

## Chapter VI

# Doing Critical IS Research: The Question of Methodology

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### INTRODUCTION

Critical Information Systems (IS) research denotes a critical process of inquiry that seeks to achieve emancipatory social change by going beyond the apparent to reveal hidden agendas, concealed inequalities and tacit manipulation involved in a complex relationship between IS and their social, political and organisational contexts. It has its philosophical and theoretical roots in *critical social theory* (Held, 1980; Fay, 1987; Morrow & Brown, 1994). As a critical social researcher studies the social life of people in order to help them change conditions and improve their lives, so too does a critical IS researcher. By demystifying technological imperatives and managerial rationalism justifying a particular information system design, the critical IS researcher helps both IS practitioners and users understand its social consequences, envisage desirable alternatives and take action.

Like interpretive approaches to IS research, critical theory-informed approaches came along as a reaction to positivism. While interpretive researchers aim to understand and describe “the *context* of the information system, and the *process* whereby the information system influences and is influenced by its context” (Walsham, 1993),

critical IS researchers go further to expose inherent conflicts and contradictions, hidden structures and mechanisms accountable for these influences. Critical IS researchers aim to reveal interests and agendas of privileged groups and the way they are supported or protected by a particular information system design or use. More generally, they aim to discover and expose attempts to design and (mis)use IS to deceive, manipulate, exploit, dominate and disempower people. By doing so they aspire to help them resist these attempts, hinder such misuse of IS and promote liberating and empowering IS design and use.

Such concerns and critical orientations have inspired diverse research programs in IS that have been recognised as a new, critical paradigm in IS research (Hirschheim & Klein, 1989; Hirschheim, et al., 1996; Iivari et al., 1998). While they succeeded to (re)open the fundamental questions of the nature of IS and their social reality, and increase awareness of normative knowledge, critical IS researchers faced serious problems. The very assumptions of critical IS research have been questioned and its objectives deemed unachievable. Critical researchers have even been accused of promoting yet another 'totalising discourse' (Wilson, 1997). On the other hand, proponents of the critical paradigm in IS have long been aware of its weak empirical grounding and the lack of appropriate empirical methods (Lyytinen, & Klein, 1985; Lyytinen, 1992; Klein, 1999). Most notably, critical researchers themselves identified a problematic relationship between critical theory and empirical research methods as a key problem, though not unique to the IS research (Morrow & Brown, 1994, Klein, 1999; Forester, 1992).

This chapter addresses these issues by focusing on the question of methodology in critical theory-informed IS research. Methodology is understood here in its philosophical sense as an overall strategy of conceptualising and conducting an inquiry, and constructing scientific knowledge. Methodology, therefore, refers not only to research methods or techniques (such as case study or interview), but also to the epistemological assumptions of methods and how they are linked to a particular theory. A critical research program in IS sets an agenda and the types of explanatory substantive problems for which some methods are more appropriate than others. Critical research methodology is explicitly concerned with the choices about linking theories and methods in any specific research context. Moreover, the ultimate concern of

critical IS research methodology is the implication of critical inquiry on social practices in the development and use of IS.

The purpose of the chapter is to explore the relationships between a critical theory, empirical methods and research questions asked in IS research situations. Given the diversity of contemporary critical research programs such an exploration may involve a comparative study across different programs and theories or may focus on specific ones with limited generalisations. In this chapter I endeavour the latter. I examine a methodological strategy I applied to link a particular theory, specifically Habermas' theory of communicative action (1984, 1987), with empirical methods in an inquiry of organisational public discourse via Computer-Mediated Communication. By drawing on my experience from this inquiry I reflect on the critical issues I faced and methodological choices I made. While such an account is necessarily idiosyncratic, I attempt to demonstrate that the lessons learned are relevant for the emerging debate on methodological issues in critical IS research.

