Developing in-company research: a French review of observation strategies

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Abstract
Looks at the changes in management science methodology brought about by other fields of knowledge and how this has influenced the views of researchers. Draws the main lessons to be learned from this and thus paves the way for direct observation. Develops a set of prerequisites for in-company observation which are capable of providing valid insights for management sciences. Concludes that the advantage of such an approach is researchers receive a greater realism and depth to their study of organisational practices which in turn makes the resulting methodology more useable in practice.

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Introduction

With new epistemological references being brought into management sciences from other fields of knowledge, the present view that many researchers have of their methods is destined to change considerably (David *et al.*, 2000; Louart and Penan, 2000; Thiétart, 1999; Louart and Desreumaux, 1997; Brabet, 1993; Martinet, 1990; Cohen, 1989). This change of perspective should affect, in particular, the long-established investigation procedure, used in much field research, of direct observation. The foundations of this procedure have, in fact, been simultaneously challenged and regenerated by the increasing influence, over the last 20 years, of the constructivist paradigm in social and management sciences, as well as by various convergent contributions from ethnology or ethnopsychiatry, social psychology or sociology.

Our objective is to draw the main lessons of this interdisciplinary effervescence by means of a series of critical and synthetic considerations, and thereby pave the way for a "new" methodological ethics of direct observation. In so doing, our aim is neither to draw up an elaborate list of practical details for field work, nor, even, to tackle the observation transcription phase, which obeys its own laws and obligations. Rather, we view this paper as proposing a set of prerequisites for an in-company observation capable of providing valid insights for "management sciences".

Observation revisited by constructivism

One of several investigation methods, direct observation has never been very popular with researchers in the field of social and management sciences. This is true, moreover, of researchers working as much with a normative paradigm as with an interpretative one, despite the fundamental difference – underlined by Wilson (1970) and Wieder (1974) – that separates the two approaches. For, in spite of a recent academic breakthrough (see, for example, Wacheux, 1996; Charue-Duboc, 1995), direct observation is still generally considered by die-hard experimentalists and by "ultra-clinicians" alike as something apart, irrevocably tainted by empiricism.

Observations on observation

At first sight, science can only ever be experimental: researchers must be able to study the "behaviour" of clearly identified and isolated variables, in the context of a situation they themselves have created and where they are in control of random factors (Pras and Tarondeau, 1979). This is why direct observation, where the variables overlap and interfere with each other, is considered to lack sufficient accuracy by experimentalists (Chanlat, 1998; Aktouf, 1987).

This observation procedure is at best tolerated as an exploratory method. As such, whilst not lacking in heuristic virtues, its methodology hardly attracts researchers, for whom the only thing that counts is the wealth of data obtained (Feyerabend, 1979). As for the scientific validation of hypotheses elaborated through observation, this is carried out by means of other techniques such as questionnaires, interviews, or the collection and analysis of document content.

But direct observation deserves a status better than that of a mere preliminary to experimentation, since it possesses an epistemological specificity not shared by rival methods. In the case of a survey by means of questionnaires, interviews, or the analysis of documents, it is the actors within a certain situation who themselves report on what they have seen or usually see in the circumstances relative to the study. Yet, no phenomenon should be reduced solely to what "participants" may have to say about it.

This point precisely has been stressed by a number of authors in sociology (Benson and Hugues, 1983; Leiter, 1980; Cicourel, 1974; Bourdieu *et al.*, 1973; Garfinkel, 1967) and, more recently, in management sciences (Igalens and Roussel, 1998; Koenig, 1993), who note that participants inevitably speak from a position of relative ignorance since the protagonists in a given situation cannot always realise (not in a totally comprehensive way, at any rate) what is at stake in the situation (Moisdon, 1984). What participants say also inevitably depends on their capacities of verbalisation and whatever social or professional codes they are bound by – with the latter even potentially standardising the content of their testimony (Bourdieu, 1982, 1989; Bourdieu and Boltanski, 1975). One of the aims of social and management sciences is precisely to succeed in constructing a meta-discourse capable of "transcending" the representations of individuals and groups (Boutinet, 1985; Claval, 1980).

