Guest editorial: Second special issue on action research and variants in project studies and project management

Introduction

With this second special issue containing eight articles, we show the increasing importance of action research and its variants in project studies and project management. The response to the two calls for papers has been overwhelming and we thank all the researchers who sent papers to be included and the reviewers who helped review them. The decision to publish two special issues was taken as a result of the excellent response. Including the first special issue (Svejvig *et al.*, 2021), 18 articles on action research have been published across the two special issues we have guest-edited.

Action research involves close cooperation between practitioners and researchers to bring about change. It essentially consists of the analysis of a social situation followed by the introduction of changes and evaluation of the effects (Baskerville and Myers, 2004). The action research process can be conceptualized as several learning cycles (van der Hoorn, 2016) consisting of predefined stages, each starting with a diagnosis that involves the joint identification (by practitioner and researcher) 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 (Susman and Evered, 1978; Myers, 2009; Coghlan and Shani, 2018). Action research is an umbrella term for many diverse research methods, and there are many variants (Eikeland, 2012) as evident from the two special issues.

The origin of the special issues can be traced back to 2017, when the special issue editors proposed 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 (PO SIG) of the European Academy of Management (EURAM) Conference. The proposal was accepted for the EURAM 2018 conference in Reykjavik, Iceland, on 20–23 June. We repeated the track the following year for EURAM 2019 in Lisbon, Portugal, 26–28 June. The popularity of the track at the two conferences showed the need for a forum to discuss action research and its many variants to enhance project management research.

Surprisingly, a discipline such as project management has not embraced action research (cf. Svejvig *et al.*, 2021) 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 research the actuality of practice (Cicmil *et al.* 2006). We have tried to bring action research to the fore through the special tracks at EURAM 2018 and 2019 as well as through the two special issues.

Papers published in this special issue

The eight articles selected for this second special issue exhibit 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 articles 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. These articles advance project management research with some new variants in applying action research and other research approaches. Variants in action research include action research; participatory action design; practice-based research, collaborative research, design science research, action design research and ethnographic action research. It is a somewhat confusing spectrum of overlapping names and we may well wonder whether the term "action research" can cover them all. However, we find many names for those we love; a dear child has many names.

We now summarize the eight articles selected for this second special issue in the following Table 1.

The first article in the special issue, by David Coghlan, Abraham B. (Rami) Shani and Paul Coughlan, describes how quality in project management could be informed and enhanced by action research. Coghlan and colleagues are seminal authors in the field of action research (Coghlan and Shani, 2018; Coghlan, 2019), and have now entered the discipline of project management and show how the integration of the two fields can be made.

The next article by Annika Engstrøm, Anette Johansson, Nina Edh Mirzaei and Daved Barry discusses knowledge creation in projects and shows how an interactive research approach can be used to strengthen innovation capabilities in small and medium-sized enterprises.

The third article by Beata Jałocha, Ewa Bogacz-Wojtanowska, Anna Góral, Piotr Jedynak and Grazyna Prawelska-Skrzypek is based on institutional logics (Thornton *et al.*, 2012), which is used to analyze an action research study in a university context showing conflicting and sometimes co-existing logics.

This is followed by the article by Cláudia Sousa Silva, Cláudia Pereira and José Magano, describing the value of project management related to the organization's competitiveness. It proposes a holistic conceptual model to understand how project management brings value to the organization. Canonical action research was used in three cycles (Davison *et al.*, 2004) to implement a competitiveness strategy. The iterative process used here is also reflected in the second article in this special issue (Engström *et al.*, 2023) and is a common trait in action research (Coghlan and Shani, 2018).

The fifth article, by Constance Elizabeth Kampf, Charlotte J. Brandt and Christopher G. Kampf, uses participatory action research (Kemmis and McTaggart, 2005). It shows how action research supports building legitimacy and organizational learning in innovation projects.

The next two articles use design research (van Aken *et al.*, 2016) and action design research (Sein *et al.*, 2011), respectively. The article by Telmo Antonio Henriques and Henrique O'Neill shows how design science research can be combined with focus groups, and used together with information systems projects undertaken in a teaching setting (master's and DBA students). The article by Mogens Frank Mikkelsen and Kirsi Aaltonen is about IT-enabled management of complexity in projects using action design research as a methodology. Some would argue that action research and design research are two adjacent methodologies (Davison *et al.*, 2021), while the guest editors of the two special issues see them under the overall umbrella of action research (Svejvig *et al.*, 2021).

The final article, by Turid Borgestrand Øien, uses ethnographic action research (Hartmann *et al.*, 2009; Smith, 2021) to study knowledge production between academia and health practices in a project on lighting and low-vision rehabilitation.