## **AN EXAMPLE OF CRITICAL IS RESEARCH: A STORY OF THE UNIVERSITY DISCOURSE VIA COMPUTER-MEDIATED COMMUNICATION**

This section aims to provide an illustrative example of critical field research into organisational discourse via computer-mediated communications (CMC) during a university restructuring process. The intention, given the methodological focus of this chapter, is not to substantively elaborate on the field study itself, which has been presented elsewhere (Cecez-Kecmanovic, et al. 1999, 2000; Treleaven, et al. 1999), but to describe it briefly to illustrate the type of questions asked and to reflect on the methodological issues and strategies.

As a member of University X in 1996-1998 I conducted a field study of a University-wide strategic restructuring process triggered by a crisis following funding cuts by the Federal Government. At the end of 1996, the President of University X initiated a *consultation with staff* with the aim to involve staff<sup>1</sup> in a broad-based discussion about the challenges the University was facing and future potential restructuring and rationalisation of the University to respond to these challenges. The consultation took place face-to-face (in public forums, facilitated workgroups, a conference, and a variety of working teams and commit-

tees) and via computer-mediated communication (CMC). CMC consisted of a particular set-up of e-mail and intranet managed by a coordinator and accessible by all staff. It enabled each staff member to get, send and retrieve messages and documents related to the consultation. As the consultation process evolved throughout 1997, the discussion via CMC emerged as a key University discourse that ultimately impacted upon the decision how to restructure the University.

It is important to note that the purpose of CMC, as expressed by the President and the coordinator on various occasions, was to:

- enable organisation-wide communication, discussion and sharing of information independent of limitations imposed by time and space
- maintain an accessible electronic repository of all messages and documents created in the process
- enable effective and efficient coordination between different individuals and groups involved in the consultative process.

Throughout the consultative process more than 130 messages, discussion papers and documents (to be referred to as e-mail messages) were exchanged via CMC. Approximately 30% of those were submitted during initial exploratory phases before September 1997. The President then proposed (by e-mail) his draft *Restructure* document, outlining major changes of the academic structure, funding, income generation, administration and management. He clearly stated that he wanted to hear staff responses and that all issues were open for discussion. The ensuing so-called *September discussion* included 67 e-mail messages (by individuals, schools and faculties) ranging from one paragraph to 15 pages. Shortly after the close of this discussion the President announced his final *Restructure and Implementation Plan* document which was subsequently implemented. The rest of the discussion till the end of 1997 amounted to less than 20% of the messages.

The extensive use of CMC throughout the consultation made all information readily accessible to all staff, opened the restructuring process to all interested parties, and generally gave an impression that the process was transparent and inclusive. All through the consultation until September the expectations that CMC would foster freedom of speech, increase equality of participation and reduce status-related barriers seemed to be well-founded. However, as the electronic discussion unfolded, especially during the intensive September discussion,

participants noticed that the President did not actually engage in argumentation. He did not respond to participants' criticism of and arguments against the proposed changes in his *Restructuring* document, nor did he comment on counter-arguments and alternative proposals. His understanding of the University problems (eg. how funding cuts can be absorbed and what makes the academic structure flexible) and his major solutions (eg. centralisation of staff funding) were not altered despite well-argued criticism and counter-proposals expressed by many participants during the debate. All major changes he proposed in the draft *Restructuring* document remained unchanged in the final document, and subsequently implemented.

My interest in this study initially was the examination of transformational power of CMC in the University-wide discourse, especially the potential for empowerment and democratisation. Early in 1997 I got together with two other members of the University, one academic and another member of the staff development unit, and we created a small research team. We broadened the focus of the field study to include social, cultural, historical and political context (at both local, group level and University level) and the ways CMC was appropriated in different contexts. As we were members of the University we got all the e-mails from the consultative process. We stored them and analysed them as the process evolved. We also observed meetings and other face-to-face discussions and kept field notes. We regularly exchanged our observations and often talked about problems of being both participants and observers in the process.

