



Action research and intervention research in the French landscape of organizational research

The case of ISEOR

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Abstract

Purpose – This paper aims to present a concise history of the main action research (AR) contribution in France. The authors discuss the role of AR in the organizational research field in general and compare it with intervention research (IR) and presented Institute of Socio-Economy of Enterprises and Organizations's specific contributions and its presence on the international stage through review publications and wider works.

Design/methodology/approach – A narrative approach was used to analyze this history.

Findings – AR is considered as a research family. The authors define and compare AR with other qualitative methods. They analyze AR and IR principles, which include interaction with practitioners, negotiation with them, focusing in the third part on the case of ISEOR research team.

Social implications – AR and IR permit to bridge the gap between researchers and practitioners, to develop useful research. At the same time, they permit to develop new researchers' competencies and to fund research, in a context of reduced public research funds.

Originality/value – This article permits to understand the reality of what is and how to develop an IR, and the difficulties for researchers to insert them in the academic community, although France seems to be more permissive than others' contexts. It permits also to better know the French IR and AR research in management.

Keywords Methodology, Organizational change, Qualitative research

Paper type Research paper

1. Introduction

Action research (AR) is a set of neglected research methods compared to dominant methodologies in management science. The purpose of this article is to highlight the contribution of AR principles to organizational research, enunciated by Lewin (1946/1997), specifically addressing research in management science. It particularly aims to highlight how intervention-research (IR) research methods emerged in France, and have gained their identity and recognition in the French and international landscape in management research.

The analyzed research methods share a similar feature: the utility of management research criterion. In France, across Europe and also overseas, many researchers have questioned the scientific community about the strong tendency within management science to be out of touch with the companies' concerns and interests. This is damaging to companies or organizations and affects the experts' belief in research work (Séguin, 1996). There is now a significant gap between the expectations of entrepreneurs and the



proposals made by the academic community (Avenier, 1998; Savall and Zardet, 1997; Paturel and Savall, 1999).

France is characterized by a long tradition of AR. This is particularly due to the specificity of the higher education system and of management research organizational structures. Even if they differentiate, business and engineering schools partner with universities and other public higher education institutions. This partnership led to the first significant IR studies in management that emerged within engineering schools in the late 1960s, resting on a tradition of collaborative research with industrial sectors and government in the engineering science. This article will focus on one case of IR team, from a historical perspective. ISEOR (Institute of Socio-Economy of Enterprises and Organizations) is a French research team located in Lyon, financially independent of any national and international subsidies. Its founding project, in 1975, was to develop useful scientific research in management, funded by companies and organizations. ISEOR is positioned in the IR of management, and addresses simultaneously strategic, organizational, human and economic issues. It leads to the term SEAM: Socio-Economic Approach to Management.

The purpose of this paper is:

- *To define the original AR by major criteria:* Degree of research involvement, role of the researchers, role of studied participants, core audience, AR and metrics. There are significant differences in the common conception of AR and IR in management, originated in Europe, and more specifically in France in the 1960s.
- *To show how IR in management was developed in France:* The dynamism of the higher education and research institutes in France, probably unique in the world, and the research in management specificities in the universities; a development of IR in management in three major steps, through the creation of three pioneer research teams from universities and engineering schools, not from business schools.
- *To highlight the specific contribution of the ISEOR research team to AR and IR development, through an identity-forming and genuine methodological conception:* The socio-economic IR in management. We shed light on its key concepts and sketch a comparison with other major authors.
- Finally, to show the difficulties to be institutionally recognized in the academic sphere, in IR in management and their impacts on the researchers' careers. We suggest that national recognition of IR in France can progress when international recognition and notoriety are ensured at the international level by Anglo-Saxon countries.

2. What is AR?

As opposed to "hard sciences", social sciences do indeed recognize a distance between observable facts or objects and the theoretical speculations they develop. The modern philosophical hermeneutics (Gadamer, 1960), which is a theory about text reading, explanation and interpretation, gave rise to the interpretativist paradigm. This pattern was echoed in social sciences research, where the main research aim is to understand, to interpret, social actions and to explain the meaning they have for the actors (Geertz, 1973). This epistemological position implies a humble researcher position: how to successfully understand what he/she sees?

Organizational research is one of the scopes of application of the hermeneutics. Linstead *et al.* (2008) produced an interesting historical study of the organizational research over the

past 40 years. Since the 1970s, Anglo-Saxon research has dominated the field of organizational research and management. The French research organization theory is rooted in the sociology of work of George Friedman of the 1940s and 1950s (Linstead *et al.*, 2008). Some French researchers have never given the same importance as the Anglo-Saxons to quantitative research. They prefer resorting to case studies, field research, participant observation and clinical analysis rather than questionnaires. There is a desire to transform both the organization and society, from a liberal or radical perspective.

Organizational research has developed in different disciplines and particularly in social psychology, sociology and management sciences. In a somewhat simplistic approach of management sciences, we can distinguish between a mainstream dominated by quantitative methods and positivist paradigm, and a developing branch dominated by qualitative methods and interpretive constructivist paradigm. AR fits precisely in this second stream.

We identify a great diversity of qualitative approaches in organizational research, even by limiting our analysis to management sciences, through various criteria which we detail just after.

2.1 *The degree of research involvement*

AR is rooted in Kurt Lewin's works and in Aristotelian philosophy (Coghlan, 2011). AR is considered by Coghlan (2011) as a kind of scientific approach in the field of practical knowledge, by focusing on *how* knowledge is acquired rather than on *what* knowledge is acquired. This approach is based on *collaborative relationships* between researchers and customers. It aims to concomitantly solve problems and generate new knowledge (Rapaport, 1970). According to Lewin (1946/1997), trying to understand is not enough. Researchers have to try *changing* by involving actors in the change process to get better data and to impulse real change.

