

Researching from the Inside: Epistemological Foundations and Methodological Requirements of the Practitioner-Researcher Stance in Management Science

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ABSTRACT

A growing number of managers and executives undertake doctoral research on their own organisation or sector. This dual stance of practitioner-researcher is often viewed with suspicion: it is criticised for a lack of distance, a risk of confirmation bias, and access to the field that is privileged but biased. This paper argues that intimate knowledge of the field can become an epistemological resource rather than a bias, provided that it is instrumented. It first reviews the debate between research from the inside and research from the outside. It then draws on four theoretical foundations: tacit knowledge, reflective practice, engaged scholarship and pragmatic constructivism. It identifies four critical moments of the dual stance (access, data collection, interpretation and reporting) and proposes a model of instrumented reflexivity that matches each moment with specific control mechanisms. An application to the banking sector illustrates the operational relevance of the model. The paper thus offers a framework for legitimising research conducted from the inside, useful to practitioner doctoral students, their supervisors and doctoral schools.

Keywords: practitioner-researcher, insider research, reflexivity, epistemology, engaged scholarship, tacit knowledge, reflective practice, management science, banking sector

1. INTRODUCTION

Management science doctoral schools are welcoming a growing number of experienced professionals: branch managers, finance managers, public service executives and company directors. Many choose a thesis topic directly related to their work, or even to the organisation that employs them. This trend responds to a real demand: bringing management research closer to practitioners' concerns, a goal the discipline has long claimed for itself [1, 2].

This stance nevertheless raises reservations. The practitioner-researcher is often suspected of lacking critical distance, of seeking to confirm what he or she already thinks, or of enjoying access to the field that reflects hierarchical position more than genuine consent from the actors involved. These reservations implicitly rest on a conception of objectivity founded on the researcher's externality to the object of study.

This paper challenges that conception without ignoring the real risks of the dual stance. It asks the following question: **under what conditions can intimate knowledge of a field, acquired through professional practice, become a legitimate epistemological resource rather than a source of bias?**

The paper adopts a conceptual approach. Section 2 reviews the debate between research from the inside and research from the outside. Section 3 identifies the epistemological foundations that legitimise the practitioner-researcher stance. Section 4 analyses the critical moments at which this stance exposes research to specific risks. Section 5 proposes a model of instrumented reflexivity and applies it to the banking sector. Section 6 discusses the contributions and limitations of the model.

2. THE DEBATE BETWEEN RESEARCH FROM THE INSIDE AND RESEARCH FROM THE OUTSIDE

2.1. *The Origins of the Debate*

The question of the researcher's position in relation to the object of study is long-standing in the sociology of knowledge. Merton [3] formulated it explicitly by contrasting two doctrines. According to the *insider* doctrine, only members of a group can truly understand its experience. According to the *outsider* doctrine, only an external observer can access knowledge free from the group's interests and prejudices. Merton concluded that neither doctrine is tenable in its absolute form, and that each position gives access to different forms of knowledge.

In organisational science, Evered and Louis [4] took up this distinction by contrasting inquiry from the inside and inquiry from the outside. The former, based on immersion and experience, seeks situated knowledge that is useful for action. The latter, based on detachment and measurement, seeks generalisable knowledge. The authors stressed that these two modes are complementary rather than competing.

2.2. *From Suspicion to Legitimation*

For a long time, research from the inside was tolerated rather than recognised. Brannick and Coghlan [5] argued for its full legitimacy. In their view, familiarity with the organisation is not an obstacle in itself. On the contrary, it offers three assets: a fine-grained prior understanding of how the organisation works, access to information and actors that are difficult for an external researcher to reach, and knowledge of the organisation's language and implicit codes. These assets, however, have a downside. Coghlan [6] identifies three difficulties specific to research conducted from the inside: preunderstanding, which may lead the researcher to take for granted what should be questioned; role duality, a source of loyalty conflicts; and internal organisational politics.

The debate has thus shifted. The question is no longer whether research from the inside is legitimate, but **how it can be made rigorous**. It is this second question that the present paper addresses.

3. EPISTEMOLOGICAL FOUNDATIONS OF THE PRACTITIONER-RESEARCHER STANCE

Four schools of thought make it possible to ground the epistemological legitimacy of the practitioner-researcher. Each sheds light on a different dimension of his or her potential contribution to knowledge.

