CRITICAL APPROACHES TO QUALITATIVE RESEARCH

Thomas Greckhamer

The major assumptions and basic sets of beliefs about the world held by researchers shapes the social and organizational research they conduct (Burrell and Morgan, 1979; Guba, 1990; Morgan and Smircich, 1980). Accordingly, our understanding of organizations is enriched by applying various theoretical lenses that build on different assumptions in order to uncover different dimensions of organizational life and of organizations’ impact on their members as well as their environment (Morgan, 1986). Critical approaches are a vital aspect of this variety of theoretical lenses because they focus on a key dimension of organizations that has been uncritically accepted by mainstream organization studies: that over the course of human history organizations have served as instruments of social domination and that they are shaped by “asymmetrical power relations that result in the majority working in the interests of the few” (Morgan, 1986: 275). From a critical theory perspective, the various functional organization theories that paired with positivist methodologies, constitute mainstream organization studies, have uncritically accepted and even obscured this fundamental divergence of interests that shapes organizations and that results from and reproduces the structure of contemporary capitalism; this uncritical acceptance of the status quo has resulted in mainstream theories’ failure to theorize and address fundamental social problems emanating from it (Adler, 2009; Adler and Jermier, 2005; Benson, 1977).

Critical approaches to organization studies, also referred to as radical organization theory or critical management studies, analyze organizational phenomena through the lenses of conflict, power, and domination in order to unveil how organizations are shaped by and intertwined with the structure of contemporary capitalism (Adler et al., 2007; Alvesson, 1985; Alvesson and Deetz, 2000; Burrell, 1979; Prasad, 2005). Thereby, they complement mainstream organization studies by challenging basic assumptions underlying organization theories as well as the ends served by theories and empirical research, and by offering alternative theories built on exposing and challenging asymmetries of power underlying the nature of organizational life through research that openly communicates its values and ideological commitments to further the interests of stakeholders other than the managerial and owner classes (Alvesson, 1985; Burrell, 1979; Mir and Mir, 2002; Smircich and Calás, 1995).

While some of the aims of critical research may be pursued either by qualitative or by quantitative approaches, the dominance of qualitative critical research stems from the possibilities of integrating assumptions and insights from critical theory into the research process and from the incompatibility of key assumptions of critical theory with assumptions of positivism infused into
quantitative research (Alvesson and Ashcraft, 2009). In this chapter, I outline how qualitative approaches to organization studies inspired by critical theory enrich our understanding of organizations. To do so, I begin by describing the defining characteristics of critical inquiry; I then illustrate the potential of critical approaches to provide vital alternative and complementary theoretical insights to mainstream theories in different subfields of organization studies, before highlighting a selection of valuable critical approaches for organization studies.

The Foundations of Critical Inquiry

Critical inquiry, one of the key paradigms currently operating in the social sciences (Guba and Lincoln, 1994; Lincoln and Guba, 2000), denotes a distinct way of analyzing social relations. In a narrow sense, the term critical theory is usually associated with the Frankfurt School of Social Theory, which in turn has been heavily influenced by the work of Karl Marx and has loosely been defined as a school of Western Marxism (Held, 1980; Therborn, 1970). More broadly, the term critical social theory refers to a diverse but interrelated range of traditions focused on cultural critique of contemporary capitalist societies that have mingled the seminal thought of the Frankfurt School with related authors and lines of thought, including poststructuralism (Agger, 1991, 1998).

The different strands of critical theory offer counterpoints to dominant functionalist positivist theories of social science generally and of organizations specifically. They share a commitment to critiquing and transforming dominant views of how organizations should be managed and studied as well as an overarching key set of tenets that informs these efforts to critique and transform (Agger, 1991, 1998; Alvesson, 1985; Burrell, 1979; Horkheimer, 1937; Jermier, 1998; Scherer, 2009). First, they start from the premise that capitalist societies are shaped by a concentration of power in the hands of relatively small elites and large corporations that benefit from a systematic exploitation of a disenfranchised majority of society as well as of the natural environment. Second, they assume that domination is structural and that people’s lives are continuously shaped by larger social institutions, hence social scientists must analyze any social phenomenon in a wider social context. Third, they hold that realities and structures of oppression and domination are socially constructed and that they become seemingly unchangeable by creating a false consciousness that obscures the socially constructed nature of reality through ideology, hegemony, and/or one-dimensional thinking. Fourth, they assert that mainstream positivist functionalist social science research contributes to developing and sustaining this false consciousness by accepting, portraying, and legitimizing the status quo as both inevitable and rational. Fifth, while mainstream theory and research is portrayed as value neutral and as oblivious to its own investment in the status quo, critical theory openly declares its ideological commitments to disrupt social reproduction and to elucidate societies’ systems of oppression, exploitation, and domination that are obscured by ideology. Sixth, the objective of critical inquiry is to change fundamental oppressive structures in society and to emancipate all people from oppression by producing knowledge that can provide the basis for political and social action aimed at transforming the social world in line with its ideological commitments; to accomplish this objective, researchers should not take any aspects of social and organizational realities for granted as neutral expressions of their proper functioning.

