is during the conduct of fieldwork that the strongest disillusionment with methodology theoretic is often felt. Abstract interpretive principles intensify into experience, and we are confronted by the dilemmas of *lived methodology*: the particular people, places and times that promise to condition the practice of one's IS research methodology. Interpretive researchers enthusiastically reject normative prescriptions of managerial work in organisations, but by smoothing over the problems, inconsistencies and contradictions that characterise experiences in the field, they fail to apply the same critical skills to descriptions of their own work processes. Klein and Myers (1999) maintain that although interaction between the researcher and the research subjects is fully acknowledged by interpretive principles, it is the one least well discussed in the literature. It is our responsibility to construct accessible accounts detailing the way that we handle the messiness of everyday life, and how we decide to narrate and make sense of our data. Greater methodological openness, or frankness, would not only reflect a growing self-confidence among IS researchers it would support further development and understanding of interpretive research approaches at multiple levels. Firstly, it would encourage researchers to be self-critical and interrogate their methodological processes.

Explicit consideration of the way in which their responses to challenges in the field influenced both the status and nature of their research would push individuals into self-reflection and potentially deepen their own learning. Secondly, availability of such accounts for the 'consultable record' (Geertz 1973) would enable the development of a community knowledge base to support and inform the progress of researchers conducting field-based studies for the first time. Lastly the information systems community would be able to form better understanding of the *kind of contribution* that interpretive research can make.

Constructing a thoughtful and theoretically informed research plan is important, but the quality of its *active management in practice* is more so. The characteristic that separates interpretive academic studies from journalism or novel writing is dedication to *systematic* research methods and presentation, which is why the tension between plans and actions has to be handled so carefully. The management approach proposed for fieldwork needs to be informed by a particular understanding of what a plan is and how it serves us. The seminal work of Lucy Suchman (1987) on this topic is helpful here:

'Our actions, while systematic, are never planned in the strong sense that cognitive science would have it... It is only when pressed to account for the rationality of our actions, given the biases of European culture, that we invoke the guidance of a plan... Reconstructed in retrospect, plans systematically filter out precisely the particularity of detail that characterizes situated actions, in favor of those aspects of the action that can be seen to accord with the plan.'

Suchman (1987)

Information systems research methodologies have tended to suffer from the bias described by Suchman in the above quotation. Conversations with researchers suggest that most feel a compulsion to ‘reverse engineer’ or sanitise their methodology to live up to hegemonic criteria. It is suggested that this has denuded the IS field of the benefits from distributed, situated expertise accumulated by the diaspora of interpretive researchers who navigate their way through research process using a combination of plans and improvisation. Field research is dynamic, and demands both *intuition* and *improvisation*: the Trukese sailors in Suchman’s (1987) famous account don’t just give up with the first unexpected turn of the tide, they adapt and adjust until they are back on course. Similarly, one cannot be blown by the wind of adversity in fieldwork situations, but must remain *open to revision* (Gadamer 1975), engage with each situation with tenacity, find a way to continue with the research, and discuss the authentic experience in academic form. Some of the most difficult challenges in fieldwork situations are political and ethical.

The discussion surrounding institutional power relations, funding, access and feedback suggested the importance of internalising interpretive principles and realising that one is *already involved* in politics and ethics. This section illuminates these points further by drawing the reader’s attention to a level of political and ethical reflexivity that is seldom mentioned in the literature and through detailed examples of interview situations during the Lending Advisor research project.

The first situation emerged as a side effect of circumstances surrounding access to the organisation chosen as field-site for the research project, UK Bank. UK Bank was one of a number of organisations in various sectors visited during an exploratory phase of the doctoral research. The researcher's father had been an employee of UK Bank for 40 years and had contacted a former colleague, who used the internal directory to identify an appropriate point of contact within the central information technology (IT) department. This was passed to the researcher who then arranged a day of interviews with UK Bank personnel involved in a variety of IT projects, one of which was Lending Advisor. This experience of gaining preliminary access via 'friends of friends' will no doubt sound familiar to others, not just with regard to fieldwork opportunities, but many kinds of networking processes.