The eight articles are diverse and show how action research with all its variants can advance the theory and practice of project studies and the project management field. This second special issue together with the first special issue (Svejvig *et al.*, 2021) provides a solid

Authors	Title	Category	Type	Sector	Theory	Purpose	Design/methodology	Findings
Coghlan et al. (2023)	Enhancing the quality of project management through action research	Action research in general	Conceptual	General	Action research and project management theory	To bring the quality characteristics of action research to project management and explore how these characteristics of well-designed and executed action research can inform and enhance the practice of project management	A reflective article	The article identifies five imperatives in bringing together action research and project management. The authors argue that project management may be conducted in a manner that is rigorous, reflective and relevant
Engström et al. (2023)	Knowledge creation in projects: an interactive research approach for deeper business insight	Practice-based research Collaborative research	Empirical	Small and medium-sized manufacturing companies in Sweden	Knowledge creation	To shed light on different types of knowledge created and how this links to the project design, process and content	Investigation of participants' experiences from a three-year interactive research project	The study resulted in five categories of insights with the potential for sustainable influence on the participating organizations: an understanding of concepts and theories; an understanding of the impacts of collaborative, reflective work processes; an understanding of the meaning of one's organizational context; an understanding of the importance of increased organizational self-awareness; and an understanding of the potential for human interaction and communication

(continued)

Authors	Title	Category	Type	Sector	Theory	Purpose	Design/methodology	Findings
Jalocha et al. (2023)	Conflicting or co-existing logics – doing action research within the framework of a project in a university	Action research	Empirical	University	Institutional logics	To illustrate how three different institutional logics present in the implementation of action research interact in a formalized project in a traditional university setting	The article is empirical in nature and the research method used is an instrumental case study	The study indicates that action research, project management and university management follow different "logics". The dominant logic of action research is problem-solving, while that of project management is efficient and university management is compliance. These different logics and their relationships with each other are explained
Silva et al. (2023)	The value of project management to competitiveness: key factors from a holistic and practical perspective	Action research	Empirical	Automotive industry	Value of project management	To address the literature gap that concerns the relationship between project management and the organization's competitiveness, proposing a holistic conceptual model to understand how project management brings value to the organization	The article starts with a systematic literature review to develop a conceptual model of project management's value. The model is validated in an empirical setting	The results have theoretical and practical implications. An original conceptual model is developed – the value of project management: Key factors – defending a multidimensional and holistic perspective to understand project management's value. A set of key factors was identified, structured and interrelated, and their practical implementation in a single company exemplified

Table 1.

Authors	Title	Category	Type	Sector	Theory	Purpose	Design/methodology	Findings
Kampf et al. (2023)	Using action research in innovation project management: building legitimacy and organizational learning in an SME during a merger process	Participatory action research	Empirical	Small and medium-sized company	Organizational learning and knowledge management	To explore how the process of action research can support building legitimacy and organizational learning in innovation project management and portfolio practices in merger contexts	Meta-reflection on method issues in action research through a case study with an innovation group during an organizational change process	Key findings include (1) demonstrating how action research can be used for building legitimacy through visualizing the innovation process, and embedding those visuals in top management practices of the organization; and (2) demonstrating how action research can work as an organizational learning tool in merger contexts
Henriques and O'Neill (2023)	Design science research with focus groups – a pragmatic meta-model	Design science research	Empirical	Information systems project in a university setting	Design science theory and focus group theory	To present a pragmatic and systematic approach to conducting and documenting design science research activities with focus groups, exploring its continuous use and providing traceability between problems, requirements, solutions and artifacts	The approach is to produce a meta-model for design science research with focus groups. The artifact is the result of a literature review and was tested in real information systems implementation projects	Rigorous and committed stakeholder engagement is a critical success factor in complex projects. The main outcome of this research is a specific meta-model for design science research with focus groups that deliver new insights and practical guidelines for academics and professionals conducting and documenting real-world research and development initiatives deep-rooted in stakeholders' participation

(continued)

Table 1.

Authors	Title	Category	Type	Sector	Theory	Purpose	Design/methodology	Findings
Mikkelsen and Aaltonen (2023)	IT-enabled management of project complexity – An action design research project	Action design research	Empirical	General	Complexity theory	To investigate the research of prescriptive knowledge on the management of project complexity	This article uses action design research to study the management of project stakeholder complexity	The findings are presented using the affordance theory as a framing concept and give special attention to affordance perception. Among the project managers, who were very engaged in the co-design, the majority refrained from activating the information system and got the outside view from the stakeholders
Øien (2023)	Methodological considerations in collaborative processes: a case of ethnographic action research	Ethnographic action research	Empirical	Health practices	Action research Concept of staging	To explore the role and implications of action research in collaboration and knowledge production between academia and health practices in a project on lighting and low-vision rehabilitation	This ethnographic inquiry has explored the methodological considerations and actions taken in a project collaboration using a framework of co-productive research approaches	Three trajectories of inquiry – a roadmap, a theoretical model and a conceptual drawing – are shown to be important elements in the translation, operationalization and dissemination of knowledge. Beyond creating an extended network, the trajectories reveal a fine-meshed interrelation within the project group that enables spaces for joint reflection, improvisation and resonance

Table 1.

foundation for doing action research in project studies and project management and thus provides a body of knowledge to project management researchers.