The pursuit of emancipatory knowledge of critical inquiry implies three fundamental and interrelated elements (Fournier and Grey, 2000): a focus on reflexivity and on the transparency of ideological commitments; a focus on disrupting false consciousness by denaturalizing aspects of social reality; and a focus on disrupting social reproduction through a stance of progressive performativity.
Reflexivity and Openly Ideological Science

Starting from the premise that any social theory or research is undergirded and shaped by political-ideological interests, from its very inception critical theory has emphasized the need for reflexivity as a foundational element (Horkheimer, 1937). Critical approaches assume that reflexivity is crucial because researchers’ subjectivity and interests are always imprinted on the knowledge they produce, independent of whether this was the researchers’ intention (Harding, 1987, 2004). Because of this imprinting, from the vantage point of critical theory research is a social practice that needs to be accountable (Steffy and Grimes, 1986) because all theories, systems of knowledge, and facts are embedded in and reflect particular and relativistic world-views. Reflexivity is needed to give account of and to understand how knowledge is influenced by researchers’ subjective experiences and their positions within particular socio-historical, economic, moral, and political systems. This includes reflexivity of individual and collective or even civilizational assumptions of how researchers think or what they consider to be “the world” or “reality” through established categories or concepts (Scheurich and Young, 1997). It further includes exploring how science and research agendas are controlled by disciplines and public institutions (Harding, 2004).

The seeming avoidance of values, which is a defining characteristic of traditional positivist theories, is considered problematic because it is “the strongest value commitment of all” (Agger, 1991: 111) and because claims of value neutrality impair critical examinations of the shaping influence of values and interests, thus making theories and frameworks susceptible to being shaped by and complicit with economic and political projects of dominant groups (Harding, 2004). For critical theory, then, knowledge that acknowledges its underlying value commitments and partiality is both less distorted and its distortions are more visible and thereby revisable compared to knowledge that discounts its partiality (Kincheloe and McLaren, 2000). Attuning researchers to the assumptions that underlie their empirical research through reflexivity is the foundation to challenge knowledge produced by traditional perspectives by exposing their exclusions and dominant assumptions and to pursue research with emancipatory objectives. It also is considered to be critical theory’s key methodological contribution to the social sciences (Agger, 1991) that in recent years has gained increasing attention also in organization studies (e.g., Alvesson et al., 2008; Johnson and Duberley, 2003).

Denaturalization and False Consciousness

The second foundational element of critical theory is rooted in the observation that different forms of oppression can be sustained when individuals develop a so-called false consciousness that leads them to accept socially constructed realities as seemingly “unchangeable,” “objective,” or “naturalized.” In order to reach its emancipatory interest to promote democratic transformation of social structures to the benefit of society broadly as opposed to the benefit of a small elite, critical theory emphasizes the importance of relieving individuals of this false consciousness by “denaturalizing” social reality (Agger, 1998; Alvesson, 1985; Jermier, 1985).

Denaturalization involves reverting processes of social construction also referred to as alienation and reification. Alienation is the “process by which man forgets that the world he lives in has been produced by himself” (Berger and Pullberg, 1965: 200). This in turn enables the reification or naturalization of key aspects of socially constructed realities, including prevalent forms and structures of social domination; this means they become apprehended “as if they were something else than human products – such as facts of nature, results of cosmic laws, or manifestations of divine will” (Berger and Luckmann, 1967: 89). To revert processes of alienation...
and reification, critical theory focuses on elucidating how characteristics of these realities become naturalized as fixed and external objects by concealing their systematic (i.e., ideological) distortions and the process of their construction (Deetz, 1992). Moreover, critical theory’s ideological critique recognizes that just as “objective social reality exists not by chance, but as the product of human action, so it is not transformed by chance” (Freire, 2000: 51). Accordingly, it aims to produce emancipatory knowledge to inform political and social action for human liberation and social justice (Alvesson, 1985; Freire, 2000; Held, 1980) through conscientization, i.e., a process that enables people to have a deeper awareness of the socio-cultural reality that shapes their lives as a precondition for developing the capacity to transform this reality (Freire, 1970).