Indeed, it can be most helpful to know people familiar with the fieldwork situation who can provide insight into the 'form of life' under study. For example, I knew that bank managers spend at least 50% of their time interviewing customers, listening to their business cases and asking relevant questions. The research interviews reversed this dynamic therefore I was aware that it would be important to put the interviewees at their ease with this process. Relatively few of the middle managers interviewed had any higher education and, therefore, one had to temper the use of the university prestige legitimating my presence with any self-consciousness on their side. When the research began British retail banks were still very traditional, cathedral-like places and one had to take extra care to be punctual and dress formally (skirted-suit, white shirt, briefcase,

conference pad) in order to conform to the 'front stage' (Goffman 1956) image of bank culture.

Further 'back stage' (Goffman 1956) preparation involved studying culturally specific language and terminology, taking care to use terms correctly (as far as possible for a non-banker). If asked about any associations with retail banking, the family connection would be discreetly mentioned. In many instances this tended to identify the researcher as a 'quasi-insider' (Woolgar 1988) with some of the interviewees. Upon examining the data, it was felt that this influenced its nature to a certain extent, generating a form of trust that may not have otherwise been part of the dynamic. In addition to this, during some of the interviews with the middle managers within UK Bank, a gender-based power dynamic emerged. This last point will be discussed a little further as it raises consciousness about the way in which micro incidents and inflections during the conduct of research reflect broader social power relations.

In most of the research interviews the interviewee had *not* known my father personally; however, it would seem that just the awareness that I was a daughter of an ex-bank manager would engender a certain father/daughter dynamic. It tended to surface mostly with the mature managers, particularly those in the XXXX region where my father used to work. These manager would perhaps begin sentences with comments like 'You are too young to remember this, but your father would'. The father/daughter dynamic may have provided some managers with a mental slot in which to put me, since I was not a customer, or a friend or family, and was perhaps too young and female to be an ivy

league academic (!). Yet here I was paying them attention and interested in their life experiences. The second, and perhaps most important, aspect of this interaction was that it revealed that status and experience were very important to these individuals and certain, quite macho, 'masculinities' (Knights and Murray 1994) were attached to their work identity. For example, this was shown by the quite frequent use of war metaphor (Knights and Murray 1994) in their language when talking about cases of conflict at work. The 'low volume' father/daughter sub-text was mildly irritating, however it gave me unique insight into the 'soft underbelly' of the manager's lives. Most managers did not indulge so obviously in this gender play, but there was a tendency to treat me as 'part of the extended family' in some cultural sense.

A retrospective reflection on this dynamic inspires many thoughts, but there are two that seem most interesting to a wider audience. Some kind of power relationship is inevitable in any kind of social interaction. It may be that I was sensitised to this particular dynamic within UK Bank because my father regularly confronted sexism in the bank culture. My background provided me with an immensely valuable stock of cultural know-how in terms of language, norms, values and beliefs. However, I was also aware that my appreciation and first hand experience of the 'local' may have made me empathetic to the bank manager's plight, and I remember consciously pushing myself to see other perspectives. This was made easier by the realisation that, in common with most bank managers, whilst I was concerned to see aspects of local knowledge devalued, I was very glad to see some of the traditional hierarchy and behaviour swept away during this period. It should be emphasised that these gender-based power dynamics were not the

defining characteristic of the interviews nor were the managers aggressive towards me, on the contrary they were very courteous, generous with their time and could not have been more helpful. However, these subtle gender-based power ‘inflections’ highlight more general social norms that are rarely commented on in the research process. One of the interesting aspects of conducting a longitudinal study is that these reflections develop over time and provide insight into the norms, values and beliefs in a particular culture. The example above highlights the way in which boundaries between the personal and the professional shift under certain conditions to reveal the way in which we are *already involved* in the research situation. The next example reveals a further set of political and ethical dynamics at work, this time between the researcher and her academic institutions, represented in this case by a Ph.D. supervisor.