Lewin's death in 1947 was followed by the strong development of AR through the theory and practice of organizational development in the 1960s, 70s and 80s. Lewin directly influenced the socio-technical systems developed by the Tavistock Institute in the UK, the works in the workplace democracy in Scandinavia and Habermas' works (Reason and Bradbury, 2001). Today, AR covers a wide range of discourses and practices. Table I proposes a transorganizational development Gameboard elaborated by Boje and Rosile (2003) to put in place these methods (Table I).

Case studies, such as those based on the grounded theory, show a special feature compared to AR. The degree of commitment of both researcher and research is much lower. The study is subtle, but there is no deliberate interaction with the actors of the organization.

Thus, closely allied with the socio-technical approach, action-research aims to carry out in-depth observations through field work (Savall, 1975, 2010). However, in the original action-research approach, there seems to be no clear commitment by researchers to *changing* how the company or organization works, although this is more or less implicit as an objective. In addition, it is often thought of as a research method which aims especially to produce *contextual, contingent* knowledge without always aiming to develop reproducible knowledge models (Savall *et al.*, 2012).

The main difference between case study, AR and IR rests on the degree of commitment and willingness to support the company or organization in a transforming process. It seems higher with IR.

1. Alinsky/Cortez community organizing	2. Emery PDPD (Participative Design for Participative Democracy); search conference	3. Davis and Weisbord Future search conference; Sociotechnical systems models	4. Savall SEAM (socio- economic approach to management)	5. Argyris, Torbert, Reason AR/science/inquiry
16. Collins Critical theory sociology OD	<p><i>TD Gameboard</i> (website: http://web.mnsu.edu/dboje/Tdgameboard.html) <i>David M. Boje, Ph.D.</i> <i>New Mexico State University</i> <i>September 16 1999; Revised July 15 2002</i></p>			6. Cooperider and Srivastara and Gergen Appreciative inquiry
15. Chisolm Network organizations				7. Hammer and Champy Reengineering
14. Boai; Boje, Rosile and Saner Postmodern theater (Aristotle and Burke organization IS theater approach)				8. Goofman Frameworks (metaphoric approach to theater)
13. Debord; Best and Kellner Spectacle theatrics	12. Culbert <i>et al.</i> (1972); Boje, Wolfe and Motamedi; Cummings Transorganization development	11. White and Epton, Barry; Boje and Rosile, Kaye, Boyce Restoring and narrative therapy	10. Senge, Schein and Boisot Learning organizations; knowledge networks	9. Owens Open spaces

Source: Boje and Rosile (2003)

2.2 Role of researchers

As for case studies, the role of researchers is to produce a piece of knowledge through description and comprehension, with short periods of observation in the field. In AR, researchers conceive their role as collaborative in the service of democracy. It was a political project in the stream of committed research, oriented toward workers and employees rather than to management or staff members. In IR, stemming from the French tradition of social psychology: the researcher is involved in an organizational survey while retaining his/her academic identity, his/her ethics and his/her project (Hatchuel and David, 2008).

2.3 Role of study participants

In the case study, the study participants are qualitative information and data suppliers, without embarking on any kind of deliberate interaction. AR was initially oriented toward organization actors, to work with them to elaborate new operating rules, but a new research paradigm was introduced in 1981 by Reason and Rowan, in which AR is seen more as a research *with* the actors rather than a research *on* or *for* them. It highlights the specificity of each situation, which may lead to put too much emphasis on the contingent dimension (Coghlan, 2011).

In IR, the corporate participants play a different role: they become co-producers, with researchers, through cognitive interactivity (Savall and Zardet, 1996; Cristallini, 2005). They are “*ordinary savants*” (Girin, 1990, p. 10). Intervener-researchers immerse themselves into a company or organization, quite the reverse of “neutrality”. “*It is essential to assume that observations are skewed and far from the logic of control groups*” (Moisdon, 2010, p. 217). The geopolitical position of intervener-researchers is essential: the best analogy is a mountain, with its slopes and its peak. To adopt a comprehensive analysis, they need to work with a large range of actors, CEO, managers, workers, employees, staff, line and so on. Organizational participants thus play several roles: they are co-producers of knowledge, contributors of information, co-appraisers of the research and consumers of knowledge as end-users. Confidence, ethics and effectiveness are at the center of the IR process and the relationship between corporate participants and researchers.

2.4 Core audience

Core audiences vary: in a case study, it is really the academic community who represents the core audience for researchers; in AR, initially, organizational participants constituted the core audience, but there are now significant signs showing that both audiences are targeted. For example, several academic reviews exist (AR, *International Journal of AR, Concepts and Transformation, Action learning: Research and Practice* and so on). Finally, in IR, since its birth, both audiences have been equally important.

2.5 AR and metrics

Both AR and IR in management are often classified in the family of qualitative methodologies. However, this is an approximation because these methodologies give access to multimodal qualitative, quantitative and financial data (Krief and Zardet, 2013). In a historical communication devoted to the difficulties of processing data emanating from participants in organizations for scientific use, Savall (1986) highlighted the interest of using three types of information: qualitative, quantitative and financial.

