Guest editorial

Editorial: special issue on action research and its variants in project studies and project management

We demonstrate the importance of action research and its variants in project studies and project management through 10 papers selected for this special issue. The response to the call for papers was overwhelming and we thank all the researchers who worked for this special issue.

Action research aims to solve practical problems while expanding scientific knowledge. The action researcher works collaboratively with practitioners to bring about change. Thus, informants in traditional research become co-researchers in action research. The action research process can be conceptualized as a number of learning cycles (Van Der Hoorn, 2016) consisting of predefined stages, each starting with a diagnosis, which involves the joint (practitioner and researcher) identification of problems and their possible underlying causes. Action planning specifies the anticipated actions that may improve or solve the problems identified, and action taking refers to the implementation of those specified actions. Evaluation is the assessment of the intervention, and learning is the reflection on activities and outcomes (Myers, 2009; Susman and Evered, 1978; Coghlan and Shani, 2018). Action research is also an umbrella term for a number of diverse research methods, and there are many variants (Eikeland, 2012) as evident from this special issue.

The origin of this special issue can be traced back to 2017, when the editors proposed organizing a special track titled: *Making a Difference: Action Research and Engaged Scholarship in Projects and Innovations* to the Board of Project Organizing Strategic Interest Group of the European Academy of Management (EURAM) Conference. The proposal was accepted and the special track was part of the EURAM 2018 conference in Reykjavík, Iceland, 20–23 June. We repeated the track at EURAM 2019 in Lisbon, Portugal, 26–28 June. The popularity of the track at the two EURAM conferences highlighted the need for a forum to discuss action research and its many variants to enhance project management research.

Action research and its variants have not been in the mainstream within the project research community. Therefore, we have tried to bring action research to the fore through the special tracks at EURAM 2018 and 2019 as well as through this special issue over the past four years. It is surprising that a discipline such as project management has not naturally embraced action research despite its strong relevance for solving complex organizational problems (Avison *et al.*, 2018), ability to reconcile theoretical development and engagement with practice (Geraldi and Söderlund, 2018) and researching the actuality of practice (Cicmil *et al.*, 2006).

Special issue focus

This special issue focusses on action research, collaborative and participatory research, engaged scholarship in projects and innovations, to contribute to the future of management research, in particular project management, to find ways to make academic research more relevant to practice.

Engaged scholarship has a broader perspective as a participative form of research for obtaining the different perspectives of key stakeholders (researchers, users, clients, sponsors and practitioners) in studying complex problems (Van de Ven, 2007; Geraldi and Söderlund, 2016). Action research and engaged scholarship offer a great opportunity to address key

International Journal of Managing Projects in Business
Vol. 14 No. 1, 2021
pp. 1-12
© Emerald Publishing Limited
1753-8378
DOI 10.1108/IJMPB-02-2021-313

challenges in innovation and project studies in a novel and constructive way. Action research could become more relevant to professionals by enriching the rigour with which we conduct and publish research. According to Gustavsen (2005), action research has a role in promoting innovation through collaborative inquiry and action. It has the potential for enhancing practical and academic value not only through innovating products and services but also in complex organizational, systemic and ecosystem innovation projects. The advantages of using engaged scholarship and action research include improved stakeholder involvement; co-creation of knowledge; evaluating and guiding professional practice; supporting change and intervention; and designing, building and evaluating artefacts.

The purpose of this special issue is to publish work that will significantly enhance our theoretical and empirical understanding of action research related to projects and innovations. In selecting the papers, we have accepted all modalities in action research (Coghlan and Shani, 2018) such as action learning (Revans, 2017), action science (Argyris, 1995), appreciative inquiry (Whitney and Cooperrider, 2005), action design research (Sein *et al.*, 2011), clinical inquiry/research (Schein, 2007), collaborative management research (Shani *et al.*, 2007), design research (Hevner and Chatterjee, 2010; Van Aken, 2004), learning history (Bradbury and Mainemelis, 2001) and participatory action research (Kemmis and McTaggart, 2005).