A few of the second round of interviews that were undertaken for this research were conducted with the researcher's Ph.D. supervisor, Professor “X”. It was found that the presence of a different sex interviewer with higher status would subtly change the way that the interviewees narrated their experiences. Professor “X”’s presence, and the shift in narrative that it tended to produce, had both positive and negative implications for the research process. Since he was not as immersed in the case study process as I was, Professor “X” inevitably didn’t give the same kind of attention to cultural detail, for example: he didn’t wear the dark suits and white shirts; didn’t know as much culturally specific language; and had to trade off his own time pressure versus the interviewee’s priorities (we were sometimes late arriving at the interview site). Professor “X”’s ‘front stage’ (Goffman 1956) persona was very much the ‘Ivy League’ academic and this

'otherness' contrasted with my strategy of 'chameleon ethnographer'. His presence lent a certain legitimacy to the interaction which, in some instances, made interviewees take the research process more seriously. However, in a few cases, interviewees subtly indicated that they thought that I was being 'examined' and tried to make me 'look good' or to 'back me up' in the interview in an almost conspiratorial way. The majority tended to sustain eye contact with Professor "X" rather than myself during the interview. The interviews conducted with Professor "X" tended to be less structured, since with three people in the interview I did not have as much opportunity to 'steer' the discussion with my own questions. Further, whereas I would tend to let the interviewee do most of the talking, Professor "X" would offer his own views, perhaps taking a historical view of a topic based on his many years of experience in IS research. Since Professor "X" had conducted extensive field research in other countries and in other sectors, he could reflect on how issues had changed over time, or how transformations in the nature of work in other sectors related to banking. The interviewees usually found this interesting, but I was conscious that it resembled their 'normal' work dynamic where they listened and assessed the value of the person talking.

On the more positive side, I was presented with an opportunity to hear Professor "X" question the views of the interviewees and raise issues with them, which I tended not to do. During the interview I had more time to reflect and make notes which was otherwise challenging when trying to manage the interaction on my own. Although I did feel that I lost control of the situation at some points, I always left these joint interviews feeling that I had achieved my research objectives. When I went back again to visit a manager that

had been interviewed by Professor “X” and I, they would always say how impressed they were with him and comment on the interesting points that he had made. From comments that the interviewees made, it appeared that Professor “X” had become fuel for their dinner party/pub conversations and reflections. In an example of the inevitable ‘slippage’ between the worlds of interviewer and interviewee, some of the subsequent narratives would be partially contextualised within Professor “X”’s language. I balanced out my concern about the different dynamic and data with the valuable input that Professor “X” was able to give me as a result of his increased familiarity with the case study. The most significant point about these joint interviews was that the interviewees tended to tell less anecdotes about their family or personal life, and put more emphasis on their expertise and business processes. Colleagues (especially female colleagues) have asked me if I was disappointed not to have had more of this business focus in the interviews that I conducted on my own. My answer to this is two-fold. Firstly, whilst I have emphasised these subtle differences in interview content for the purposes of this methodological ‘confessional’ (Van Manen 1995; Schultze 1999), they were subtle and did not significantly undermine the research process. My case study is testimony to the extensive data that I gathered on business process and expertise. Secondly, my hermeneutically informed approach meant that I was not just interested in the *techniques* that these individual’s used in their everyday work practices, I was researching how they *made sense* of Lending Advisor. How did these managers come to understand and experience Lending Advisor in the context of their lives? My research data reached beyond an isolated cognitive theory of decisions involving financial credit risk to ask how managers interpreted this transformation in work practices within a situated, cultural and *holistic*

hermeneutic. I had the opportunity to witness a group of LA users cope with and manage significant shifts in personal and professional risk in an organisational context of dynamic transformation.

On a more controversial note, but in acknowledgement of the pervasive nature of societal power relations, I was conscious that attending Ph.D. field research interviews was one way that a supervisor could gather industry data for his or her own research. Many Ph.D. students experience a trade off between supervision and revision of their research by the academic that they work with in an institution. In the UK, academics do not receive any additional payment for the supervision of doctoral students, which may help to explain the considerable variation in practice; Ph.D. supervision is regarded as a ‘privilege’ and ‘part of the job’ in many institutions. The introduction of research assessment exercises has heightened the pressure for academics to publish; in the UK this is taking place in the context of continually increasing student numbers and steadily decreasing public funding. The ethics of the Ph.D. supervision process are a major grey area in academic life and most doctoral students recognise that they are required to ‘pay their due’ by allowing their data to form the basis of publications by their supervisor in return for supervision. The more fortunate Ph.D. students feel that working with a supervisor enriches their own research process. The balance between exploitation and mutual benefit needs to be managed by both parties, voicing concerns if they have them and regularly negotiating these sensitive boundaries. This was certainly the experience of the supervisor/student relationship during this Ph.D. research. The commitment to understanding and challenging traditional power relations between colleagues in hierarchical academic