**Subverting Social Reproduction through Progressive Performativity**

Critical theory’s third foundational element is its declared aim to subvert social reproduction (Horkheimer, 1937; Therborn, 1970). According to critical theory, this contrasts the non-critical traditional theoretical frameworks’ (and their positivist approaches’) “performativity intent,” i.e., that they have effectively become subservient to capitalist ideology and that therefore their purpose (even if inadvertently) is to serve the interests of dominant groups by subordinating knowledge and truth to efficiency (Agger, 1991; Alvesson, 1985; Alvesson and Deetz, 2000). For organization studies, this means that theory and research are unquestionably directed towards increasing organizational performance (Fournier and Grey, 2000).

Critical theory aims to break with this performative intent in order to disrupt the status quo and to facilitate emancipation from structures of oppression. As such, it is anti-performative in that it is interested in “performativity only in that it seeks to uncover what is being done in its name” (Fournier and Grey, 2000: 17). While critical theory from its very inception has emphasized critique for the purpose of change (Horkheimer, 1937), some later work in this tradition has been criticized for not moving beyond a stance of “anti-performativity,” which showcases the shortcomings of contemporary capitalism but otherwise does not work towards actively transforming it (Therborn, 1970). Noting that this is too limited in that it falls short of the emancipatory objective of critical approaches to affect social change, recent authors have emphasized the need to more fully harness the performative potential of critical theory and inquiry. The notion of critical performativity emphasizes the potential for research to engage with specific organization theories to open up new ways of understanding and engaging with organizational phenomena in ways that affect managerial discourse and practice through active and subversive interventions (Alvesson and Spicer, 2012; Spicer et al., 2009).

**Critical Inquiry as Counterpoint to Mainstream Organization Studies**

In this section, I draw on selected examples from the literature to demonstrate that and how qualitative critical inquiry can provide much needed alternatives and counterpoints to mainstream research on key themes in the different domains of organization studies. These examples do not constitute an extensive review of the literature but rather are intended to illustrate how qualitative inquiry, building on the key tenets of critical approaches discussed above (i.e., reflexivity, denaturalization, and progressive performativity), enables researchers to advance alternative insights on major topics of study in all areas of organization studies research. Collectively these examples also illustrate the rich diversity of critical inquiry approaches.

I begin with strategic management, which has come to take a central role in organization studies as well as in contemporary capitalism (Grandy and Mills, 2004; Greckhamer, 2010). In its mainstream, strategy research has largely revolved around explaining why some firms are...
more successful than others and how firms can attain competitive advantages underlying this success (Bowman et al., 2002). However, starting with Shrivastava’s (1986) seminal challenge of the ideological foundations of strategic management, a stream of critical approaches has pinpointed the void of reflexivity and critical self-appraisal of motivations and core assumptions that underlie the mainstream theories of strategic management (e.g., Levy et al., 2003; Whipp, 1999). In short, critical approaches aim to unmask power relations in the social realities produced and reproduced through strategic management, by converting “strategy” from a descriptive label connoting a domain of researchable objects such as strategies, markets, competencies, opportunities, top management teams, etc., to discourses that constitute the objects, social realities, and institutions that researchers are urged to study and managers are urged to act upon (Clegg et al., 2006; Ezzamel and Willmott, 2004, 2008).

A selection of diverse examples serves to illustrate that critical inquiry enables much needed alternative insights to what strategy is, how it shapes organizational realities, and what from a critical theory position it could and should be. For example, several studies by Vaara and colleagues show how critical discourse analysis enables alternative insights regarding core strategy topics such as mergers and acquisitions. Specifically, in one study these authors problematize how mergers and acquisitions are justified and legitimized through public media discourse (Vaara and Tienari, 2002), whereas in another study they explore how mergers and acquisitions are used to legitimize the global restructuring of industries (Vaara et al., 2006). In yet another critical discourse analysis study, Vaara and colleagues (Vaara et al., 2010) explore the power effects of strategic plans as a specific discursive genre.