Action research in project management journals

A review of papers published in prominent project management journals over the past two decades shows an increase in the number of publications using variants of action research.

Table A1 shows a list of papers using action research or its variants from a search using "action research" as a keyword.

Amongst the journals the *International Journal of Managing Projects in Business* (*IJMPB*) published the largest number of papers that reported using action research between 2007 and 2018, with 17 papers. This was followed by the *International Journal of Project Management* (*IJPM*), which published nine papers between 2007 and 2019, and the *Project Management Journal* (*PMJ*), which published four papers between 2015 and 2017. Seven of the papers in *IJMPB* that reported using action research were thesis reports or practice papers that were promoted by its editor Derek Walker, who encouraged PhD candidates and their supervisors to publish about their doctoral research in *IJMPB*. Some of the other papers published in *IJMPB* are also based on doctoral research.

A review of the earlier papers that used action research shows that some of these used traditional cyclical action research approaches while others combined action research with other methods or where action research was embedded in other methods such as case studies, mixed-methods and grounded theory. The strong relationship between systems thinking and action research resulted in papers that combined systems approaches such as soft systems methodology and system dynamics with action research and action learning.

Some creative applications of action research were also evident where action research was combined with storytelling or dialogue or scenario development. One of the papers also used action research to study innovations in megaprojects while another demonstrated the use of action research in co-value creation.

Some specific models of action research that were used in the papers are dual cycle action research (McKay and Marshall, 2001), Problem-Resolving Action Research Mode (Cardno and Piggot-Irvine, 1996) and Plan–Act–Observe–Reflect Cycle (Kemmis *et al.*, 2014). We found one conceptual paper that combined action research with critical realism (Fox and Duo, 2013) and one that used mainly action learning (Bourne, 2008).

Overall, the papers reporting using action research were project management related with only one paper reporting action research from outside the field.

Papers published in this special issue

The 10 papers selected for this special issue demonstrate the richness of action research-oriented approaches and their potential for unique contributions to project studies and project management, contributions that are not easily achieved using alternative approaches.

The papers show the many modalities within action research. There is a family of research approaches with various names and shades enriching the potential for practice-relevant research, and scientifically valuable practice, collaboration and improvement.

The papers advance project management research with some new variants in applying action research and other collaborative research approaches. Variants in action research include insider action research; participatory action design; interactive clinical action research and action design approach using autoethnography. In addition, the papers include research using engaged scholarship, which is also gaining prominence in project management research. A conceptual paper on co-productive research is included that could help design research to link theory and practice.

It is a somewhat confusing spectrum of overlapping names and we can wonder whether "action research" can cover them all. At the same time, we find many names for those we love; a dear child has many names.

We now summarize the 10 papers selected for this issue into four categories and present them in the following tables.

Table 1 shows the paper by Lindhult and Axelsson that helps to understand knowledge co-production thus providing a broad coverage of approaches that could encompass the other nine papers included in the special issue:

Table 2 covers two papers that have used engaged scholarship as their research approach. Both papers are based on research carried out in the infrastructure sector. While the paper by Caron, Rayd and Drouin is a conceptual paper using a systematic literature review, the paper by Brunet, Baba, Primeau and Dollar uses storytelling and vignettes capturing learning moments.

Table 3 covers papers that use co-design approaches showing the recent interest in design thinking amongst project management researchers. The paper by de Jong uses participatory action design (PAD) and shows how co-design with stakeholders can assist in determining measures for innovation whereas the paper by Mikkelsen, Venable and Aaltonen uses an action design approach to navigate project complexity to help with decision-making processes.