The interpretation of e-mail messages and documents and the analysis of the flow of argumentation process became the central focus of our research strategy. As the consultation evolved, growing more complex and diverse, we became increasingly concerned with differences in our interpretation of discussions and our understanding of others, and what was going on through CMC. That, among other things, prompted us to consider interviewing staff in order to get more information and test some of our interpretations. In the second half of 1997 we started semi-structured interviews with staff. A new team member (a former employee of the University) was engaged to help us conduct interviews (in most cases we interviewed individual staff but in a few cases a small group). By mid 1998, fifty interviews with a wide-range of University members were completed, taped and transcribed.

The President's establishment of the consultative process, including CMC as an extended social space for public discourse, on the one hand, and subsequent ignorance of criticism and counter-arguments by staff, on the other, were contradictory. It was not until September, when the most intensive debate about *Restructuring* took place, that I became aware of this sharp contradiction. It was difficult to explain why the President would invest so much effort and energy to *consult with staff* if he ignored their criticism, arguments and proposals (I'll refer to this as the first contradiction). Moreover, how could such an open, transparent and seemingly democratic process, assisted by CMC, be used to advance a repressive outcome (the second contradiction)?

## REFLECTIONS ON METHODOLOGY

In the above example methodological choices were made along the way, as research evolved and questions emerged. My experience confirms that “a defining characteristic of critical research methodology is that choices about linking theories and methods are an ongoing process that is contextually bound, not a technical decision that can be taken for granted through references to the ‘logic of science’ “(Morrow & Brown, 1994, p. 228). My reflections in this section will highlight some aspects of *reflexivity* and *dialectical character* of the critical IS research methodology, as revealed in the relationship between theory and method and between a theory and methodological strategies.

### Reflexivity

Research in the critical tradition is characterised by reflexivity, involving forms of self-conscious criticism as part of a strategy to conduct critical empirical research. Researchers explore their own ontological and epistemological assumptions and preferences that inform their research and influence their engagement with a study. By intentionally expressing, questioning, and reflecting upon their subjective experiences, beliefs, and values, critical researchers expose their ideological and political agendas. Thus, as Kincheloe and McLaren imply, “critical researchers enter into investigation with their assumptions on the table, so no one is confused concerning the epistemological and political baggage they bring with them to the research site” (2000, p. 292).

In the context of critical research methodology such reflective practice is relevant in at least three aspects. Firstly, it helps researchers understand their own engagement with subjects in a field, identify sources of different/conflicting views and beliefs, and potentially change their own. Secondly, it helps researchers make explicit connections and comparisons with relevant circumstances and experiences in the past (in the same or different organisation). Thirdly, it enables a team of researchers to develop mutual understanding and explore differences in interpretation and explanation of empirical material.

The assumptions and beliefs I brought into the research of CMC date back to the 1970s, years of great hope for democratisation in my former country (Yugoslavia). By a stroke of luck I was introduced first hand to the contemporary critical thought by attending the famous Summer school on the island of Korcula that attracted leading critical theorists from both West and East<sup>2</sup>. As a student (and an active participant in the student movement) I was very appreciative of these ideas and came to believe that they would lead towards greater democratisation of our socialist system.

Later on, as an academic and researcher in IS, I conducted a large 5-year project on “The Social System of Information” (in the then Republic of Bosnia and Herzegovina) that had a dual objective: to analyse and assess the existing information production and decision-making processes in society, and to propose a new design of this system to better serve the needs of the self-management system from the local community level to the Parliament (Cecez-Kecmanovic, 1987). This project was based on the assumptions that the accessibility of free (and uncontrolled) sources of information to citizens and their representatives in the Parliament and other social and political institutions will support and enable democratisation processes. The proposed design relied on the advanced information technology (IT) already available in some institutions (eg. statistical organisations, unions). But the break-up of Yugoslavia and a tragic course of events in the last decade prevented its implementation. My beliefs and assumptions about the transformative potential of IS remained unchallenged.

Moreover, my beliefs in a democratising potential and emancipatory role of IS were being substantiated by the literature on the impacts of groupware and CMC (Kiesler & Sproull, 1992; Siegel et al., 1986). Claims such as that CMC technologies “are surprisingly consistent

with Western images of democracy” (Sproull & Kiesler, 1991, p.13) seemed to me reasonably well grounded.