3.1. *Tacit Knowledge: What the Practitioner Knows but Cannot Say*

Polanyi [7] showed that "we can know more than we can tell". A large part of human knowledge is tacit: it is embodied in gestures, judgements and intuitions without being articulated. Nonaka and Takeuchi [8] transposed this idea to organisations, showing that knowledge creation relies on the conversion of tacit knowledge into explicit knowledge.

The practitioner-researcher possesses precisely such a stock of tacit knowledge about the field, accumulated over the years. This knowledge enables him or her to identify phenomena that an external researcher would not see, to ask more relevant questions and to interpret weak signals. Doctoral research can then be understood as a process of making this knowledge explicit. But this process requires discipline: tacit knowledge that is not questioned remains a set of prejudices.

3.2. Reflective Practice: Thinking in Action

Schön [9] criticised the model of "technical rationality", according to which professional practice consists in applying scientific knowledge produced elsewhere. He contrasted it with the figure of the reflective practitioner, who produces knowledge through reflection in action and on action. Professional situations are often unique, uncertain and conflictual; in them, practitioners construct framings and test hypotheses in situ.

From this perspective, the practitioner is not merely an informant for research: he or she is already, in a sense, a producer of knowledge. Argyris, Putnam and Smith [10] extended this idea with "action science", which aims to produce knowledge that is both valid and usable by actors. They emphasise the frequent gap between espoused theories, which actors claim to follow, and theories-in-use, which actually govern their behaviour. This gap also concerns the practitioner-researcher, which grounds the requirement for reflexivity.

3.3. Engaged Scholarship: Co-Producing Knowledge

Van de Ven [2] proposes the model of *engaged scholarship*, a participative form of research in which researchers and practitioners mobilise their respective perspectives to understand a complex problem. He starts from the observation of a gap between management research and practice, and argues that this gap is less a problem of disseminating results than a problem of producing knowledge.

The practitioner-researcher embodies, in a single person, the encounter that Van de Ven calls for. This situation is both an asset and a risk. It is an asset because translation between the two worlds occurs naturally. It is a risk because the confrontation of perspectives, which is the strength of engaged scholarship, presupposes a plurality that the dual stance tends to absorb. Hence the need to reintroduce this plurality deliberately, through mechanisms of confrontation.

3.4. Pragmatic Constructivism: Value through Actionability

Pragmatic constructivism provides an epistemological framework consistent with the three preceding schools of thought [11, 12]. It makes no claim to knowledge of reality as it is independently of the observer. It judges the value of knowledge by its capacity to inform action relevantly. In return, it requires the researcher to make explicit and justify each of his or her inferences.

Within this framework, the researcher's involvement in the field is not a defect to be neutralised. It is a given to be made explicit. The question is no longer "is the researcher neutral?", but "has the researcher made visible his or her position and the way it may have shaped his or her interpretations?". This requirement echoes the notion of reflexivity developed by Bourdieu [13], for whom objectifying the subject of objectification is the condition of rigorous knowledge, as well as by Alvesson and Sköldbberg [14].

Table 1. Four Foundations of the Practitioner-Researcher's Legitimacy

Foundation	Key authors	Contribution to the practitioner-researcher	Resulting requirement
Tacit knowledge	Polanyi [7]; Nonaka and Takeuchi [8]	Access to embodied knowledge of the field	Make this knowledge explicit and question it
Reflective practice	Schön [9]; Argyris et al. [10]	The practitioner as a producer of knowledge	Confront espoused theories with theories-in-use
Engaged scholarship	Van de Ven [2]	Encounter between scholarly and practical perspectives	Reintroduce the plurality of perspectives
Pragmatic constructivism	Le Moigne [11]; Avenier [12]	Value of knowledge through its actionability	Make one's position explicit and justify one's inferences

Source: Author

4. THE CRITICAL MOMENTS OF THE DUAL STANCE

The foundations presented in Section 3 legitimise the practitioner-researcher stance, but they do not protect it against its risks. These risks do not appear diffusely: they are concentrated at four moments in the research process.

4.1. Access to the Field: Consent or Submission?

Access is the practitioner-researcher's most obvious asset. He or she knows the people involved, knows where the data are and can open doors that would remain closed to an external researcher. But this access is ambivalent when the researcher holds a hierarchical position. An employee asked for an interview by his or her superior can hardly refuse. Consent is then not fully free, and responses are likely to be shaped by what the employee thinks the superior expects. The problem is both ethical and epistemological: the data collected reflect the hierarchical relationship as much as the phenomenon under study.