institutions by both Professor “X” and myself has been an important motive for making the reader privy to these methodological reflections. For these reasons, it was decided to take the unusual step of forcing some transparency in the power relations between the doctoral student and their supervisor.

Detailed accounts of one’s involvement in the research context will inevitably reveal situations in which the researcher has had to manage politics ‘on the ground’, and make decisions about the nature and status of the data that they are gathering. This undermines any intention they might have had to ‘sanitise’ their political and ethical position as a social actor. Even when researchers decide not to intervene, they have already done so just by their presence. As Klein and Myers (1999) note, data does not just sit there waiting to be gathered, ‘like rocks on the seashore’. It is important for researchers to consider the implications of their research interactions, including their ‘mistakes’ (Schultze 1999), since the way that one responds has a ‘ripple’ (Ely, Vinz, Downing, Anzul 1999) effect throughout the research ecology. This, in turn, shapes the nature of the data gathered and the kind of analyses that it can support, a consequence that is ‘not acknowledged or analyzed’ (Klein and Myers 1999) in interpretive IS literature. One brief example will be presented to close this discussion, and it relates to the importance that longitudinal case study designs put on the systematic data gathering over time and the vigilance that this demands. In the Lending Advisor case I became increasingly conscious that the interviews being conducted were time critical. LA was a leading edge information system in an industry experiencing extensive transformation, and I had noticed that the interviewees’ narratives were temporally contingent and shifted over

time. It was therefore frustrating when requests for interviews were buried by participants, or were rescheduled multiple times. Whilst on the one hand it is important not to disaffect the interviewees by ‘nagging’, there are also times when it is necessary to ‘jog’ their memories. In retrospect, I may have been too cautious of my status and overly reticent about ‘chasing’ an interview. As a consequence I felt that I failed to gather certain time sensitive data, however this is a difficult judgement call since in the course of field research one has to balance out such losses with the unexpected opportunities and serendipity that also present themselves. It should be emphasised that embracing *lived methodology* is not intended as license for sloppy or carefree fieldwork practices, on the contrary, it is recognition of the tough job that researchers face when conducting fieldwork and a call to support them. A balance needs to be found between the researchers’ practical role as negotiator and manager of the field experience, and the need to organise this into academic form in a convincing way that reflects best practice. The next section will consider this last point further in a discussion centred upon interpretive processes of analysis.

The political craft of ‘authoring’ an analysis

In the design and conduct phases of research projects we are concerned with the question of ‘correct method’ (Gadamer 1975) and how, as professional academic researchers, to work towards this theoretical goal *while embracing our lived experience*. When one shifts attention to the more ‘front stage’ issues of analysis, the challenge is heightened, but this time the ‘Holy Grail’ is ‘truth’; truth in a complex social world of multiple

interpretations. So, who, what, where, when and why does one turn to for guidance concerning the construction of interpretive analyses? As Klein and Myers (1999) note, although conventions have been established for IS case studies conducted according to the natural science model, there is very little to support researchers who have chosen to undertake interpretive case studies.

Methodological accounts by researchers in the IS interpretive literature tend to provide some detail of data gathering and then pronounce that this was then 'analysed'. Some interesting papers have been published offering criteria for the *evaluation* of interpretive qualitative research (Kirk and Millar 1986; Golden Biddle and Locke 1993; Klein and Myers 1999). However, whilst these are a useful start, they are more concerned with the robustness of the final document, rather than the processes used to arrive at the findings therein. Editors have begun to recognise that processes of analysis are an important frontier of development for interpretive IS research, and are pressuring authors to provide more explicit accounts of how they arrived at their analysis (Klein and Myers 1999). Researchers need to feel that constructing authentic representations of their methods of analysis is itself a contribution to IS interpretive research. By making analysis processes accessible, one is contributing to the development of interpretive IS research in many important ways; detailed accounts support others working in similar modes, opens one's work up for constructive critique, and helps the community understand the nature of the contribution made by each piece of research. It is suggested that the application of interpretive principles to this issue could help to better understand why interpretive

analysis processes have remained one of the most opaque and least articulated aspects of interpretive methodology.