Table II seeks to identify the main features of these three methods to conclude this brief overview of the research methods used in management and considered as

Types of methods Criteria	Case study	AR	IR
Definition	In-depth study of a category of phenomena that has benefited from previous theoretical development, studied in real-life context Concise research report describing an enterprise's situation	Consists in preparing a group for change through objective social observation Born of the meeting between a research intention (researcher) and a will for change (enterprise)	Interactive method with a transformative aim between a researcher and his/her research field
Dominant Methodological approach	Descriptive DESCRIBE + COMPREHEND/LIMITED PERIOD INSIDE THE ENTERPRISE	Comprehensive DESCRIBE + COMPREHEND/EXTENDED PERIOD INSIDE THE ENTERPRISE	Comprehensive DESCRIBE + COMPREHEND + PARTICIPATION + TRANSFORMATION? OF THE ENTERPRISE
Objective	Discover new problematics Illustrate a phenomenon Suggest hypotheses Verify hypotheses using situations of organization or cases of enterprises Identify evolutions over time by a longitudinal study	Render phenomena intelligible through and for action Invent new management frameworks Describe and comprehend a management situation	Help company actors in the field to design and implement adequate management models and tools in reference to predefined, specific problematics Research on contingent methods of organizational transformation
Status of the knowledge produced Researcher's position with regards to the studied object	Substantial Specific Illustrative Ambiguity of the researcher, dependent on data supplied in the field, not truly independent of the studied case, while claiming an exterior position Contemplative attitude most often: the researcher does not organize the interaction or stimuli with the object, under the influence of his/her quest for neutrality	Substantial Specific Contingent Purported neutrality toward the actors' and the organization's stakes Cooperation between researcher and organization. Researcher's presence and its consequences are explicitly taken into consideration, not as "bias" that should be eliminated, rather as the very principle of knowledge generation Beyond participative observation or not: experimenter's role and change is reputedly contextualized	Procedural Specific Contingent Beyond participative observation Aid in implementation of change in the organization Co-production of dominantly comprehensive knowledge, between researchers and company actors Alternation between immersion and distanciation
Examples	Studies by Ph. Woot (1984) Bauer (1981) Yin (1994)	Research work carried out at the Tavistock Institute in the 50s et 60s—Lewin (1951)	Le Centre de Gestion Scientifique (Ecole Supérieure des Mines de Paris)
Modelization - Essence - Intensity - Transparency	Qualitative Low Not completely explicit	Qualitative Low Not completely avowed	Qualitative Moderate Not completely explicit

Table II.
Comparative table of the principal qualitative methods

Source: Savall and Zardet (2011)

field-oriented approaches. Although there is little semantic stability about these three methods, we consider that a case study is a descriptive and understanding analysis of an organizational management situation, without any specific feature in terms of interaction with the field compared to deductive methods. AR can be construed as a method implemented with actors in the field with a corporate democracy development spirit. AR is described as an *enlightened and democratic “model of action”*. For Hatchuel and David (2008), AR does not focus so much on management models validated out of context. As for IR, it refers to interactive methods where the researcher plays a committed role while working with a variety of actors from top to bottom.

IR and AR do not use the same type of collaborative methodology. AR key principles do not define so much a research program than an idealistic action model. A central assertion of the AR is that if the researcher increases participation and involvement, he/she encourages the practitioners’ reflexivity and personal development. There is a strong belief that the pursuit of humanistic values in organizations is a major lever of organizational motivation and performance (Hatchuel and David, 2008). AR is described as an *enlightened and democratic “model of action”*. There is no major contribution of AR to management models validated out of context (Hatchuel and David, 2008).

The research themes are another criterion to differentiate them. Stemming from social psychology, AR is strongly rooted in organizational development (OD), human relations, working conditions and professional behavior issues. The case studies are present in all of the disciplines of management sciences, as soon as a holistic rather than an analytic perspective is required. IR is very often implemented in change strategy contexts (technological, human, organizational, strategy, etc.) to accompany organizations in their metamorphosis or to help them to implement its management models or tools, through an interactive process between organizational actors and researchers.

3. Development of IR in organizational research in France

In France, the discipline of management sciences is young. It was recognized from an institutional point of view in 1974 by the creation of an autonomous section within the body of academics in French universities. Hitherto, management sciences were attached to economic sciences in a business administration subset. The first external aggregation (a national competitive exam) in higher management sciences studies was held in 1977. In line with the French long tradition of mathematics education, an engineering vision has emerged in research in the late 1960s through the creation of two research centers in Paris, the Centre de Gestion Scientifique of the Ecole des Mines and the Centre de Recherche en Gestion of the Ecole Polytechnique (Berry, 1995a; 1995b).

France has some specific features that help to understand in which context some very original research has been developed for more than 40 years. It is a system of dual higher education and research, as we find on one side a university and research *public* system, and on the other the “*Grandes Ecoles*” which are public, private or consular, i.e. dependent on chambers of commerce and industry. Management sciences in particular have a specificity related to the institutions dedicated to management teaching and research; our top engineering schools have developed research in administration and management in partnership with companies or organizations (Berry, 1995a; 1995b).

The recruitment system in France in public higher education has some specific features in terms of centralization. Davoine and Gmür (2012) made a comparative study on human resource management research in France and Germany. They insisted on

French special features of management science as a discipline. More than the academia pattern, engineering schools were the prime example of management education in late nineteenth century. French business schools followed the same kind of pattern. Much later, during the 1950s, the institutionalization of management education was promoted in the universities by Professor Pierre Tabatoni (Gemelli, 1996). Back from Harvard University, he created, with Gaston Berger in 1955, the first IAE (Institut d'Administration des Entreprises) along with a teaching community in management science in the universities.

Davoine and Gmür (2012) also underline the extreme hierarchical organization of French scholars, compared to Germany. The French teaching community has many different categories, ranks and positions. Altmann and Bournois (2004) suggested the “coconut tree” metaphor to express the highly centralized career management system at the national level. This national level is represented and managed by peers who are placed at the top of the coconut tree. This system has replaced the pre-nineteenth-century traditional chair system when professors were usually supported by teaching assistants. The commonly used “coconut tree” image comes from the position of its leaves: the career system has a tree trunk with leaves that are always one on/under the other. This characterizes the hierarchical system.