The guest editors hope that after reading the articles in this special issue more project management researchers will be motivated to use action research and design research 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
Department of Innovation Management, Academy of Innovation, Design, and Engineering, Mälardalen University, Eskilstuna, Sweden

References

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

Baskerville, R. and Myers, M.D. (2004), "Special issue on action research in information systems: making IS research relevant to practice–foreword", *MIS Quarterly*, Vol. 28 No. 3, pp. 329-335.

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

Coghlan, D. (2019), *Doing Action Research in Your Own Organization*, SAGE Publications, London.

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

Coghlan, D., Shani, A.B. and Coughlan, P. (2023), "Enhancing the quality of project management through action research", *International Journal of Managing Projects in Business*, Vol. 16 No. 1, pp. 9-21.

Davison, R.M., Martinsons, M.G. and Kock, N. (2004), "Principles of canonical action research", *Information Systems Journal*, Vol. 14 No. 1, pp. 65-86.

Davison, R.M., Martinsons, M.G. and Malaurent, J. (2021), "Research perspectives: improving action research by integrating methods", *Journal of the Association for Information Systems*, Vol. 22 No. 3, pp. 851-873.

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, p. 9.

Engström, A., Johansson, A., Edh Mirzaei, N., Sollander, K. and Barry, D. (2023), "Knowledge creation in projects: an interactive research approach for deeper business insight", *International Journal of Managing Projects in Business*, Vol. 16 No. 1, pp. 22-44.

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.

Hartmann, T., Fischer, M. and Haymaker, J. (2009), "Implementing information systems with project teams using ethnographic–action research", *Advanced Engineering Informatics*, Vol. 23 No. 1, pp. 57-67.

Henriques, T.A. and O'Neill, H. (2023), "Design science research with focus groups – a pragmatic meta-model", *International Journal of Managing Projects in Business*, Vol. 16 No. 1, pp. 119-140.

Jalocha, B., Bogacz-Wojtanowska, E., Góral, A., Jedynak, P. and Prawelska-Skrzypek, G. (2023), "Conflicting or co-existing logics – doing action research within the framework of a project in a university", *International Journal of Managing Projects in Business*, Vol. 16 No. 1, pp. 45-66.

Kampf, C.E., Brandt, C.J. and Kampf, C.G. (2023), "Using action research in innovation project management: building legitimacy and organizational learning in an SME during a merger process", *International Journal of Managing Projects in Business*, Vol. 16 No. 1, pp. 92-118.

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 Publications, Thousand Oaks, pp. 559-604.

Mikkelsen, M.F. and Aaltonen, K. (2023), "IT-enabled management of project complexity – an Action Design Research project", *International Journal of Managing Projects in Business*, Vol. 16 No. 1, pp. 141-164.

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

Øien, T.B. (2023), "Methodological considerations in collaborative processes: a case of ethnographic action research", *International Journal of Managing Projects in Business*, Vol. 16 No. 1, pp. 165-184.

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

Silva, C.S., Pereira, C. and Magano, J. (2023), "The value of project management to competitiveness: key factors from a holistic and practical perspective", *International Journal of Managing Projects in Business*, Vol. 16 No. 1, pp. 67-91.

Smith, N. (2021), "Emerging from the swamp: an autoethnography on the legitimacy of action research", *International Journal of Managing Projects in Business*, Vol. 14 No. 1, pp. 231-252.

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.

Svejvig, P., Sankaran, S. and Lindhult, E. (2021), "Guest editorial: special issue on action research and its variants in project studies and project management", *International Journal of Managing Projects in Business*, Vol. 14 No. 1, pp. 1-12.

Thornton, P.H., Ocasio, W. and Lounsbury, M. (2012), *The Institutional Logics Perspective: A New Approach to Culture, Structure, and Process*, Oxford University Press, Oxford.

van Aken, J., Chandrasekaran, A. and Halman, J. (2016), "Conducting and publishing design science research", *Journal of Operations Management*, Vols 47-48 No. 1, pp. 1-8.

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.