4.2. Data Collection: The Blinding Effect of the Obvious

Familiarity with the field facilitates data collection, but it can also impoverish it. What seems obvious to the practitioner is not questioned; what is habitual goes unnoticed. This is the difficulty of preunderstanding identified by Coghlan [6]. The practitioner-researcher risks not asking the naive questions that often give rise to discoveries, or failing to record as data situations that he or she experiences every day.

4.3. Interpretation: Confirmation Bias and Loyalty Conflict

Interpretation is the most exposed moment. The practitioner comes to the field with convictions forged by experience, sometimes with positions publicly defended within the organisation. The risk is to read the data in light of these convictions, retaining what confirms them and minimising what contradicts them. Added to this cognitive bias is a loyalty conflict: how can one freely interpret data that call into question decisions made by the organisation that employs the researcher, or even decisions the researcher made personally?

4.4. Reporting: Speaking without Harming

Finally, reporting raises specific questions. The practitioner-researcher continues to work in the organisation after the defence. He or she may be tempted to soften disturbing findings out of professional

caution. Conversely, he or she may be suspected of using the thesis to settle scores or to promote his or her own strategic options. In addition, the confidentiality of the information collected and the anonymity of participants are harder to guarantee when the field can be identified from the researcher's very identity.

Table 2. The Critical Moments of the Practitioner-Researcher Stance

Moment	Asset of the internal position	Associated risk	Nature of the risk
Access	Opening doors, knowing the people involved	Constrained consent, responses shaped by hierarchy	Ethical and epistemological
Data collection	Speed, understanding of language and codes	Unquestioned assumptions, unnoticed phenomena	Epistemological
Interpretation	Fine-grained reading of weak signals	Confirmation bias, loyalty conflict	Epistemological and political
Reporting	Practical relevance of the findings	Self-censorship, instrumentalisation, fragile anonymity	Ethical and political

Source: Author, based on Brannick and Coghlan [5] and Coghlan [6]

5. A MODEL OF INSTRUMENTED REFLEXIVITY

5.1. Principle of the Model

Reflexivity is often invoked as the answer to the risks of research from the inside. In its usual form, however, it remains an individual and invisible disposition: the researcher declares having been attentive to his or her position, without the reader being able to verify it. We propose moving from declared reflexivity to **instrumented reflexivity**, that is, reflexivity embedded in concrete mechanisms that are recorded and can be checked by third parties.

The model rests on three principles. The first is the **separation of roles**: when the dual stance creates a risk, the practitioner role and the researcher role must be dissociated in space, time or persons. The second is the **reintroduction of externality**: the plurality of perspectives absorbed by the dual stance must be recreated through the involvement of third parties. The third is **traceability**: every research decision must leave a trace that makes it possible to reconstruct the reasoning followed.

5.2. Mechanisms for Each Critical Moment

Table 3. Model of Instrumented Reflexivity: Mechanisms by Critical Moment

Moment	Proposed mechanisms	Principle applied
Access	Participants approached by a neutral third party; exclusion of direct subordinates; written consent stating the right to refuse without consequences	Separation of roles

Data collection	Preliminary interview of the researcher about his or her own convictions, recorded before fieldwork; research journal kept continuously; part of the interviews conducted by an external co-investigator	Traceability and externality
Interpretation	Active search for contradictory cases; double coding by an external researcher; regular discussion of interpretations with the supervisor	Externality and traceability
Reporting	Prior written agreement with the organisation on freedom of publication; reinforced anonymisation; validation of interpretations by participants	Separation of roles and externality

Source: Author

Two mechanisms deserve particular attention. The first is the **preliminary interview about one's own convictions**. Before entering the field, the practitioner-researcher undergoes an interview, conducted by the supervisor or a colleague, about what he or she already thinks of the phenomenon under study. This interview is recorded and transcribed. It provides a reference point that makes it possible, at the end of the research, to distinguish what the data actually taught the researcher from what he or she knew, or believed to know, at the outset. It thus makes confirmation bias observable.

The second is the **active search for contradictory cases**. The researcher commits to explicitly seeking out situations, actors or data likely to refute his or her interpretations, and to reporting what was found. This approach transposes the requirement of refutation to qualitative research without adopting a positivist framework.