It is not surprising, then, that I did not have any doubts in my mind that the expected (and publicly declared) role and purpose of CMC in the University consultative process would be realised. In fact, my beliefs and assumptions played an important role in my framing the research questions and choosing strategies to investigate it and conduct research. It was in the course of this research that I started to question my assumptions and beliefs, and to ask myself about their origins. Needless to say that in the course of this research I learned to articulate, question, and examine my assumptions and beliefs. I also learned to disclose my illusions, values or ideologies. “The point is—as Garrison (1996) explains—not to free ourselves of all prejudice, but to examine our historically inherited and unreflectively held prejudices and alter those that disable our efforts to understand others and ourselves” (p. 434).

Another moment of self-reflexivity became apparent when we (the members of the research team) attempted to ‘resolve’ our differences in interpreting meanings (what participants actually *meant* by saying), in understanding their actions (what they actually *did* by saying), and in formulating our own actions (what can or should *we do* to assist participants). While I was conscious that our interpretations were grounded in our lifeworld and our individual life histories, experiences and prejudices, I had difficulties in finding strategies to overcome it. Denying or suppressing our individual differences, however, would have distorted our communication and collaborative process. Self-reflexivity, we found, is critically important but does not magically resolve differences. Continued questioning of individual assumptions and interpretations as well as criticism and self-criticism seemed at times disruptive to our otherwise good team relationships and cooperative spirit. Living with differences, nurturing critical self-reflection and inter-subjective reflectivity as we went, turned out to be our way of ‘resolving’ them. As a result we did not necessarily eliminate our differences but we certainly enriched and enlarged the set of our shared assumptions, beliefs and values, that is, our assumed *background knowledge*.

While these reflective practices may be more or less important for any empirical research strategy, they are of fundamental importance to





The purpose of the study initially was to explore, document, and interpret the use and appropriation of CMC in the consultative process focusing on different social and cultural contexts (within groups and at the University level). Initially the study was conceptualised as an interpretive ethnography (Schwandt, 2000). We engaged in participant observation of face-to-face meetings and other less formal gatherings. In addition we downloaded all messages and documents submitted by CMC as part of the consultative process. We analysed the content of these texts and interpreted the meanings to gain understanding of the consultation and how CMC was appropriated. Given our initial research question and the hypothesis that CMC will be appropriated differently depending on the social context and culture, ethnographic methods seemed appropriate. The observation of local contexts (both academic and administrative departments) and the ways CMC was used to communicate the views of members in these departments provided rich descriptions we subsequently analysed and reported (Cecez-Kecmanovic et al., 1999).

As the consultation evolved, the discussion via CMC intensified and especially during September took over and became the major public discourse concerning the future of the University. As participants in this process we sensed some major changes in the significance of CMC discourse. CMC was perceived less as a faster and more effective means of communication and exchange of messages, but more as a public sphere where different views (of the University funding crises) and values were confronted, where meanings and collective understanding were created. The methods we applied thus far were not sufficient to make sense of what was going on via CMC and to gain deeper understanding of the process. We needed a map or guide to the new social space that was in the process of making via CMC.

In this moment the significance of a social theory informing our inquiry emerged. I found in Habermas' theory of communicative action such a guide enabling us to explore not only what linguistic expressions or acts (as Habermas calls them) *mean* but also what they *do* and what they *produce* in the life-world of participants.<sup>3</sup> Bringing Habermas' theory into the scenario of the empirical inquiry put new requirements on the interpretation of e-mail postings. In this context the purpose of hermeneutic interpretation became to develop understanding of communicative practices in CMC and reveal hidden forms of distorted communication that impacted upon the lifeworld of participants. Con-

sequently, it was also intertwined with changing the research question or, more precisely, learning to ask more specific questions. For instance, some of the questions were: how participants used language to express themselves in e-mail messages and how such e-mail *linguistic acts* produced a particular type of action; in what ways such communicative practices (the linguistic acts and social actions of participants) shaped discourse, how they framed perceptions and problems to be resolved, established personal and collective identities, legitimised power relations and the production of organisational knowledge; and finally, to what extent such communicative practices were enabled and assisted by the particular features of CMC used.