According to Altmann and Bournois (2004), here are the main features of French academia career system:

- Everything starts when the PhD dissertation is defended. The candidate is awarded a grade (“pass”, “good” or “very good”). The dissertation supervisor and the committee reputations are also important in the candidate’s career success.
- *Those among new doctors who wish to be hired as lecturers within the French public academia need to follow a two-stage recruitment process:* A 36-peer national selection committee (“Conseil National des Universités”) examines the candidate’s scientific records and allows him/her to submit lecturer candidacies through a five-year “qualification”. Once the candidate gets it, he/she can apply to the universities that offer vacant lecturer positions. Recruitment interviews are carried out by a commission compounded of both local-internal and external peers.
- *Each university has to release its recruitment and selection process results at the same time:* No more than five top candidates. If the candidate is in first position in several universities, he/she can choose which one he/she prefers. If not, he/she has to wait for the first-position candidates to choose their institution. Around 120 to 150 lecturers are hired every year in the French universities.
- During his/her career, the lecturer gets salary promotion according to an automatic system based on years of service, and his/her individual initiative based on research and teaching innovation achievements, and institutional involvement. This second kind of promotion is also managed at both national and local levels. In very few disciplines (five in France), getting a tenure track follows a competitive national “aggregation” process with three oral test presentations. If the lecturer passes those tests, he/she becomes a tenured professor, and is assigned to a university. In most cases, the new professor has to move to another region of France for at least three years. This competitive examination is hard to pass, particularly for women. Women embody mostly lecturer positions, with no more

than 15 per cent being tenure tracks. Other more attractive systems to become a tenure track are currently emerging (Altmann and Bournois, 2004).

- The French salary system for lecturers and tenured professors follows the same standard for all scientific disciplines in French universities. Whatever the city, the purchasing power, the university fame and the lecturer-professor expertise, no one has room to negotiate salaries. Moreover, the salary is quite poor comparing to French private business schools, although the university teaching load is weaker for a university scholar, than for a business school scholar. At the beginning, lecturers earn €2,100 monthly salary for 192 teaching hours, and other research and administrative activities. At the end of his/her career, tenured professors can earn up to €6,100 monthly salary with same workload requirements.

A significant amount of scholars teach in private business schools. These institutions have another salary and career management system, which is more like a traditional employment market. Each business school hires the wanted and directly selected lecturers and professors. They can have free negotiation of their compensations and benefits. However, business school scholars are more required than before to do research and to publish in top academic journals, as these institutions have to be certified (AACSB, EPAS, AMBA, EQUIS, etc.) and the private degrees must be nationally authorized by the French state according to these criteria.

The dominant and implication-filled standards defended by the French academic community are a primarily academic and bibliographical research, a clear prevalence of the hypothetico-deductive models and a clear preference for English-language literature to the detriment of French-language works (Linstead *et al.*, 2008).

The scientific interest in the study of organizations emerged later in France compared to the USA or the UK. During this time, the Anglo-Saxons imposed their vision, methods and language in foreign work. But French speakers were well-armed to resist the steamroller through linguistic difference, tradition of intellectual richness and also socio-historical differences that helped maintain a relative autonomy of French speakers in France and in Quebec. Although French works have rarely known a large diffusion, many French works are in line with Anglo-Saxon approaches, often outside of the mainstream. They adopt a broader and more political perspective when dealing with concepts like corporate social responsibility, ethics and more emphasis on social variables (Linstead *et al.*, 2008).

We can identify three phases in the development of French IR and AR.

3.1 *The pioneers: Phase 1, 1970s-80s*

IR has emerged in the Centre de Gestion Scientifique (CGS) (Moisdon, 1984; Hatchuel and Molet, 1986; David, 2000). The CGS creation in 1967 was aimed at teaching management to engineering students of the École des Mines de Paris. For more than two centuries, this school has had a tradition of intellectual cooperation with state administration and private companies (Hatchuel, 2000; Hatchuel and David, 2008). Founded in 1967 by Claude Riveline, the CGS had been directed for many years by Jean-Claude Moisdon, and then by Daniel Fixari. The early years of CGS have been marked by operations research, studies on decision taking and cost analysis. In the 1970s, the operations research crisis led to a redefinition of the research areas of the CGS. A new academic program has gradually emerged, including a critical perspective on the

mainstream of international management research, which did not apply management research to the economy or sociology fields (Hatchuel and David, 2008).

Subsequently, the Centre de Recherche en Gestion (CRG), École Polytechnique, was created in 1972 by Bertrand Collomb, who graduated from the same high school and CEO of a famous French company, followed for many years by the direction of Michel Berry and then by Jacques Girin. Like the CGS, it has about 20 members and 15 doctoral students, most of whom are engineers who graduated from the École Polytechnique. In contrast, in the USA and UK, economics and psychology have played a dominant role in the mainstream of research on management (Linstead *et al.*, 2008).

How to explain the almost simultaneous birth of these three teams, CGS, CRG and ISEOR? We can make some assumptions. The concomitant creation in Paris, capital of France, of the CRG and of the CGS, both from engineering schools among the most famous in France and worldwide, probably matches a serious awareness of the French elites – leaders of major industrial groups, administrators and politicians with high responsibilities – and a few years after the political events of 1968 regarding the conditions of employees' working life and the lack of consideration of the human and social dimension of the professional activity. This collective awareness has probably encouraged our colleagues, creators of these centers, to design research and teaching that include human, sociological and organizational dimensions that were previously dealt with by engineers through the only technical angle. The project of the founders was to enrich models called rational economic decisions by psychological, sociological, organizational and political variables. The pioneers of these organizational and institutional innovations, Claude Riveline (CGS) and Bertrand Collomb, senior officer from the *École polytechnique* (CRG), are emblematic.