It is interesting to pause, and consider how the current deficit in analytic transparency has survived until now, and explore some of the issues that the interpretive IS researcher is *already involved in*. There are a number of influences that contribute to our present methodological congestion: including some of the most philosophically intense questions about the nature of truth, the political implications of such a debate, and its manifestation in a pluralist IS field where interpretive researchers are a minority distributed around the globe.

The debate surrounding the basis of ‘truth’ has been extensively discussed in other literature which, for the most part, has been well read by the interpretive IS community (for example, Latour 1987; Giddens 1993; Orlikowski and Baroudi 1991), extensive details are not needlessly repeated here. Suffice to say that natural science and social science now try to find a way to co-exist with the minimum of indulgence in ‘hate mail’ concerning their fundamental, and largely irresolvable, differences. However, so much of our resource infrastructure is bound up in the traditional hegemony, that it is difficult to circumvent residual political tensions. Despite a generation of alternative voices, it is suggested that the majority of traditional research methodologies perpetuate the Enlightenment myth that scholars occupy an elevated status in the world and can find the ‘best’ analysis, the ‘one’ legitimate, valid truth at the end of any research journey.

Academic journals, conferences and the interests of funding bodies are still generally biased towards positivist research, which reinforces an incentive-reward mechanism, and encourages a certain amount of political posturing by interpretive scholars (see Klein and Myers 1999). Even those students and professionals with an interest in the interpretive perspective, who are less aware of the resource politics in the IS field, find themselves caught by 'siren voices' of the Enlightenment, making them extremely anxious to pursue the 'correct' research results. As a consequence, students conducting interpretive research frequently verge on the apologetic with regard to the nature and status of findings in their research; like a soufflé rising in the heat of the interpretive intellectual 'trend', when they meet with a cold reception, they collapse, rather than substantiating their claims with further intellectual rigour.

The dissemination of interpretive processes of analysis has been shaped by a further set of situational issues connected to the emergence of information systems research as an inter-disciplinary field. Information Systems is a predominantly post-graduate area, as a consequence IS researchers tend to draw upon previous training in 'reference disciplines', as diverse as ethnography and computer science, to inform their work. As critics have noted (Benbasat and Weber 1996) this may limit the capacity for a wide audience to critique their work since few are masters or mistresses of every discipline. However, it is suggested that it is *not* the challenges of 'disciplined pluralism' (Banville and Landry 1989; Landry and Banville 1992; Robey 1996) that represent our main issues, but other subtle developmental dilemmas which need to be addressed.

Firstly, as a minority group we are handicapped by the rise of a certain ‘political correctness’ in a community where senior figures have supported pluralism. It is suggested that this has, ironically, truncated debate on interpretive analysis providing a political sanction that has ring-fenced both our achievements *and* our weaknesses. Secondly, interpretive IS researchers have formed a diaspora, clustering in ‘safe’, or perhaps more accurately ‘safe-ish’ enclaves where they can pursue their research. Whilst this local sense of community plays a key role in nurturing intellectual development, it may also lead to myopic reinforcement of shared practices. As the interpretive IS community grows it becomes increasingly important for situated, distributed expertise to be disseminated to overcome these barriers.