Along similar lines, Greckhamer (2010) uses a critical discourse analysis approach to denaturalize the fundamentally ideological functions of strategic management theory by showing how Michael Porter’s work expanded strategic management discourse to envelop economic development, the discursive mechanisms by which this expansion was accomplished, and how these mechanisms were normalized. Ezzamel and Willmott (2008) focus on how discursive practices emerge and are promoted as well as justified, by studying how strategy activity is articulated, mobilized, and enacted; in doing so, their study provides a possible account of how the discursive practices they studied emerged and were promoted and justified. A different line of critical inquiry has explored issues related to strategy and actors’ identities. For example, building on the notion that discourse distributes power and privileges among actors by constructing subject positions (Hardy and Phillips, 2004), research has explored the dynamics of identity construction through strategy discourse and practice (Laine et al., 2016), as well as how strategy discourse impairs versus enables participation in strategy practice (Mantere and Vaara, 2008).

To give an example that showcases the political-ideological nature of data sources frequently used in mainstream strategy research, the critical hermeneutic study by Prasad and Mir (2002) explores the ideological content and character of CEOs’ letters to shareholders of U.S. oil companies in their respective historical context. Along different lines, Levy and Egan (2003) demonstrate the value of critical neo-Gramscian theory to analyze corporate political strategies and how a Gramscian approach can enrich theorizing about institutions by providing a theory for analyzing structure–agency relationships. To give a final example, the work by Jermier (1985) implies how critical approaches question ownership structures, which are a key taken-for-granted domain of mainstream strategy research.

The literature has also established the potential of critical inquiry to complement mainstream research on entrepreneurship. An influential mainstream definition has conceptualized “the field of entrepreneurship as the scholarly examination of how, by whom, and with what effects opportunities to create future goods and services are discovered, evaluated, and exploited”
(Shane and Venkataraman, 2000: 219). Critical scholars, on the other hand, note that the presence of entrepreneurship has come to be attributed to success whereas its absence has come to be attributed to failure (Armstrong, 2005). More generally, critical scholars conceptualize entrepreneurship, both as an academic field of study and an interrelated area of public policy, as a political-ideological project that aims to reproduce conservative social, political, and economic assumptions and behaviors as well as to shape public policy and public discourse (Armstrong, 2005; Tedmanson et al., 2012).

For example, Ogbor (2000) provides an ideological critique of key theoretical constructs associated with entrepreneurship and argues that they are inadequate tools for analyzing the diverse range of possibilities and constraints for new business creation because the very concept of entrepreneurship is discriminatory, infused with gender and racial biases, and ideologically controlled. Similarly, based on a critical feminist approach, Ahl and Marlow (2012) argue that entrepreneurship discourse is persistently marked by a hidden gender bias that is not consistent with the idea that entrepreneurial success is determined by personal effort, concluding that critical research is needed to shed light on who can be recognized as an entrepreneur and what it entails to be an entrepreneur. Likewise building on a critical feminist perspective, Calás et al. (2009) seek to reframe theory and research on entrepreneurship from an emphasis on positive economic activity to create wealth to entrepreneurship as activities for social change, which places emphasis on the interests served through entrepreneurship and thereby includes the possibility of a variety of outcomes.

Not unlike research on strategic management and entrepreneurship, research in organizational behavior remains strongly dominated by functionalist positivist theories (primarily from social and applied psychology) paired with an emphasis on a certain kind of rigor that aims to secure the objectivity of the conduct and outcome of research (Alvesson and Deetz, 2000). Jackson and Carter (2000) note that the primary implicit or explicit purpose of traditional organizational behavior theory and research is “providing techniques for manipulating organizational behavior” (p. 5) whereas “the purposes that organizations serve, and thus the purposes to be served by manipulation of organizational behavior, are treated as obvious, and beyond question” (p. 6). Here again, a few examples demonstrate how critical inquiry provides much needed alternative theoretical and empirical insights on main organizational behavior topics, including (but not limited to) leadership, teams, motivation, diversity, and identity.