The ISEOR is an autonomous self-financed research center, founded in 1975, with the initial support of two higher education institutions, the Lumière University in Lyon specializing in social sciences and a business school, the École Supérieure de Commerce de Lyon (now E.M. Lyon). The founder of ISEOR in Lyon, 500 km from Paris, Henri Savall, knew little about the founders of CGS and CRG, and the creation of ISEOR sprang from a different logic. Indeed, Henri Savall, unlike his colleagues Riveline and Collomb, engineers, has a varied background in the social sciences: economics, politics, philology, management, accounting and finance and sociology. The origin of ISEOR comes from the awareness by this scholar of the limits of micro and macroeconomic models for decision making, leading to imperfect rationality criteria and to a very inadequate or absent consideration of the human and social variables. However, at the same time, some famous researchers, especially in the second half of the twentieth century, developed a new methodology based on AR, such as in Norway and in The Netherlands, where some experiences of the world-famous semi-autonomous teams were conducted in companies and marked the AR movement, but without economic or quantitative analysis. Henri Savall was also influenced by these North-European socio-technical innovative experiences, in particular the job enrichment and the work of the Tavistock Institute (Emery, 1969; Emery and Trist, 1965).

The Fondation Nationale pour l'Enseignement de la Gestion (FNEGE) was created in 1968. Its mission, since its origin, is to promote and increase the quality of management education in universities and business schools. Henri Savall was an expert for the FNEGE for five years to implement management training in the model SEAM, for French management professors. In 1975, l'Agence Nationale Pour les Conditions de

Travail (ANACT) was created to promote the working conditions improvement in companies, and Henri Savall was in charge, during two years, of training seminars for companies' top management specialized in SEAM model. Both institutions helped to initiate and to support the creation of ISEOR, developing relationships with top managers who accepted to experiment with the SEAM model in their company. We can also assume that his multidisciplinary education, starting with inductive pedagogy since the primary school, called the Freinet method, led the author to a transdisciplinary reflection, and to his PhD dissertation in economics (Savall, 1975/1981), as well as extensive training in accounting. He became aware of the contradictions, the dead ends and the gaps between the economic dimension of the phenomena and the other human and social dimensions. We can consider that the creation of SEAM roots in a desire to develop a transdisciplinary representation of the observable social phenomena, especially in the organizations.

The methodological and epistemological convergences of these three teams relate to the importance attached to the scientific observation of management practices or situations, focused on the management instruments used by corporations and organizations. The objective is to better understand their intimate operation by interactive research whereby the researcher fully assumes his committed position. Without dwelling on the research objectives of these three teams, which have some differences (Savall and Zardet, 2011, pp. 370-384), the fieldwork procedures adopted by all are very similar. However, the CGS and the CRG have easier accessibility to corporations due to the reputation of the institutions to which they are attached, their mathematical modeling skills and their networks of graduates. The research protocols enabling quality control of the IR process are essential for all three teams, with practical methods adapted to each situation.

In the three teams, *teamwork* permits exchanges of viewpoints, interpretations and analyses. IR requires protocols for cognitive and emotional distancing. Work protocols are essential in laboratories to ensure depollution with respect to fieldwork and better decode situations (Grin, 1990). It is also for reasons of skills that IR is carried out by teams of researchers with a graduated skills hierarchy – from experienced researchers to young researchers working on their doctoral dissertations. These practices in fact are like olden-day trade-guilds, giving hands-on training to young researchers.

3.2 The structuration: Phase 2/1980s-2000s

The three teams developed their research and trained many researchers. However, the CGS and the CRG tend to work with large companies and administrations (e.g. Hospital of Paris, Renault), while ISEOR worked rather in very small, medium and “intermediate” companies, as well as administrations in various countries of Europe (Belgium and Switzerland). In the same period, some researchers joined this stream of IR, in particular Detchessahar, Plane and Nobre.

During this Phase 2, the three research teams, the CGS, the CRG and the ISEOR have developed a regular collaboration, through shared seminars several times per year, to exchange about their respective research methodologies, about the way to find companies and to negotiate the access to the field and also about the operational protocols of their team-work. In the same period, the Fondation Nationale pour l'Enseignement de la Gestion des Entreprises funded many post doc grants during several years for French researchers to go to North American universities. French university research was at that time more focused

on the North American mainstream and research was developed far away from the French company field. This situation brought a serious handicap for ISEOR's younger researchers to get access to institutional recognition and to university positions. By contrast, the CGS and CGR teams, integrated in engineering schools and linked with big industrial corporate companies, have not met the same difficulties of institutional recognition and career progression for their members. During this Phase 2 for example, some CRG's researchers have been integrated in the *researchers corps* of the Centre National de la Recherche Scientifique.

IR implies the frequent presence of researchers inside the company or organization to carry out systematic observations of the management situations (Buono and Savall, 2007). This is why researchers have to be very committed to the research strategy and co-build knowledge with the participants observed. Research implies publication. The freedom of researchers is increased by observing a rule that the organizations remain anonymous in the publications by maintaining discretion, thus they get easier access to strategic or confidential data. The basic company assignment only represents the visible face of the IR iceberg (Nobre, 2006). The wide range of issues that emerge during IR missions can give rise to different publications. IR provides sets of research themes and problems corresponding to the centers of interest of companies and organizations concerned. The difficulty is due to the fact that the holistic approach to companies and organizations by IR is not easily compatible with the current requirements of the reviewers of contribution to scientific publications, which expect extremely specific research questions and assumptions.