While our inquiry originally started as an ethnographic study (aiming to improve understanding of how CMC was appropriated in a particular social context and culture), it was transformed on the way due to both our improved understanding and the evolving nature of CMC as an extended social space. As we adopted the new map (a particular critical theory) to guide our examination of the CMC as a social space, we faced problems characteristic of any critical research inquiry. The relationship between the theory, research questions and the empirical methods surfaced as a key issue for our research strategy.

The main difference brought by Habermas' theory was the change of focus from interpretation of individual e-mail discussions (that is their meaning within the context of consultation and the University broader context) to interpretation of the communicative practices and dialogical structures embedded in the e-mail discussion. From the text of the flow of participants' e-mail discussions we aimed to make sense of their linguistic acts and actual actions, that is what they wanted to achieve and how. Furthermore, we aimed to reveal how their linguistic acts and social actions affect their everyday lives, shape their beliefs, (re)create their identities and power relations, as well as legitimate knowledge (what is true, good, right). The underlying question here is to what extent specific communicative practices and resulting symbolic reproduction of the lifeworld are assisted or discouraged by CMC. To be able to achieve research objectives, to reveal the complex texture of social actions, system and social integration we adopted *critical ethnography* (Thomas, 1993; Myers & Young, 1997; Myers, 1997; Forrester, 1992). We adopted critical ethnography to help us discover how an apparently open and participative CMC discussion was in effect undemocratic; how CMC, introduced as a means for accessibility of

information and transparency of the process, in fact enabled distorted communication, disempowerment of participants, and preservation of the existing power structure.

I would like to note here that we, as researchers, were very much aware of the uncertainty and fragility of our interpretations. As it is well argued by critical hermeneutics (the underlying philosophy of critical ethnography) “interpretations will never be linguistically unproblematic” (Kincheloe & McLaren, 2000, p. 289). For this reason our interviews with both participants and non-participants in the CMC discussion had the form of a dialogue. We shared with them interpretations and explanations of critical issues trying to achieve mutual understanding. This aspect of transition from interpretive ethnography to critical ethnography is nicely expressed by a quote:

“The paradigm is no longer the observation but the dialogue— thus, a communication in which the understanding subject must invest a part of his subjectivity, ... in order to be able to meet confronting subjects at all on the intersubjective level which makes understanding possible” (Habermas, 1973, p.10).

### **Relationship between a theory and methodological strategies**

The focus of this section is exploration of linkages between a theory and methodological strategies. The discussion reflects on the use of Habermas’ theory of communicative action (1984, 1987) and methodological strategies applied in the research of the University CMC discourse. For that purpose I analyse two moments or substantive issues that exemplify the nature of this relationship: a) interpretive analysis of linguistic acts and social actions in CMC discourse, b) interpretation of relation between social interaction, system integration and social integration. To make it more comprehensible to the reader I illustrated graphically my interpretation of this part of Habermas’ theory (in Fig 1).

#### *Linguistic acts and social actions in CMC discourse*

The speech or linguistic acts are observable parts of linguistically mediated social interaction. Unlike face-to-face interactions that also involve body language, in CMC a researcher (as well as a participant) experiences only textual expressions (e-mail messages) from which one makes sense of linguistic acts, actors’ intention and social actions.

Following Habermas (1984), the CMC discussion can be analysed at two levels of social interactions (presented in Fig 1.):

- the level of linguistic acts and
- the level of social actions constituted by individual linguistic acts.