Table 4 includes five papers using a variety of action research approaches. All five demonstrate the variance in action research approaches. The article by Svejvig and Schlichter uses a conventional action research approach to create public value in the construction of a healthcare IT system. It is an example of a second-person action research process. The article by Brones, Zancul and Carvalho demonstrates the use of insider action research where change is pursued by an action researcher working in an organization in a product innovation application in the cosmetics industry. The article by Christiansen and Mouritsen demonstrates the application of clinical action research (Schein, 2007) on how to improve project evaluations using a sample of past projects to develop a framework for future project evaluations The article by Sankaran, Müller and Drouin uses action research reflectively as a meta-methodology or an umbrella process to evaluate how collaboration occurred in a funded research project, providing some useful strategies to project management researchers on how to collaborate effectively. The final article by Smith is an autoethnographic account of struggles encountered by a doctoral researcher coping with legitimacy issues for action research in project management research. This article also demonstrates the use of first-person action research.

Table 4 points to methodological potential and developments in conducting action research type of studies, e.g. AR as meta-methodology, insider action research,

Table 1.
Co-productive research approaches

Authors	Title	Category	Type	Sector	Theory	Design	Findings	Originality
Erik Lindhult and Karin Axelsson	The logic and integration of co-productive research approaches	Co-production	Conceptual	General	Knowledge production	Clarifies the character of co-production as research methodology concept; the logic of co-productive research approaches; and its characteristics compared with quantitative and qualitative methodology	Develops research methodology models for co-productive logic and approaches to research, and the integration of this type of approaches in mainstream research methodology	Develops a new research methodology understanding and models of co-productive research logic and approaches to guide researchers in designing co-productive research projects

Author	Title	Category	Type	Sector	Theory	Design	Findings	Originality
Marie-Andree *et al.*	Integration of non-financial benefits: a systematic review for engaged scholars	Engaged scholarship	Systematic literature review	Infrastructure projects	None	Reviews the literature on the integration of non-financial benefits (NFB) major infrastructure projects (MIP). The culture of collaboration and the notion of boundary objects are main aspects of the categorization arrived at	Research on the integration of NFB into MIP is largely society oriented rather than project oriented	Identified four clusters from their level of compatibility with engaged scholarship of integration of NFB into MIP
Maude Brunet *et al.*	Revealing the hidden facets of normative assessments: improving the management of major infrastructure projects	Engaged scholarship	Storytelling	Infrastructure	Multiple	Using a storytelling approach and vignettes to explore four situated learning moments. To explain a normative assessment process	Offers a deeper understanding of how normative assessment is conducted, and how situated and collective learning occur when both organizational actors and researchers learn through this process and synchronize their mutual learning	Highlights the relevance of engaged scholarship and supports normative assessment as a social process to generate mutual learning

Table 2.
Engaged scholarship

Table 3.
Co-design approaches

Author	Title	Category	Type	Sector	Theory	Design	Findings	Originality
Ilse Svensson de Jong	Under construction: action research in innovation measurement	Participatory action design (PAD)	Co-design	Innovation		Series of workshops using PAD developed with stakeholders at an innovation department. PAD facilitated interaction between the researcher, stakeholders and key performance indicators (KPIs) under construction	PAD workshops created interlevel collaboration and group dynamics in constructing the KPIs. The workshops enabled an understanding of the process of constructing a KPI in innovation, where stakeholders design and implement simultaneously	Demonstrates using PAD methodology for the construction of KPIs in innovation
Mogens *et al.*	Researching navigation of project complexity using action design research	Action design approach	Co-design	Project management community	Complexity	Designed and evaluated the Complexity Navigation Window to represent project complexity as a key component of the user interface for a Decision Support System (DSS)	The artefact used was relevant, comprehensible and showed promise to guide decision-making in the context	Provides improved understanding of practitioners' perceptions of project complexity and ability to assess it for a given project