3.3 Institutionalization/dissemination: Phase 3, from 2000s onward

IR specialists now belong to research evaluation commissions: doctoral and post-doctoral research founded on IR is gradually accepted by research evaluation commissions like the national universities council (CNU – Conseil National des Universités), university recruitment commissions and, to a lesser extent, by the French national center for scientific research (CNRS – Centre National de la Recherche Scientifique). Unlike other countries, the historical affiliation of management sciences to economic sciences was a handicap for recognition and involved a relationship of sometimes fierce competitiveness between management scientists and economists within universities and research institutions such as the CNRS. Very recently, the national authorities of evaluation (AERES, CNU) started to recommend, under the pressure of reduced public funding, to develop *contractual research*, still not very common in management science.

Finally, if we compare research in France with Europe and the USA, we find some factors which have facilitated the introduction of this kind of methodology in the French landscape through the institutional management science framework in France – top business schools and top engineering schools. These historical factors have however undergone change. Thus, research in business schools insidiously, but clearly, veered toward publications in the “major” international English-language reviews (Berry, 2009; Coghlan, 2011), where academia clearly triumphs over interactive research based on *rigorous observation*. One of the obvious reasons is the certification of business schools by EPAS, AMBA, EQUIS labels in Europe and AACSB in the USA, for which one of the main selection criterion is the number of articles published in reviews ranked in international classifications.

4. Contribution of ISEOR to AR and IR development: the socioeconomic IR in management

At its foundation, the purpose of ISEOR was to develop management research in the economic evaluation of working life conditions and its impact on organizational performance. The starting point was socio-technical AR (Emery, 1969) and its critical analysis (Savall, 1975/1981; Boje and Rosile, 2003). The initial project was clearly to create a research center based on IR methodology, to build both theoretical and actionable knowledge about human behavior and the efficiency of intangible investment in qualitative human resource development, related to corporate economic performance. This theory, called socio-economic theory of organizations, or hidden costs and performance theory, is disseminated in the USA as “SEAM”, i.e. socio-economic approach to management (Boje and Rosile, 2003; Buono and Savall, 2007; Hayes and Lepisto, 2007; Sorensen and Yeager, 2010; Conbere and Heoriadhi, 2011; Gephart, 2012).

The IR program was oriented in two directions:

- (1) demonstrating the conditions of compatibility between social and economic objectives of organizations; and
- (2) identifying the conditions of success for socio-economic organizational strategies that firmly integrate HR policy into their overall policy.

It was carried out by 585 researchers under Savall and Zardet’s monitoring. The findings have been published in numerous articles, papers and books, in French, English and Spanish, and in 125 PhD dissertations. They demonstrate the erroneous character of some mainstream theories that continue to top the management science “box office” in business schools, such as economies of scale, job hyper-specialization or strategies of domination and technology-oriented. These theories are questioned by the theory of hidden costs and performance.

4.1 Evolution of ISEOR

The four-decade socio-economic IR program shows a gradual evolution in concepts, through an abductive methodological approach of cumulative research on organizational and management analysis.

In the 1970s, ISEOR’s purpose was to ground research in close observation within organizations, to identify and evaluate the hidden costs of dysfunctions. A typology was produced under five main headings: absenteeism, occupational injuries and diseases, staff turnover, non-quality and direct productivity gaps. The hidden costs are due to informal power of the organizational actors which interact with the enterprise structures.

In the 1980s, ISEOR created a model aimed at converting hidden costs into value-added and creation of potential, so-called Horivert, i.e. horizontal and vertical change management architecture, to process socioeconomic IR. Many full-scale experiments in medium-sized and corporate subsidiaries carried out the design and test of six major innovative socio-economic management tools:

- (1) internal/external strategic action plan;
- (2) priority action plan;
- (3) competency grid;
- (4) time management;

- (5) strategic piloting logbook; and
- (6) periodically negotiable activity contract.

In the 1990s, the IR was focused on strategic management intervention engineering, applied to large companies and its replication in many medium-sized firms. The dynamic model of change management was shaped with three axes: improvement process, management tools and strategic decisions.

From 2000 onward, the scientific program included an original research program for society and companies on the tetranormalization phenomenon which was discovered through strategic management IR as an additional cause of new dysfunctions and hidden costs in organizations. The concept of tetranormalization refers to the four main groups of norms and standards which regulate the most important areas of social and economic activity: trade (World Trade Organization); labor conditions (International Labor Organization); accounting and finance (International Accounting Standards Board, International Financial Reporting Standards); quality, security and environment (International Organization for Standardization). Citizens, consumers, producers and employees need norms and standards. However, public and private institutions compete and lobby to ensure adoption of “their” norms. Thus, norms are not only healthy rules of the game and a factor of fair trading, they have a hidden face because they can be used as barriers to prevent entry to markets and can lead to the restriction of free and fair trade. This program is carried on by a network of 30 research teams in 11 countries and coordinated by the ISEOR.

Socioeconomic IR is now aimed at bridging the organizational level of analysis and research, and the macroeconomic and societal level. This coming back from early economic research on the theory of crisis (Bernácer, 1922), which started in 1965 at macroeconomic level (Savall, 1973, 1979; Savall and Zardet, 2013), shows that bridging different levels instead of specializing different disciplines, such as psychology at individual level, HR and strategic management at organization level and economics at macro level, generates new knowledge on social and economic phenomena through a holistic-oriented approach.

Many publications, books, articles and communications in congresses were performed from 1974 in France, 1977 in Spain, 1981 in the USA with many papers in the Academy of Management conferences starting in 1998, and Latin America in the 2000s. Today a dozen books have been published in the USA in English, French and Spanish. The international relations that ISEOR researchers have gradually built with colleagues in many parts of the world have validated the fact that the scientific and functional model created by the ISEOR research center is universally applicable (Boje and Rosile, 2003; Buono and Savall, 2007).