Having made a call for greater openness regarding the differences in IS interpretive methodology, a brief review will be made of the commonalities that seem to exist in our analysis processes, since these may form a foundation for further development. The application of interpretive principles and advice from experienced qualitative researchers suggests that although there is no ‘one best way’ to reach an analysis, any attempt at analysis needs to have a consistent emphasis on being *systematic*. This means that there is a coherent theoretical approach informing the approach taken, that it is conducted according to an actively managed plan or system, and that this is implemented in as deliberate a fashion as possible. This is not ‘systematic’ in a scientific sense of applying a model or rigid rules or criteria, but systematic in the sense that one has attempted to be as thorough and thoughtful as possible. Researchers often find that whilst interpretive principles are a useful starting point, they are too high level to support this goal, and

therefore search for a set of theoretical ‘tools’ with which to refine and focus their approach. The IS literature is testimony to the variety of ways in which authors have attempted this using methods as diverse as content analysis, economic models, organisational theory, cognitive maps and social theory. The adoption of these theoretical tools has to be considered carefully; they must be epistemologically sympathetic, and their consequences for the status and nature of the analysis carefully thought through.

The second set of commonalities in interpretive research relate to the *kind* of data that tends to be gathered. This is a topic that has been grossly overlooked by IS interpretive research in the past, and has only recently begun to be explored. When handling interpretive data, one must be sensitive to its status as narrative (Boland and Schultze 1996), and the influence of time (Adam 1990; Sahay 1998) upon (and within) that data. There is not enough space in a short journal paper to give these issues the lengthy discussion that they deserve, but some brief points will be made. When gathering and analysing interview data, the aim is not to find the interviewee/s that gave the answer closest to the truth, but rather to understand the processes and patterns revealed in multiple interpretations. Interview data is not ‘objective’, value free-data (Walsham 1995, 1995a), but reflect situated accounts in which the narrator is mindful of a subtle realism: the time, place and conditions in which the research is being conducted. Narratives tend to be constructed as a convincing explanation of ‘why things are the way they are’ (Becker 1998). When conducting longitudinal case studies one needs to comb

through interview notes and/or transcripts for landmark events and calendar dates which together will form both overview and ‘timeview’ of content, context and process.

Interview narratives reflect a powerful synergy of the person’s past experiences, perceptions of the present and projections of the future; a performance situated in time. The responses gathered from interviewees are active and reflexive rather than passive, for example in the Lending Advisor case the interview narratives often held complexities and contradictions as interviewees attempted to actively re-invent themselves over time, and their skill set, in order to survive (Giddens 1991; Barrett, Sahay and Walsham 1996; XXXX 1998). There are also often stark differences between the timely political rhetoric trotted out in some interviews, and later actions; for example the assertion early in the project by senior executives that ‘LA won’t lead to reductions in staffing levels’. Contradictions in data document a situated re-ordering of reality, or reflexive epistemology representing the interviewee’s interpretation of what constitutes ‘valid knowledge’ at a given time that often reflects current power relations. For example, why would certain actors be ‘scoped out’ of narratives at different times and places? Who or what emerges as important or ‘key’ to the interviewees’ ‘story’?

Many decisions associated with the crafting of the case study are situated in an important political sub-text. The way that the data is presented is crucial, as it will form the basis of the readers’ understanding, and will be a major influence upon whether or not they find the analysis convincing and authentic. The author of a case study presents a certain partial perspective; the case study becomes the ‘eyes’ through which the rest of the world

will see the events, and their account may inform future intervention in the situation. Writing a case study is, in many ways, a political act in which the author must take responsibility for the 'version' that they disseminate publicly.

Interpretive principles suggest that there will be multiple interpretations of any event or set of events, it is therefore surprising that more attention is not paid to preliminary and interim analyses. It is these processes that help the author to decide how to craft the findings, how to select which themes to take forward, and which to leave behind. Preliminary and interim processes are rarely articulated in IS interpretive research, and future work could make a significant contribution by revealing these processes for critique and constructive development.

On some levels one is analysing all the time (Schultze 1999), for example the interview provides an intense environment in which to see contrasts between 'pre-learning' or expectations with the answers received in practice. However this intuitive self-reflection should be supported by more formal procedures. For example, generating a table of interviewees that can be turned into an interpretive 'scattergram' revealing the different points of view gathered so far in the study. This can help the researcher consider the nature and status of the data, the kind of analyses they could support, and/or the revision of research designs. Or, making summaries of interview transcripts that highlight key quotes, supplemented by points taken from media or internal documentation, then experimenting by organising them around different themes, concepts and timeviews. At the heart of the interpretive case study analysis process are successive readings of the

data. It is during this rather arduous, meditative re-visiting of the now familiar that issues, themes and concepts form from the constituent fabric of the data. This organic process of analysis is considered vital to longitudinal case study research; although it can be supplemented by more formal content analysis (for example Nudist), there can be no substitute for it in this kind of interpretive study.