Table 4. Variety of action research approaches

Author	Title	Category	Type	Sector	Theory	Design	Findings	Originality
Per Svejvig *et al.*	Resources, capabilities and public value creation in a healthcare IT project: an action research study	AR – 2nd person	Empirical	Healthcare IT	Resource-based view (RBV)	Applies RBV to findings from an action research study of an optimization project of an integrated health information system to create value	Framework explaining how BM practices and, hence, value can be interrelated in a public healthcare IT system	Studies a real problem in a real setting to improve public value creation by direct engagement with researchers
Fabien *et al.*	Insider action research towards companywide sustainable product innovation: ecodesign transition framework	Insider action research	Longitudinal	Cosmetics industry	Ecodesign	Capture the change and transition aspects in a five-year study carried out within a Brazilian cosmetics company, using two AR cycles	Proposes an ecodesign transition framework using technical and soft aspects structured at strategic, tactical and organizational levels	The resulting framework is a novel perspective for integrating environmental considerations in the product innovation process of a company
John *et al.*	Learning from the ambiguous past with project reviews	Action research – Interactive clinical	Co-learning	Consumer electronics	Evaluation	Used several rounds of interaction over 11 months to improve project evaluations and learn from three past projects to improve future ones	Despite a benevolent organizational climate, the development process encountered problems, confusion and disagreement	Addresses the critical role of ambiguity when learning from history through project reviews and evaluation processes

(*continued*)

Table 4.

Author	Title	Category	Type	Sector	Theory	Design	Findings	Originality
Shankar *et al.*	Investigating collaboration in project management research: using action research as a meta-methodology	AR as meta-methodology	Empirical	Project management research	Collaboration	Multimethod approach (using AR as a meta-methodology and surveys) to investigate how collaboration occurred in a sponsored research project	This paper explains how and why collaboration takes place in project management research. It also reports on barriers and enablers to collaboration in research	A study of collaborative research in project management across the life cycle. Demonstrates using retrospective reflection on a research project using AR as a meta-methodology
Natalie Smith	Emerging from the swamp: an autoethnography on the legitimacy of action research	Autoethnograhy – First-person AR	Autoethnography	Project management	Legitimacy	An analytic autoethnography of a PhD candidature, utilising legitimacy theory	A self-perpetuating cycle is hampering the quality of action research. Lists of impediments to action research legitimacy. It predicts that legitimacy can be improved through differentiating and improving guidance to theoretical contribution and considering a broader range of stakeholders for research funding and execution	A more comprehensive and nuanced understanding of the assumptions and impediments to action research legitimacy. Perspective of a directly involved stakeholder to inform legitimacy theory variants

autoethnography, etc. The papers also cover a wide variety of uses of action research-oriented approaches to make both practical and scientific advances as demonstrated by the article by Svejvig and Schlichter.

The 10 papers show the way project studies and the project management field can advance practice and theory in integration through expanded use of participatory approaches. This special issue showcases a collection of 10 different ways of doing action research, and thus provides a single reference to project management researchers to appreciate the richness of action research. The papers also extend the range of action research to other forms of collaborative research that bear similarities to action research, such as engaged scholarship, design science and co-productive research. The papers also inform how projects can act as sources of innovation as some of the papers have been written by researchers from outside the project management field thus widening the scope of project management to new types of projects.

A few more papers on action research are under review and will be included in a subsequent issue of the journal.

The guest editors hope that after reading the papers in this issue more project management researchers will be motivated to use action research, engaged scholarship and other participatory approaches to link theory and practice in project management.

Per Svejvig
Department of Management, Aarhus University, Aarhus, Denmark

Shankar Sankaran
School of the Built Environment, University of Technology Sydney, Sydney, Australia, and

Erik Lindhult
Innovation Management, Academy of Innovation, Design and Engineering, Eskilstuna, Sweden

References

Argyris, C. (1995), "Action science and organizational learning", *Journal of Managerial Psychology*, Vol. 10 No. 6, pp. 20-26.

Avison, D.E., Davison, R.M. and Malarauent, J. (2018), "Information systems action research: debunking myths and overcoming barriers", *Information and Management*, Vol. 55 No. 2, pp. 177-187.

Bourne, L. (2008), "Advancing theory and practice for successful implementation of stakeholder management in organisations", *International Journal of Managing Projects in Business*, Vol. 1 No. 4, pp. 587-601.

Bradbury, H. and Maineemelis, C. (2001), "Learning history and organizational praxis", *Journal of Management Inquiry*, Vol. 10 No. 4, pp. 340-357.