To begin with, work by Adler (2007) showcases how a critical approach building on labor process theory can inform central research themes in organizational behavior such as teams and motivation. For example, it illustrates that theories and empirical research on motivation may need to be expanded towards collectivist sources of motivation in organizations that aim to increase the effectiveness of their labor process by redesigning jobs towards mobilizing and holding responsible collectives of workers. He also suggests that beyond studying the functionalist aspects of teams to improve organizational performance, research should study teams as tools of normative and coercive control as well as the various tensions resulting from this control. To give an example for the potential of critical approaches to leadership studies, Zoller and Fairhurst (2007) highlight how a critical approach to leadership can provide the basis for theorizing agency in organizations that has implications for our understanding of how organizational members may mobilize resistance against organizational policies, how they influence organizational change, and what attributions they hold of leadership. Alvesson and Spicer (2012) complement these insights on leadership by highlighting the need for critical studies that develop strong critiques of leadership ideology as a general source of domination while at the same time developing the potential for progressive performativity on leadership that appreciates potential situations in which leadership in local organizations may be needed.
Another example is a stream of critical research on organizational diversity that provides a much needed counterpoint to mainstream organizational behavior research on this topic by emphasizing three fundamental issues (Zanoni et al., 2010: 13–14): that identities are socially constructed and that critical inquiry is needed to denaturalize how processes of social identity construction in organizations are shaped by “the vantage point of a dominant identity of white, heterosexual, western, middle/upper class, abled men” (p. 13); the need to study how organizational and societal contexts shape identities and therefore the meaning of diversity; and the need to theorize that and how power relations result in de facto structurally unequal access to and distribution of resources between socio-demographic groups. In this line of research, Zanoni’s (2011) study of diversity in an automobile company illustrates that conceptualizing diversity as an intersection of sets of socio-demographic identities inscribed within class relations is a viable tool for understanding how inequality in contemporary organizations is produced and sustained by exploiting distinct socio-demographic identities in the organizations’ labor force that reflect unequal potential to produce economic value.

The domain of international organization studies, which broadly encompasses comparative and cross-cultural management, the national business systems approach, comparative institutionalist perspectives, and intersections of all of these with the broader literature on international business and this literature’s focus on multinational corporations, has been the most resistant to the evolution of a critical perspective (Jack et al., 2009: 871). Although functionalist positivist theories and empirical approaches dominate this domain, critical scholars have demonstrated the potential of critical inquiry also for this domain of organization studies.

To give a specific example, focusing on one of the core phenomena of international organization studies, i.e., multinational corporations (MNCs) and their operations, Levy (2008) shows the importance of critical analyses to understand how MNCs and their operations perpetuate social inequality and oppression in an international context through a combination of market and political power. In this vein, Hodge and Coronado’s (2006) critical discourse analysis illustrates the increasing influence of the ideologies and practices of MNCs on the agendas of national governments. To give another example, Greckhamer and Cilesiz (2012) illustrate the potential of critical approaches to provide alternative paths to study phenomena related to “emerging economies,” an important area of research at the nexus of international and strategic management research.

A vital strand of critical organization studies in the international domain builds on a postcolonial perspective, which emphasizes that international business research exhibits continuities with the colonial project (Jack and Westwood, 2006). Scholars following in this tradition point to the dearth of non-Western organizational knowledge, to misguided applications of Western theories and knowledge in non-Western study contexts, and to oversimplified representations of “the Other” in Western management discourses (Frenkel, 2008: 925). Özkazanç-Pan (2008) further highlights that a postcolonial perspective can provide analytic lenses that illuminate how mainstream international management “knowledge” materially impacts the non-West; she also proposes a research agenda that disrupts the hegemony of a Eurocentric epistemology that from a postcolonial perspective is even embedded in critical approaches.

**Critical Inquiry Approaches**

In the previous section I have illustrated that critical inquiry enables researchers to pursue much needed alternatives and counterpoints to the bulk of functionalist positivist approaches in organization studies. To realize this potential, organizational scholars can draw on a diverse range of established critical qualitative approaches. In this section, I briefly discuss a selection of
well-established critical approaches and for each of these approaches I refer to key literature to provide interested readers with entry points for further reading.

Overall, the different approaches to critical qualitative inquiry build on the central tenets of critical inquiry discussed above. Accordingly, they share the commitment to transformative research that exposes and critiques different forms of oppression, inequality, and discrimination in social life; connect meanings to broader socio-historical contexts and to structures of social power and control; aim for theory building that both respects as well as confronts and challenges taken-for-granted interpretations of individual’s daily lived experiences; and aim to speak with rather than to or for marginalized groups (Lather, 2003). Some of these approaches, including critical feminism and critical race theory that I discuss below, are dedicated specifically to shed light on and overcome the oppression and domination of particular groups of people.