4.2 ISEOR IR approach

Since the 1970s, Anglo-Saxon research has dominated the field of organizational research and management. Apart from a few exceptions, French works have been rarely accepted as valid. However, many French works are in line with Anglo-Saxon approaches outside of the mainstream. They adopt a broader and more political perspective when dealing with concepts like corporate social responsibility, ethics and more emphasis on social variables (Linstead *et al.*, 2008). To strengthen the concept of theory-in-use of Argyris and Schön, some authors propose the notions of contextual theory-in-use (CTU) and established theory-in-use (ETU). A tension between CTU and

ETU testifies to exploit potential in management research (Hatchuel and David, 2008). According to the CGS researchers, IRM is appropriate when the researchers are in a logic of discovery, not in an ex-post or a confirmatory validation logic. The reason is that they do not aim to build a new management theory, unlike ISEOR researchers (Savall and Zardet, 2004, 2011). Boje and Rosile (2003) quote:

Unlike AR, the basis of other TD methods, SEAM uses qualitative data gathering (not survey research) in combination with quantitative financial studies. Péron and Savall (2001) sound rather critical vis-à-vis AR for apparently carrying out some field observations, without any desire on the part of researchers to commit themselves in the running of the firm or meddle with the company's stakes [...] Savall has a critical approach based on psychoanalytic, sociology and politics theory of decisions, taken according to economic rationality models marred by mistakes due to hidden costs neglected in decision making.

The specificities of qualimetrics IR, as conducted by ISEOR, concern, in particular, the methodological protocols replicated in a number of companies and organizations, the management tools designed following IR projects and gradually incorporated into new IR projects, a major preoccupation to incorporate qualitative, quantitative and financial analyses (Savall, 1974; Savall and Zardet, 1987, 2011; Boje, 2004) in field investigations and assess the organizational performance effects of IR projects with the same criteria.

Some characteristics are the same as the principles of AR, as highlighted by Fricke (2011) and presented above. But our methodology does insist on fieldwork and on solid qualitative, quantitative and financial information. Organizations are also a place where knowledge is co-produced by researchers and organizations actors, as equal research partners. ISEOR IR concept has similarities with interpretative sociology, born from phenomenology philosophy (Savall and Zardet, 1996).

There are common characteristics between ISEOR IR concept and medical research. The treatment of pathologies is an integral part and each new treated case contributes to knowledge about a disease; thus, in this case, applied research leads to “pure” or generic research and both are complementary. The same data are used to “cure” the patient and advance medical research. Therapeutic and drug administration research methodologies are extremely precise. As a result, doctors and nurses naturally contribute to research while engaged in their activity at hospital. There is high congruity between professional and scientific purpose, particularly in teaching hospitals. Since 1959 in France, according to Debré reform, the statute of university professor has been mixed with that of hospital practitioner as so-called “university professor – hospital practitioner”. Some authors suggest the statute of “university professor – management practitioner” (Perez, 1982).

Another specificity of the ISEOR concept of IR is its research self-financing model. Even if many organizations in France still consider that research in social sciences should be free because it should be financed by public authorities, a socioeconomic IR contract has a service dimension, following the proverb that “something priceless is worthless”. Thus, the organization expects to receive the services defined in the specifications for the fee it will pay. Fees are essential, as they ensure both an in-depth involvement of the organizational actors in the IR process and funding the intervener-researcher jobs. The negotiation process of an IR has important specificities, which condition its success. It requires successive iterations – a minimum of three or four meetings – initially with an introducer then with the CEO. A negotiation usually takes about six months. The listening phase is very important to identify the organization expectations. The negotiation phase dissociates two topics: specifications and negotiation of fees. Unlike

consultancy missions, the contents of an IR comprises non-negotiable elements about methodology which have to be explained to the organization, such as interviews with shop floor workers and Union representatives, the feedback presentation (mirror effect) to all the people interviewed. If there is no agreement on these key criteria, the negotiation is stopped because the researchers consider that the conditions needed to bring the mission to a successful conclusion will not be met. This researcher's independent attitude is a key difference between IR and professional consultancy.

One of the major difficulties in longitudinal research concerns the traceability of results. Thus, to generate distributable knowledge, it is advisable to set up rigorous and homogeneous work protocols between researchers. For example, the quality and exhaustiveness of field note quotes taken during the many working sessions in the organization, the production of intermediate research documents and the collection of documents produced by the organizations are obligatory protocols. The collection of information is fundamental in socioeconomic IR, as its conservation must be structured and accessible to everyone in the team. Indeed, shared protocols are essential to capitalize on information, data and findings. The principle of *generic contingency* is essential in the IR carried out by ISEOR, to increase cognitive interactivity with organizational participants (Savall and Zardet, 1996). Contingency expresses the pre-eminence of the specificity of each organization. The generic character expresses the finality of the scientific intention of the work, i.e. communicable knowledge (Krief and Zardet, 2013; Savall and Zardet, 1996; Voyant, 2005). This is how an IR program permits cumulative research, transverse analyses, for example, per sector or theme set which will be implemented several months, several years and even several decades later thanks to this clinical material, provided that it is obtained by using homogeneous protocols. Today, ISEOR has an extensive knowledge database compiled over 38 years from 1,310 companies or organizations in 73 different lines of business and 37 countries in Europe, America, Africa and Asia. Many scholars from the USA, Canada, Mexico, Spain and other countries visit ISEOR for sabbatical periods of joint research and publications.

4.3 Gradual national recognition and growing international reputation of ISEOR and IR methodology in the academic world

According to Hatchuel and David (2008), management research is not a common commitment for companies. IR methodology may only be run within organizations that authors call "management pioneers", so the ISEOR has found 1,310 of them who have recognized the relevance of socioeconomic IR and funded the research. Boje and Rosile (2003), who have developed a close partnership with ISEOR, consider that "researchers act as committed facilitators, participants and learners rather than distanced neutral observers, analysts or manipulators" (Arieli *et al.*, 2009).