Cardno, C. and Piggot-Irvine, E. (1996), "Incorporating action research in school senior management training", *International Journal of Educational Management*, Vol. 10 No. 5, pp. 19-24.

Cicmil, S., Williams, T., Thomas, J. and Hodgson, D.E. (2006), "Rethinking project management: researching the actuality of projects", *Interntioanl Journal of Project Management*, Vol. 24 No. 8, pp. 675-686.

Coghlan, D. and Shani, A.B.R. (2018), *Conducting Action Research for Business and Management Students*, SAGE Publications, London.

Eikeland, O. (2012), "Action research - applied research, intervention research, collaborative research, practitioner research, or praxis research?", *International Journal of Action Research*, Vol. 8 No. 1, pp. 9-44.

Fox, S. and Do, T. (2013), "Getting real about big data: applying critical realism to analyse big data hype", *International Journl of Managing Projects in Business*, Vol. 6 No. 4, pp. 739-760.

Geraldi, J. and Söderlund, J. (2016), "Project studies and engaged scholarship: directions towards contextualized and reflexive research on projects", *International Journal of Managing Projects in Business*, Vol. 9 No. 4, pp. 767-797.

Geraldi, J. and Söderlund, J. (2018), "Project studies: what it is, where it is going", *International Journal of Project Management*, Vol. 36 No. 1, pp. 55-70.

Gustavsen, B. (2005), "Innovation and action research", *International Journal of Action Research*, Vol. 1 No. No. 3, pp. 267-289.

Hevner, A. and Chatterjee, S. (2010), *Design Research in Information Systems: Theory and Practice*, Springer.

Kemmis, S. and McTaggart, R. (2005), "Participatory action research: communicative action and the public sphere", in Denzin, N.K. and Lincoln, Y.S. (Eds), *The Sage Handbook of Qualitative Research*, SAGE Publication, Thousand Oaks.

Kemmis, S., McTaggart, R. and Nixon, R. (2014), *The Action Research Planner: Doing Critical Participatory Action Research*, Springer, Singapore.

McKay, J. and Marshall, P. (2001), "The dual imperatives of action research", *Information Technology and People*, Vol. 14, No. 1, pp. 46-59.

Myers, M.D. (2009), *Qualitative Research in Business and Management*, Sage Publications, London.

Revans, R. (2017), *ABC of Action Learning*, Routledge.

Schein, E.H. (2007), "Clinical inquiry/research", in Reason, P. and Bradbury, H. (Eds), *The SAGE Handbook of Action Research: Participative Inquiry and Practice*, SAGE Publications, London.

Sein, M.K., Henfriddson, O., Purao, S., Rossi, M. and Lindgren, R. (2011), "Action design research", *MIS Quarterly*, Vol. 35 No. 1, pp. 37-56.

Shani, A.B., Mohrman, S.A., Pasmore, W.A., Stymne, B. and Adler, N. (2007), *Handbook of Collaborative Management Research*, Sage Publications.

Susman, G.I. and Evered, R.D. (1978), "An assessment of the scientific merits of action research", *Administrative Science Quarterly*, Vol. 23 No. 4, pp. 582-603.

Van Aken, J. (2004), "Management research based on the paradigm of the design sciences: the quest for field-tested and grounded technological rules", *Journal of Management Studies*, Vol. 41 No. 2, pp. 219-246.

Van de Ven, A. (2007), *Engaged Scholarship: A Guide for Organizational and Social Research*, Oxford University Press, Oxford.

Van Der Hoorn, B. (2016), "Discussing project status with the project-space model: an action research study", *International Journal of Project Management*, Vol. 34 No. 8, pp. 1638-1657.

Whitney, D. and Cooperrider, D. (2005), *Appreciative Inquiry: A Positive Revolution in Change*, Berrett-Koehler Publishers, San Francisco, California, CA.