To understand the performative aspect of linguistic acts (what words actually *do*) we (the research team) had to comprehend social actions accomplished by these acts. First, we had to find out what were the actual goals and intentions of participants. Second, we had to discover their orientation in pursuing the goals. During the consultative process, the President was pretty explicit in his e-mails and the *Restructuring* document that his objective was to solve the financial crisis by restructuring the University (including a centralised model for staff funding). He publicly presented his views and his particular solutions via CMC and invited staff to respond to them. However, despite significant criticism he himself did not engage in debate about contested issues. The way the President engaged in the argumentation process suggests that he adopted a success-oriented attitude and thus his action may be interpreted as *strategic*. However, the analysis of his linguistic acts indicates that he did not want to show his strategic intent and that he upheld the appearance of communicative action (acting as if he is oriented to mutual understanding). In Habermas' theory this action is called *a covert strategic action*.

The attitudes of staff participants in the consultative process can be classified in two broad groups: one group that responded to the Presidents' invitation for debate by acting strategically themselves and the other that attempted to act communicatively. By accepting the President's invitation to be consulted and by adopting CMC productively to engage strategically so as to counteract his strategic action, staff from the first group established their identity as more or less successful players in the game and relevant negotiators regarding conflicting matters. Other staff participants believed that the President's invitation to consult with staff meant that he wanted to establish mutual understanding with staff and define problems cooperatively. They understood the consultative process and the public debate via CMC as an opportunity for a *community dialogue* and a communicatively-achieved agreement (they would typically start their message with *Dear colleagues*, indicating that they are talking to all staff, not only to the President). These participants undertook a communicative action trusting that the President did too.

For the President the use of CMC was essential to undertake covert strategic action:

- He used CMC (e-mail especially) to expose his ideas and proposals to public scrutiny and criticism thus establishing an appearance of an open dialogue, free criticism, unrestricted debate in which *everybody can have their say*.
- He interacted with staff via CMC on many occasions, attempting to show his sincere intention to listen and establish trust, but never engaged in an argumentation process.
- The e-mail discussion created such a huge number of different comments, ideas and proposals that, without careful analysis, it was not possible to make sense of what the University community wanted.

In such a way he used CMC instrumentally to conceal his strategic intent and pretend to act communicatively. This partially explains why he took the trouble of conducting the consultative process (first contradiction).

Staff, on the other hand, used CMC to achieve their goals as well. CMC enabled their voices to be heard. However, those who behaved strategically used CMC to influence and persuade the President. Others who behaved communicatively perceived CMC as a forum for achieving mutual understanding about the funding problems of the University and coordinating actions of all involved.

The above analysis illustrates the methodological strategy adopted at a micro level of social interactions. The analysis of linguistic acts and social actions went back-and-forth: first, the meaning of linguistic acts was derived from the text, within a limited understanding of the context (preceding flow of e-mails, other parts of the consultative process, history of the University etc.); second, the actions were interpreted based on the meaning of linguistic acts; third, linguistic acts were re-interpreted as constituents of social actions.

This analysis, as a particular kind of hermeneutic circle that never ends, is a micro analysis of social interaction that reveals characteristics of communicative practices (eg. strategic vs communicative acting, covert strategic actions) and provides a limited understanding of this process. To move to a new level of understanding we had to broaden our investigation to consider the implications on both economic viability of the University (*system* aspect) and the lifeworld of participants. In other

words our methodological strategy had to change to embrace macro analysis as well (that is, include all three components from Fig 1.).

*Systems integration versus lifeworld integration*

By performing linguistic acts and carrying out social actions, participants in the CMC debate not only pursued their goals, they also defined a situation and a problem at hand, they presented themselves and recreated personal and group identities, they (re)established their position and legitimacy, they maintained or altered their working relationships, etc. Linguistic acts and social actions cannot be fully understood without their impact on *systemic integration* and *social integration* (Habermas, 1987). Namely, interpreting Habermas in the organisational context, the University can be seen simultaneously as the system and as the lifeworld of its members (Fig 1). A system aspect of the University involves its material and intellectual production, its economic foundation, administrative and management structure, rules and regulations, and the like. It is largely determined by Government regulations, policies and funding. In the CMC discussion it is pointed out that in order to survive, the University needs to consider economical, efficient, and effective delivery of courses, needs to have flexible staff management, to be cost effective, etc. In a word, it was driven by *purposive rationality*.