AR brings experts and researchers closer together. One of the conditions of this reconciliation consists in identifying, through previous discussions then during the IR process, the organizational issues, both contingent and generic, to define sets of research themes relevant for researchers and practitioners. Indeed, the gap has grown over the past 30 years between the expectations of organizations and the questions addressed by researchers. Concerned about this situation, the French National Management Teaching Foundation (FNEGE) took the initiative, in 2012, to conduct a national survey whose results are expected. The survey consists of asking companies to express their major recurrent concerns and problems to compare them with those, which are addressed in

French PhD dissertations. ISEOR has been involved in the taskforce, as well as scholars from five universities and business schools, the General Delegate of FNEGE and the President of the Conseil National des Universités (CNU) (Lamarque, 2013). This institutional initiative in France is very new and means a new trend in future relationship between academics and practitioners spheres.

From 2001, the ISEOR has organized international conferences in Lyon, 11 with the partnership of the Academy of Management and three transatlantic congresses on Audit and management control in partnership with the Latin American and European International Institute of Costs (IIC) and the American Accounting Association (AAA). In all, 40 per cent of the papers use AR, IR, qualimetrics or qualitative methodologies.

Publications in IR centers pose an ethical problem: how to guarantee certain equity between those who do research on the field in organizations and those who write articles based on their work? The principle of a collective production is possible provided that strict ethical game rules are defined and complied with. As IR means a team effort, the consequence is that publications must be a collective effort too. The difference is that publications are only one of the forms of “production” or “result” of researchers (Berry, 2009), who also co-produce inside companies and organizations other kinds of results in the form of “subterranean” or “grey” publications (IR reports, notes, abstracts, etc.) and intangible improvements in management practices, professional situations and related performance.

The transfer of new knowledge from research to teaching has two main values:

- (1) improving teaching by updating and testing; and
- (2) disseminating innovative concepts, methods, tools to future management practitioners.

The ISEOR scholars created in 1997 the University School of Innovative Management (EUGINOV) now within the Institute of Business Administration (University Jean Moulin Lyon 3). It includes coordinated training programs leading to university degrees. This school proposes an original offer in management, based on an interactive pedagogic approach, alternating part-time seminars and part-time practice in a firm or organization. This program includes managers taking part in continuing education program, as well as young students involved in initial learning curricula.

The ISEOR researchers are now disseminated in 37 countries; most of them are active members of the international network. Sixty-five per cent of PhD prepared in the Institute is academics: 11 are tenure professors and 30 are associate professors in French universities; 40 are professors in Latin American, USA, Tunisia, Lebanon and other European and African universities. Other doctors or junior researchers are now practitioners in companies or public organizations.

5. Conclusion

This paper aimed to acknowledge and highlight how AR and IR in management were developed in France. It is an original means to develop research that aims simultaneously at developing scientific knowledge and competencies in business and organization analysis and development services. Referring to the three main objectives in our introduction, we summarize the findings of this paper as follows:

AR has a consensus neither on definitions nor on contents. We defined it as an in-depth research within organizations, historically developed in different disciplines, such as social psychology, sociology or management sciences. AR is originated in qualitative and

interpretative research, often relying on the constructivist paradigm. From its origin to the present day, AR is positioned in the practical knowledge field, founded on collaborative relationships between the researcher and the research client. AR's challenge is to change professional relationships and work structures. However, today, there are many forms of AR, as highlighted by Coghlan (2011). IR in management is part of the AR extended family, but differs by the deliberate commitment and involvement of the interveners-researchers within the companies and organizations. AR and IR core audiences are various: the academic community and practitioners from companies and organizations.

We focused our analysis on IR in management in the French context. Three pioneer teams were created in 1970-1980: the CRG, the CGS and ISEOR. They have relatively different vocations but share a common founding objective: to match and bridge the gaps between researches in economy, in finance, in mathematics and the humanities, social and organizational researches. The three teams partnered in their researches during 15 years (1980-1995) and still have special relationships, such as thesis directions and mentorships or in the organization of academic conferences. The three teams operate in a very specific institutional environment in France, characterized by a duality between private business schools and public universities in management.

Among ISEOR's specificities, its scientific project is to create and to implement within organizations concepts, tools and methods to improve their socio-economic performances. The original concepts are the pillars of the ISEOR model: dysfunctions and hidden costs – performances. Since its creation date in 1975, the key concepts have evolved, as well as the scientific program of ISEOR: how to identify the dysfunctions and the hidden costs in the companies and organizations? (1970s); then, how to convert the hidden costs into value added creation and potential creation, thanks to a collaborative work and to the socioeconomic management tools adapted to each company? (1980s) In the 1990s and 2000s, the scientific program integrated new issues that emerged from the partnerships with the companies and the organizations: Tetranormalization (Savall and Zardet, 2005) on one hand, and on the other hand, the transorganizational performance of networking companies and organizations. A major specificity in the ISEOR research work is probably the importance to systemically incorporate qualitative, quantitative and financial variables in the IR method and analysis.

Making AR or IR in management is a challenging strategy for researchers, especially in France in the context of the public universities. Indeed, those methodologies are considered as enrooting in a consultant work rather than in a researcher's work, and the time allotted to field work is so important that there is less time left for writing and publishing. However, it is possible: more than 500 researchers hold today a French doctorate degree and 40 per cent of them, in the case of ISEOR, are teachers and researchers in French or foreign universities and business schools.

Our personal conclusion is that this "new" research methodology (50 to 60 years) is an intervention form in social sciences, and it is well-known that, in every scientific field, an invention or a major innovation needs at least an entire generation to move from marginal to a pioneer image, contributing to the progress of scientific knowledge and to its practical implication by the knowledge users: the companies and the organizations.

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