**Critical Feminism**

Feminist theory and research overall “is old enough to have a history complete with its own set of labels” (Tong, 1998: 1) and as such is a contested field in its own right (St. Pierre, 2000). The range of feminist theories share the core claim that “women’s interests have been unjustly subordinated to those of men” (Martin, 1990). Accordingly, the different feminist approaches on a general level are all critical and political in that they critique the status quo of the social, economic, cultural, and institutional positions of women in society and their resulting experiences; however, the degree of critique and the nature of politics assumed and focused on vary across approaches (Calás and Smircich, 1996). Within the family of feminist approaches, critical feminism assumes that all knowledge, social institutions, and structures have a long history of being gendered and shaped by male dominance, resulting in women being historically disadvantaged; critical feminism’s key ideological commitment is to overcome this form of gender domination, which includes the aim to bring the feminist perspective to bear on broader social problems (Calás and Smircich, 1996, 2014).

More specifically, a critical feminist approach subsumes three central commitments aimed at reshaping the status quo of ideological and institutional structures. First, it makes gender and gender relations a key substantive focus of analysis; second, it explicitly embraces the political aim to promote equality between women and men; and third it aims to describe the world in correspondence with women’s experiences and to identify the fundamental social transformations of the status quo that are necessary for full gender equality (Rhode, 1989). Arguing that conventional epistemological positions are androcentric (male-dominated) and exclude researchers from gaining certain knowledge that corresponds with women’s experiences, critical feminist scholars emphasize the need for epistemological in addition to methodological considerations (Harding, 1987). Harding (2004) further notes that, from the point of view of critical feminism, women are only an example of a marginalized and/or oppressed group and therefore other oppressed groups could benefit from appropriating its epistemological and methodological positions.

**Critical Race Theory**

Another critical approach committed specifically to overcome the oppression and domination of a particular group of people is critical race theory; this critical interpretative framework is promising for organization studies because the field so far has largely neglected and marginalized race as an analytical category (Holvino, 2010; Nkomo, 1992). Acknowledging the importance
of class-based and gender-based theoretical approaches of critical and feminist research, critical race theory emphasizes that they are insufficient to explore issues of racial domination (Ladson-Billings and Tate, 1995). Critical race theory’s overarching objective is to transform ingrained relationships among race, racism, and power that position people of color as inferior (Delgado and Stefancic, 2001; Scheurich and Young, 1997; Tate, 1997). To do so and to enable analyses of racism as a system of oppression, it aims to shed light on the ways race and racism are deeply embedded within contemporary (U.S.) society (Parker and Lynn, 2002).

Critical race theory is built upon several key assumptions (Tate, 1997). First, it assumes that racism is deeply engrained in legal, cultural, and psychological aspects of U.S. society. Second, it notes that arguments such as neutrality, objectivity, color-blindness, and meritocracy are frequently used as camouflage for the self-interest of powerful entities of society. Third, it emphasizes the need to analyze how people are “raced,” i.e., how individuals’ experiences are shaped by the socially constructed realities of race and race relations. Fourth, it challenges ahistorical positions regarding race and race relations and embeds research on individuals’ experiences related to race in an examination of contextual and historical factors.

Furthermore, critical race theory aims to unpack different layers and kinds of racism. Specifically, Scheurich and Young (1997) argue that different forms of racism impact the epistemologies underlying our research. They also outline the different kinds of racism: overt and covert racism at the individual level that may bias individuals’ thinking but may be covered up with socially accepted reasons; institutional racism embedded in organizations’ standard operating procedures or in society at large (also referred to as societal racism), and civilizational racism that is engrained in broad civilizational assumptions that are vital to how a civilization’s members construct their world and their experience in it but that they are not typically conscious about.