The lifeworld, on the other hand, is the symbolically (re)created, taken-for-granted universe of daily social activities of members. It consists of unproblematic, cultural knowledge shared by University members, that involves vast and unexpressed sets of beliefs, convictions, tacit assumptions, values that are in the background of social interaction. Members draw upon this knowledge to make sense of a situation, other actors, and their linguistic acts, and to take actions. When, for instance, participants in the University discussion refer to *community*, identify themselves as *we*, they in fact have in mind their lifeworld. By acting communicatively and coordinating their actions based on mutual understanding, actors rely on membership in the University as a social group and their lifeworld, and strengthen the social integration of the group. In Habermas's words communicative actions serve as a medium for symbolic reproduction of the lifeworld.

To transcend the limitations of the micro analysis of social interaction, we adopted a methodological strategy to consider mutual relationships between social interaction, system integration and lifeworld

integration (see Fig 1). By doing so we situated hermeneutical interpretation in a larger whole (the whole University and its environment). Differentiation of actions oriented to success and actions oriented to reaching understanding enables distinction between systemic integration and social integration. System integration operates through strategic action, driven by economic and administrative rationality, and disconnected from values and norms of members. On the other hand, the lifeworld is reproduced and rationalised by way of communicative action, in which intersubjective understanding, achieved through language, is a basis of action coordination. These are mechanisms by which social integration is achieved.

In the case of the University X systems concerns, as expressed by the President, include effectiveness of its operations, efficient and flexible academic structure, centralised resource allocation, ability to earn income, etc. The key action in the President's Restructure document was centralisation of staff funding presented as an imperative for the University. Interestingly he did not use his legitimate right to make such a decision without any consultation. He chose to pretend that he was acting communicatively thus heeding lifeworld concerns of community while in fact he acted strategically (concerned with system issues). He presented his solution as resulting through the common will anchored in the communicative practices that, to quote his words, "*emerged from collegial processes traditional in a university, as reflected in institutional discourse and related consultative activities*". From the interpretation of (intended) impacts on the lifeworld we were able to understand why he did so. By concealing his strategic action and presenting it as a communicative action, he aimed to legitimate it in the community and gain broad acceptance by the University members. From his point of view this was necessary for effective implementation of his restructuring proposal. This line of interpretation from social interaction complex to lifeworld or to systems issues and back helped us reach a fairly sufficient and convincing explanation of the first contradiction.

As to the second contradiction, that is, how could an open, transparent and seemingly democratic process be used to advance a repressive outcome, it is necessary to view the use of CMC in the consultative process from the macro perspective of the interplay between systems and lifeworld.



In order to answer this question we focused on the argumentation process, the ways claims and arguments were raised, responded to or ignored. A remarkable point was that the President never responded to the critique and counter arguments raised by staff. While he declared that he was open to any suggestion he never engaged in a discussion about substantive issues. Moreover, staff rarely paid attention to, supported or rejected other staff's criticism, arguments and counter arguments. The CMC discussion did not have a dialogical structure. The intensive traffic of e-mails however preserved the illusion of a dialogue. We interpreted it as a hidden mechanism reinforcing the existing power structure. Furthermore, we found out (from the interviews) that as a result the staff felt that he pushed the lifeworld concerns and systemic imperatives further apart. Eventually, staff became aware that *system imperatives* were given preference to community concerns and social integration. The conduct of the consultative process via CMC made it possible for the President to exert strategic influence on the decisions of other participants "while bypassing processes of consensus formation in language". As a result the lifeworld context of participants "gets *devalued*: the lifeworld is no longer necessary for coordinating actions" (Habermas, 1987, p. 281).

This is precisely what Habermas perceives as one of the dangers of increased complexity of modern organisations and society: when systems integration takes over and subsumes social integration, this leads to 'colonization' and erosion of lifeworld. The interpretation of the CMC discussion in the light of the two competing principles of societal integration and system rationalisation in the University restructuring process enabled us to suggest a possible explanation of how an open and transparent CMC discussion was used to advance a repressive outcome (the second contradiction).