As major themes or issues (particularly contradictions) are identified, they can be pursued in discussions with peers, academic colleagues and the literature. Even in embryonic stages of analysis it can also be useful to pursue a theme in a piece of written work or seminar presentation. The process of writing itself imposes a certain ruthless clarity, exposing bone where the researcher thought there would be flesh, or inspiring 'chronigami moments' (Kavanagh & Araujo 1995), where she suddenly sees connections and processes emerge from formerly separate events. Such interim analysis processes can prove helpful, so long as one acknowledges their temporary status and remains 'open to revision' (Gadamer 1975).

These processes help the author to achieve 'critical distance' from the data. Content and context are integral to interpretive longitudinal studies, and intertwined with analysis of process, but should be held in check so that they compliment and inform, rather than swamp the study. The aim is to communicate details of the case without fatiguing the reader, which entails balancing overview with insight and taking care not to indulge one's own introverted interest in the micro-world in which the case is situated. It is common for researchers to refer to the 'richness' of case studies; however, this seems to often be

code for a rather egotistic defensive: 'I was there, and you weren't, so you can't challenge my interpretation'. Solipsism is a common charge levelled at interpretive researchers, and fuelling it can detract from its perceived value. Whilst one can acknowledge a certain privilege to an author's interpretation because they were 'there', and therefore commit oneself to reading lengthy case studies with valour, it is not sufficient to conclude these epic tales with an analysis which constructs scanty, nebulous implications for theory and practice as an after-thought.

Choosing which themes to pursue depends upon the interests of the researcher, the purpose of the research (for example it might be a Ph.D. degree or funded research project). It is a highly situated decision, shaped by the kind of audience that the analysis is being aimed at, and the time and place that it is being presented (for example a conference on technology and social issues, or presentation to mainstream seminar with IS colleagues). Knowing which medium will be used for distribution also influences this choice, since books give far more scope for the unfolding and development of a thesis than journal papers. The themes that emerge from the data need to be compared to existing literature and/or expectations, the gradually working through different theoretical lenses to find the one that has the most scope to serve in the construction of informed, interesting, insightful and useful contributions.

As discussed above, many interpretive researchers choose to refine and focus their interpretive perspective with theoretical 'tools', which support them in the analysis process. Increasingly IS interpretive researchers are turning to social theory to perform

this role in their research (Walsham 1993). It is suggested that social theory can serve an important role in connecting up local events with global trends. The interpretive perspective advises us that, just as our research choices are influenced by our social, political and economic context, so our analyses will also be ‘authored’ in a situation that will shape our contribution. It is suggested that this awareness reinforces the importance of interrogating the *context* of our research, of reflecting upon the potential way that our analyses may intervene in the world and of assuming responsibility for releasing it. This connects with the idea of a ‘subtle realism’ as proposed earlier in the paper; social theory helps us to understand how the situated perspectives gathered in an interpretive study relate to broader processes of social change, and how our findings might contribute to the direction of theory and practice in these areas. The role of social theory in information systems research has been discussed elsewhere (Walsham 1993), and therefore will be not be explored further here. Suffice to say that empirical data is used to ground the social theory, with the intention of better understanding both the phenomenon under study, and the theory. The author is not searching for mechanistic prescriptions for practice, or finding the ‘best social theory’ to use in research, or ‘proving’ a social theory; instead the aim is to construct an analysis that is insightful and informs the actions of the researcher herself, fellow researchers and practitioners.