Critical race theory also entails the notion of intersectionality first introduced by Crenshaw (1989). Arguing that race and gender are not mutually exclusive but rather interrelated categories of experience and analysis in that they represent interrelated systems of domination and oppression, Crenshaw (1989: 140) emphasizes that research should focus on these intersections because “the intersectional experience is greater than the sum of racism and sexism.” Intersectionality is vital for organization studies because the importance of intersections such as those among race, class, and gender, for organizational life have so far not been widely acknowledged in the field (Holvino, 2010; Nkomo, 1992). Concluding their review of feminist theories, Calás and Smircich (1996: 236) note the importance of the intersections among critical approaches by emphasizing that “it’s not only about ‘gender’ any more, as both women and men, from both First and Third Worlds, employed and unemployed, with and without families, struggle with inequality, injustice, inequity and intolerance.”

**Critical Discourse Analysis**

Critical discourse analysis is a vital critical inquiry approach that provides the theoretical and methodological tools to analyze the constitutive role of language in constructing social reality. In short, discourses can be defined as structured collections of meaningful texts that construct social reality (Burman and Parker, 1993; Phillips et al., 2004). Critical discourse analysis is the systematic study of the texts that constitute a discourse in order to understand its role in the construction of inequality, dominance, and oppression in social reality with the purpose of challenging and transforming social reality in these regards (Fairclough, 1993; Luke, 1996; Van Dijk, 1993). In doing so, it focuses on links between language and power and assumes that ideologies and power structures shape the representation of “knowledge” or “facts” about “reality” from the perspective of a particular interest (Fairclough, 1985; Luke, 1996).
Critical Approaches

Not all discourse analysis is critical, and critical discourse analysis differs from other forms of discourse analysis by embracing the basic tenets of critical theory and by taking an explicit socio-political stance that represents its principles, value commitments, and objectives (Van Dijk, 1993). From this openly ideological position, it aims to analyze the hidden ideologies and technologies of control concealed in a body of text that guide thought and action to the exclusion of other possibilities by defining particular meanings associated with sets of concepts, objects, and subject positions, thereby shaping power relations that characterize social settings and influencing what can be said and by whom (Hardy and Phillips, 2004). Discourse analyses of this kind provide “the means to highlight the possibility that things could be or could have been different” (Iedema, 2011: 1172) and thereby facilitate the exploration of a range of key themes of critical research (Fairclough, 1985, 1993; Iedema and Wodak, 1999). For example, they enable the investigation of systematic relationships between discourses and wider social and cultural structures and processes, particularly how discourses construct and reproduce power relations; how discourses construct the rationalities or logics underlying organizations and institutions, as well as how these logics, and the organizations and institutions they support, become taken-for-granted; and how understanding gained through discourse analysis can serve as a resource to challenge and disrupt structures of power, dominant ideological positions, and the social relations and organizational practices that constitute organizations.

Critical Ethnography

Another vital critical qualitative approach to study organizational realities is critical ethnography. Overall, critical ethnography is “conventional ethnography with a political purpose” (Thomas, 1993: 4) that “begins with an ethical responsibility to address processes of unfairness or injustice within a particular lived domain” (Madison, 2005: 5). Put differently, critical ethnography draws on conventional ethnographic data collection methods for the empirical investigation of everyday cultural experiences using participant observation; however, it is concerned with asking fundamentally different questions and pursuing fundamentally different objectives than classical ethnography. Specifically, whereas ethnography in an interpretivist tradition considers cultural contexts and lifeworlds as descriptive objects and aims to provide an interpretative description of them, critical ethnographers conceptualize these cultures and lifeworlds as ideological productions and reproductions that they aim to disrupt through openly ideological alternative accounts (Koro-Ljungberg and Greckhamer, 2005).

The overarching purpose of critical ethnography is to account for the dialectical relationship between social structural constraints of human agency and its relative autonomy with the emancipatory objective of freeing individuals from sources of domination and oppression (Anderson, 1989). While interpretivist ethnography readily concedes that ordinary action observed in a social situation must be understood in its social context, Forester (1992) notes that critical ethnography starts from the premise that “the very context itself is not given but made, inherited and appropriated in subtle political ways” (p. 47) and that it “aims to explore the continuing performance and practical accomplishment of relations of power” (p. 62). Thereby, critical ethnography enables researchers to emphasize different concerns related to various disenfranchised groups as well as to focus on intersectionality, i.e., on how current social relations are (re)produced by intersections of social dimensions including class, gender, and race (Anderson, 1989; Foley, 2002).
Critical Action Research