I have to note here that this example illustrates only one possible constellation among a range of possible constellations and interdependencies between systems and lifeworld. Systemic and societal integration are not necessarily competing developments either. They can in fact be complementary. On one hand, systems maintenance and development can be subject to the substantive and normative restrictions of the lifeworld. Conversely, societal integration through communicative action can be subject to the constraints of material reproduction. However, only if a rationalised lifeworld of a social group subjects the imperatives of system maintenance to the needs of its members, could

an organisation hope to become emancipated (Wellmer, 1994). Based on the research outcomes from this inquiry, I can foresee the need for a new methodological strategy to go further and explore necessary organisational conditions and requirements for technological support to assist members in their struggle towards an emancipated organisation.

The analysis in this section illustrates methodological choices made in linking a particular critical theory, research methods and emerging research questions. For instance, the reflection on the methodological strategies in this chapter illustrates how Habermas' theory is injected into hermeneutical circles to guide interpretation of social and cultural texts produced via CMC, in order to connect the micro-dynamics of everyday social interaction with macro-dynamics of social structures.

## **CONCLUSION**

The question of methodology in critical theory-informed IS research cannot be reduced to the 'problem' of the lack of empirical methods. Methodology, understood as an overall strategy of conceptualising and conducting research, is concerned with choices about linking critical theory, empirical methods and research questions in specific IS research situations. First, a choice of a critical theory sets a research agenda and poses specific research questions. Second, based on the epistemological assumptions and the kind of questions investigated, appropriate methods and their application need to be considered. Third, methodology is concerned with principles and processes of constructing scientific knowledge and making changes in social IS practice. Methodological debate, therefore, needs to address a much broader range of issues beyond the narrow view of specific critical empirical methods.

While the uniqueness of critical theory's methodology has been associated with reflexivity and dialectic character, it has not been associated with specific research methods. However, some empirical research methods are more likely to be appropriate than others. For instance, critical ethnography and participatory action research seem to share a common ground with critical epistemology and therefore are more likely to be appropriate for critical qualitative research. An interesting question for future debate may then be under what conditions certain empirical methods can be applied in critical theory-

informed IS qualitative research. Another possible direction would be to develop more specific critical research methods either within a single research program (informed by a particular critical theory) or across programs.

Given a considerable diversity of contemporary critical research programs and the novelty of critical research in IS, comparisons of methodological strategies would be extremely interesting. This may, for instance, include comparisons of two critical research programs similar to the one by Morrow and Brown (1994) who compared a program informed by Habermas' theory of communicative action with a program informed by Giddens' theory of structuration.

Critical research methodology has yet to reach its potential in qualitative IS research. For IS researchers, to engage in critical research is to participate in critical thinking about IS and organisations, guided by a vision of organisations as communities and of its members as emancipated workers. It is, to use Kincheloe and McLaren's words, *a pragmatics of hope in an age of cynical reason*.

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## ENDNOTES

- 1 The University staff involved approximately 250 academic and 420 general staff.
- 2 Richard Bernstein the editor of *Habermas and Modernity* (1994) dedicated the book to his “Yugoslav Praxis colleagues who have been so courageous in fostering the ideals of democratic socialism by their words and deeds” (p. 32). In the Introduction he paid tribute to philosophers and social scientists of the Yugoslav Praxis group who strongly opposed Stalinist tendencies in Eastern Europe and advocated “the principles of self-management and participative democracy at all levels of society” (p. 32). The Yugoslav journal Praxis and the Summer school on the island of Korcula “became a meeting ground for progressive left intellectuals and students from Eastern and Western Europe as well as from English speaking countries” (p. 31), including Bloch, Marcuse and Habermas.
- 3 For me, the choice of Habermas’ theory of communicative action was natural as the assumptions and values the theory is based on coincide strongly with my own. However, this was not necessarily the case with other team members who did not have prior knowledge of the theory. Nevertheless, this did not obstruct our collaborative interpretation, as they were not biased either in favour or against this theory.