A subtle realism helps the researcher to develop a sense of the situation, and how their findings might intervene. Although part of the value that our work holds for practitioners lies in our capacity to assess multiple perspectives in an informed and systematic way from a fairly independent position, we are also *already involved* in the world. Both from

an interpretive point of view, and the political/ethical situation presented by contemporary society, the notion of an totally objective, detached researcher is not sustainable. In interpretive research, one is working with perspectives from multiple stakeholders and has to make a decision about who to give a voice, and how to position this voice. It is suggested one has to take responsibility for ‘authoring’ interpretive analyses, and the case studies used to support them. Whilst rejecting the notion that IS research needs to taper its focus to popular interest for the sake of its ‘ratings’, an alternative motivation for finding ways to contribute to forums beyond the academy is suggested. Academics could play an important role, not just in the production of ‘prescriptions’ and ‘up-to-date literature reviews’ for busy practitioners, but by engaging in controversial and alternative discussions on the risks of certain steps and plans in advance (Beck 1992). As Popper said: criticism means progress.

Conclusion

The paper proposes a shift in focus from methodological theoretic to acknowledgement of situated, distributed expertise reflected in the term ‘lived methodology’. It is hoped that a fundamental message has been conveyed here: that there is the grand in the mundane, and the mundane in the grand. The rigid dichotomy between theory and practice needs be deconstructed because it is constraining the development of a knowledge base that could enabled IS fieldworkers to deepen their expertise. Further, it is suggested that reflexivity between theory and practice intensifies certain political and ethical issues with which researchers, as social actors in the world, need to engage.

In sections organised around design, conduct and analysis, interpretive principles are turned upon IS research with the aim of adding to the understanding of methodology in the field, and stimulating debate between various schools of thought within IS research. The paper sets out to influence and inform the way that methodologies, particularly those involving fieldwork, are appropriated, regarded and written about by interpretive IS researchers. Some critical reflections upon experiences in the field are provided to emphasise the way that the decisions/choices made by interpretive researchers may influence the status and nature of their findings. Particular emphasis was placed upon political and ethical contexts which have to be managed by the author throughout the research process. The discussion is intended to encourage the release of situated, distributed expertise, and contribute to the Latourian network of interests involved in this kind of research, giving them a sense of community and hopefully tugging at some of the more restrictive power practices.

It is suggested that interpretivist IS researchers have been so busy defensively saying what they are *not*, that they have neglected to express openly enough what they *are*. The subtle indeterminacy surrounding the term 'interpretivism' has been used as license to truncate a scholarly obligation to make our methodology explicit and accessible to others. However, if we do not continue to interrogate the meaning and relevance of interpretive research we will have established a 'broad church' with the congregation asleep in the 'pews'. The lack of accessibility in current methodological accounts is limiting the

progress of interpretive research, failing colleagues in the community who are interested in understanding and developing distinctive interpretive analyses.

Interpretive IS research contributes important and significant analyses, however their nature and status need careful thought. Interpretive methods of analysis are by their nature partly *intuitive*, which some members of the IS community find provocative, rather than evocative. Imposing a formality upon this cumulative, and sometimes illusive, process can be challenging. Whilst one can in some sense present a ‘reverse engineered’ narrative about how one develops an analysis from field data for the purposes of a formal ‘methodology’, in practice the process is not so neat and tidy. This does not, however, excuse us from presenting authentic, scholarly experiences of *lived methodology*, that others may learn from. One has to accept that part of the interpretive analysis process is beyond methodological means proper to natural science. Interpretive findings are true or untrue, valid knowledge or not valid knowledge not only in the sense that methodological criticism decides, but in the sense that it presents a truth that can be shared (Gadamer 1975). This is a conception of knowledge and of truth that corresponds to the whole hermeneutic experience, an ‘experience of truth’ that emerges from the researchers’ commitment to actively *seek the truth*, rather than believing that there is only one truth.

Interpretive analyses play an important role in setting agendas for debate, casting explanatory light, generating ideas, and by challenging taken for granted assumptions. In advocating a moral-practical approach, the suggestion is not that we should all become consultants, or that every piece of research must be oriented to this end. Developing

bodies of theory is important, and must continue since in the long run, 'there is nothing so practical as good theory'. Regardless which approach one takes, its limitations need to be carefully considered; in the case of social science, our analyses are always likely to be out-flanked by events. However, information systems are the generic pervasive technologies of contemporary society, as the printing press was to the industrial society, and our field therefore has a strongly reflexive relationship with practice. This puts us in a position where our work can try to influence the development of societies, so lets try.

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