Action research is an approach that represents a confluence of research, consulting, social action, and reflection (Wolfram Cox, 2012), and it has long been recognized that this approach has potential for critical inquiry (Johansson and Lindhult, 2008). From its very origins, action research was conceptualized as an approach towards social research that tackles the challenge of combining the two emphases of generating theory and of changing a social system through researchers’ actions on or in this system (Lewin, 1946; Rapoport, 1970; Susman and Evered, 1978). Its advocates maintain that it has unique and desirable characteristics, both as a research method and as a social intervention technique, and some authors use the term participatory action research to signify research in which researchers become full collaborators with members of organizations to study and transform those organizations (Greenwood et al., 1993). However, pure consulting and/or advocacy projects and projects that do not make theoretical and/or empirical contributions to the social sciences by definition are not action research (Bradbury Huang, 2010).

Critical action research projects aim at the emancipation of underprivileged groups by helping members of these groups to develop a critical and reflective understanding of dominant ideologies and coercive structures that shape their lifeworlds (Johansson and Lindhult, 2008; Kemmis, 2001). A key influence in this regard has been the seminal work of Paulo Freire (1970, 2000), which does not consider critical scholars’ responsibility to transform the social settings they study; it rather emphasizes the importance of denaturalizing taken-for-granted assumptions through conscientization of individuals in the respective setting so that these individuals are empowered to transform the setting on their own accord.

Conclusion

As noted in the introduction, over the course of human history organizations have served as instruments of social domination and they have been marked by asymmetrical power relations (Morgan, 1986). Critical qualitative inquiry holds great potential and promise for organization studies because it offers the constructive potential to contribute to developing the lines of thought that are needed to identify and overcome oppressive organizational structures (Alvesson, 1985). Indeed, critical scholars have argued that the grave and sustained man-made (and therefore unnecessary) suffering in our contemporary world makes it an ethical responsibility for organizational scholars to contribute to a critical organization science that illuminates organizational and institutional structures of exploitation and oppression and that combines theory with revolutionary action to contribute towards the emancipation of those suffering from these structures (Adler and Jermier, 2005; Frost, 1980).

Theory and research informed by critical inquiry’s openly political and ideological approaches are shaped by a strong normative component not only to study how social realities are but also to theorize and research how from their standpoint they ideally could and should be, as well as how they could be transformed towards this ideal (Jermier, 1998). Like any theoretical approach to organizations, critical inquiry is guided by particular assumptions and as such only enables a partial understanding of organizational phenomena. However, by taking into account the political and ideological aspects of organizations neglected by positivist and functionalist organization studies (Alvesson, 1985; Benson, 1977; Frost, 1980; Jermier, 1985), it allows researchers to connect socio-historic context, structure, and individual lived experiences in ways that can inform intellectual and political transformations of how we study and understand organizational phenomena (Mir and Mir, 2002).
Notes

1 This school took its name from the Institut für Sozialforschung (Institute for Social Research) that was set up in Frankfurt am Main in 1923 and includes the work of a group of scholars who were associated with it before they had to leave Germany due to the Nazi Regime’s rise to power.

2 Poststructuralism encompasses the work of a diverse group of (French) theorists, whose work collectively represents a movement of thought embodying different forms of critical practice (Agger, 1991; Poster, 1989). Both critical inquiry and poststructuralism are effectively critiques of dominant (positivist) approaches to “scientific” knowledge production and they are “both alike and different” (Alvesson and Deetz, 2006: 272), with each in its own way “interrogating taken-for-granted assumptions about the ways in which people write and read science” (Agger, 1991: 106). In this chapter I use the terms critical theory and critical inquiry as heavily influenced by but not strictly limited to the denotation of the Frankfurt School of Critical Theory.

3 Naturalization refers to reification that mystifies social reality as a given or “natural” condition (Shrivastava, 1986; Fournier and Grey, 2000).

4 While not providing any examples below, I note that mainstream human resource management suffers from similar theoretical and practical limitations in that it takes for granted the basic economic and political structures of contemporary organizations and omits a concern for how political-economic structures impact organizations and individuals’ work places in them (Nord, 1974).

5 The basic stance of action research that the raison d’être of social sciences is to contribute to the solution of social problems is reflected in Kurt Lewin’s remark that “research that produces nothing but books will not suffice” (1946: 35); this stance makes action research an apparent fit for critical inquiry. However, action research is not necessarily critical but rather may also be positivist or interpretivist (Johansson and Lindhult, 2008; Kemmis, 2001).

References


Critical Approaches