When researchers make their own experience a source of data, analytic autoethnography offers a complementary framework. Anderson [15] characterises it notably by the researcher's complete membership in the group studied, analytic reflexivity, the researcher's visibility in the text, dialogue with informants beyond the self, and commitment to theoretical analysis. These features distinguish it from a mere personal narrative and make it a tool compatible with academic requirements.

5.3. Application to the Banking Sector

The banking sector lends itself particularly well to illustrating the model, for three reasons. Banking organisations are highly hierarchical, which heightens the risk of constrained consent. They are subject to strict rules of confidentiality and professional secrecy, which complicate access to data and their reporting. Finally, ongoing transformations such as digitalisation, *open banking* and competition from non-bank players generate strongly held positions among executives, which reinforces the risk of confirmation bias. Consider a senior bank executive whose thesis focuses on adapting the branch network to digitalisation. His or her position provides access to branch managers, performance indicators and strategic documents. But the branch managers are often his or her subordinates, and the executive personally took part in the reorganisation decisions being studied. The model then leads to several concrete choices:

- Interviews with branch managers within the executive's own area are conducted by an external co-investigator, or replaced by interviews in regions or institutions where he or she has no authority.
- A preliminary interview records his or her own convictions about the future of the branch network, so that they can be compared with the findings.

- Internal data are used only after a formal agreement with the institution, specifying the conditions of confidentiality and guaranteeing freedom to publish the analyses.
- The methodology chapter of the thesis includes a section dedicated to his or her position, describing his or her role in the organisation, the decisions in which he or she took part and the mechanisms put in place.

This application shows that the model does not seek to neutralise the practitioner's position, which would be impossible, but to make it visible and controllable. It is this visibility that turns involvement into a resource.

6. DISCUSSION

6.1. *Contributions*

The paper makes three contributions. The first is a **theoretical articulation**: it brings together four schools of thought, often mobilised separately, to ground the epistemological legitimacy of the practitioner-researcher. Tacit knowledge justifies the value of his or her knowledge of the field; reflective practice makes him or her a producer of knowledge; engaged scholarship situates his or her contribution within the rapprochement between research and practice; and pragmatic constructivism provides the epistemological framework that makes these contributions compatible.

The second contribution is **analytical**. By locating the risks of the dual stance at four specific moments, the paper moves beyond the general criticism of a "lack of distance". It makes it possible to identify where and how rigour is threatened, and therefore where to act.

The third contribution is **methodological**. The model of instrumented reflexivity turns an often incantatory requirement into concrete and verifiable mechanisms. It extends the work of Brannick and Coghlan [5] and Coghlan [6], who identified the difficulties of research from the inside, by proposing operational responses tailored to each of them.

6.2. *Implications for Doctoral Schools*

For doctoral schools, the paper suggests explicitly recognising the specific nature of practitioner doctoral students. Three measures could contribute to this: including a module on research from the inside in methodology training; requiring, in the thesis proposal, a section describing the doctoral student's position and the planned mechanisms; and recommending co-supervision or a monitoring committee that includes a member from outside the sector under study.

6.3. *Limitations and Avenues for Future Research*

The paper has two main limitations. It is conceptual in nature, and the effectiveness of the proposed mechanisms remains to be demonstrated empirically. It also focuses on the practitioner-researcher studying his or her own organisation, and does not address related situations, such as that of the consultant-researcher or intervention research, which raise partly different questions.

Two avenues for future research follow. The first would be to study theses by practitioner-researchers in order to observe which mechanisms they actually use and with what effects. The second would be to conduct interviews with practitioner-researchers and their supervisors, in order to understand how the dual stance is experienced and negotiated over the course of the thesis.

7. CONCLUSION

The practitioner-researcher is neither a second-rate researcher nor a privileged observer exempt from the requirements of rigour. His or her position provides access to knowledge that the external researcher

cannot reach, but it exposes him or her to risks the latter does not face. This paper has argued that the legitimacy of this stance does not depend on the researcher's neutrality, which is impossible, but on his or her ability to make that position visible and controllable.

The proposed model of instrumented reflexivity translates this requirement into concrete mechanisms, organised around four critical moments and three principles: separation of roles, reintroduction of externality and traceability. At a time when management science is seeking to narrow the gap between research and practice, the practitioner-researcher can become one of the agents of this rapprochement, provided that his or her proximity to the field is treated not as self-evident, but as an object of method.

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