Appendix

Year	Journal	Authors	Title	AR type
2007	*IJPM*	Sense	Structuring the project environment for learning	AR case study
2014	*IJPM*	Abrantes and Figueiredo	Feature-based process framework to manage scope in dynamic NPD portfolios	AR in a case study
2015	*IJPM*	Takey and de Carvalho	Competency mapping in project management: An action research study in an engineering company	AR using MM
2015	*IJPM*	Abrantes and Figuiredo	Resource management process framework for dynamic NPD portfolios	AR in a case study
2016	*IJPM*	van de Hoorn	Discussing project status with the project-space model: An action research study	Testing model using case study
2016	*IJPM*	Duffield and Whitty	How to apply the Systemic Lessons Learned Knowledge model to wire an organisation for the capability of storytelling	Traditional AR
2016	*IJPM*	Duffield and Whitty	Application of the Systemic Lessons Learned Knowledge model for organisational learning through projects	Traditional AR
2017	*IJPM*	Wu *et al.*	Leadership improvement and its impact on workplace safety in construction projects: A conceptual model and action research	Validating model
2019	*IJPM*	Liu *et al.*	The co-creation of values-in-use at the front end of infrastructure development programs	AR using mixed methods
2012	*PMJ*	Shelley	Metaphor interactions to develop team relationships and robustness enhance project outcomes	AR cycles
2014	*PMJ*	Algeo	Exploring project knowledge acquisition and exchange trough action research	PRAR model
2014	*PMJ*	Davies *et al.*	Making innovation happen in a megaproject: London's crossrail suburban system	AR in a case study
2015	*PMJ*	Dick *et al.*	Using action research as a meta-methodology in a funded research project	AR as meta-methodology
2007	*IJMPB*	Cavaleri and Reed	Leading dynamically complex projects	AR and case study
2008	*IJMPB*	Nogeste	Dual cycle action research: A professional doctorate case study	Dual cycle AR
2008	*IJMPB*	Sankaran *et al.*	Managing organizational change by using soft systems thinking in action research projects	SSM and AR
2008	*IJMPB*	Fox *et al.*	Formulation of robust strategies for project manufacturing business	AR field study
2009	*IJMPB*	Fox	Information and communication design for multi-disciplinary multinational projects	AR as field study plus survey
2012	*IJMPB*	Staadt	Redesigning a project-oriented organization in a complex system; A soft system methodology approach	SSM lead with case study and AR
2013	*IJMPB*	Fox and Duo	Getting real about big data: Applying critical realism to analyse big data hype	Combines Critical Realism and AR
2014	*IJMPB*	Walker *et al.*	Stakeholder voices through rich pictures	SSM and Action Learning
2016	*IJMPB*	van der Hoorn and Whitty	The project-space model: Enhancing sensemaking	Analysing completed AR study

(*continued*)

Table A1. Publications reporting us of action research in project management journals since 2000

Year	Journal	Authors	Title	AR type
2018	*IJMPB*	Duryan and Smyth	Cultivating sustainable communities of practice within hierarchical bureaucracies: The crucial role of executive sponsorship	AR and longitudinal a case study
2018	*IJMPB*	Fossum *et al.*	Exploring scenario development: A case study of two collaborative research projects	PAR in case studies
Practice studies and thesis notes				
2008	*IJMPB*	Nogeste and Walker	Development of a method to improve the definition and alignment of intangible project outcomes and tangible project outputs	Dual cycle AR
2008	*IJMPB*	Sense and Badham	Cultivating situated learning within project management practice: A case study exploration of the dynamics of project-based learning	PAR with a project team
2008	*IJMPB*	Bourne	Advancing theory and practice for successful implementation of stakeholder management in organizations	Action Learning and Community of Inquiry
2009	*IJMPB*	Niebecker *et al.*	Collaborative and cross-company project management within the automotive industry using the balanced score card	AR – mixed methods
2013	*IJMPB*	Stephens	Principled success: Eco-feminism and systems thinking come together for better project outcomes	AR + CGT: critical systems thinking
2014	*IJMPB*	Shelley and Maqsood	Metaphor as a means to constructively influence behavioural interactions in project teams	AR cycles
2015	*IJMPB*	Fox and Grosser	Economical information and communication design for multi-national projects	AR

Table A1.