From this perspective, direct observation is the sole means of investigating "management situations" (Wacheux, 1998; Girin, 1990) which does not directly and systematically rely upon the testimony of the situations' actors themselves. The pertinence of such a method becomes obvious when the aim is to study certain common phenomena – such as daily social interactions (Castel *et al.*, 1990; Goffman, 1974), including those in a professional context (Gumperz, 1989) – which can hardly be approached by a posteriori interrogation of the individuals involved, insofar as the latter are, all in all, scarcely conscious of the automatisms they develop in the given context. Above all, in-company observation enables researchers to grasp the logic governing situations, for such logic, which is context-bound by definition, does not lend itself to "hypothetical" investigation (of the type: "what would you do if . . . ", "what happens when . . . "). It is impossible to predict which elements or categories of elements in a management situation will finally prove to be the most important insofar as both palpable, material elements and representations or beliefs may intervene decisively at any given point. Moreover, some sociologists suggest that social situations should be studied not in all their dimensions, but in relation to the way participants act (Lapassade, 1993; Champagne *et al.*, 1989; Duclos, 1986; Dawe, 1970; Junker, 1960).

That meaning we mean not to see

The picture, however, changes again when *in-situ* observation is considered from a resolutely clinical and anti-reductionist perspective. From this angle, the investigation method is no longer criticised for its lack of accuracy or methodological purity, but for what is considered its reductive and unproductive, or even fundamentally misleading, nature. The most convincing version of this argument is no doubt that developed by psychoanalysts, who consider their "object", the psyche, as a hypothetical entity that cannot be delimited by exterior observation methods (Freud, 1916). It is true that intra-psychic processes (especially those referred to as "primary") are by definition excluded from behavioural investigation (Blondeau, 1999). Accordingly, when Freud (1905) inquires into infantile sexuality, he does not observe in the strict sense of the word, but nor has he any hesitation in elaborating hypotheses concerning the unobservable.

Moreover, from the psychoanalytic point of view, observation is considered misleading, because pseudo-naturalistic (Widlöcher, 1995; Assoun, 1993). It supposedly encourages us to believe that reality consists effectively in what we see before us, whereas there is, in fact, "another scene", that of the unconscious, and, more generally speaking, that of thought and feeling. Thus, to adhere to the immediately perceptible is to be condemned to illusion and the fascination of the mirage, while, by the same token, ignoring or circumventing that "other time" and "other place", to which only speech and language can give access in the secret and silence of the analytical consulting room (Lacan, 1953, 1966a, b, c, d, e, f). The process of thought as such, writes Pontalis (1987), is set in motion when attention is wrenched away from seeing, with this act needing to be repeated over and over again for as long as the image exercises an active attraction. By placing the armchair behind the couch, the psychoanalyst gives a concrete expression to this division of sight and thought. He or she institutes loss of sight as a condition of thought (Loraux, 1987).

Psychoanalysis has, without a doubt, had an enormous influence on numerous fields of the social sciences during the past 40 years. This influence has gone hand in hand with a certain disinterest in observation methods, and a corresponding emphasis on focused interview techniques and discourse analysis, on the part of researchers. Schools drawing inspiration from psychoanalysis in the field of organisational research similarly give little place to methods stressing the "observing conscience" (Lévy, 1998). Admittedly, the social impact of these schools remains limited (and even marginal in the

strict field of management sciences) (Le Goff, 1992), yet this does not mean that their reluctance to make substantial use of direct observation should not be taken into account. We should, in fact, recognise that the aim dictates the method (Berry, 2000). For instance, if the intention is to study "organisational phantasies" in a company (Enriquez, 1992, 1997; Moingeon and Ramanantsoa, 1997; Lapierre *et al.*, 1992, 1993, 1994), the best basis for study is the symbolic and linguistic "material" (the testimony of the organisation's actors) collected during non-directive interviews (Arnaud, 2002, 1998). On the other hand, if the aim of research is to describe "management practice" (Dumez, 1988), then surely direct observation of such practice can hardly be neglected. It is a question of knowing what one is looking for (Kohn, 1985).

Towards a constructive constructivism

Numerous authors warn against the illusions of perception, and draw attention, more broadly, to the way in which observations inevitably tend to undergo a distortion due to "subjective" factors such as the researcher's specific areas of interest and his or her past experience, motives, intellectual choices or ideological a prioris (Bourdieu, 1993a). While we wish to state that we fully adhere to the principle of this methodological precaution, we would equally like to point out that the terms in which this precaution is couched are neither innocent nor neutral with respect to the "solutions" envisaged, but refer implicitly to "positivist epistemologies", such as realism, logical empiricism or rational materialism (Le Moigne, 1995).

Reference to illusion, distortion or deformation implies the existence of an ontological reality that is univocal in essence and independent of the observer. From this perspective, observation as a research strategy should ideally tend towards objectivity (as dictated by the nature of the object), or, in other words, aim at constructing – asymptotically, as it were – as faithful and precise a record as possible of that reality as such. The introduction of any element whatsoever that is specific to an idiosyncratic observer is tantamount to a subjective "impurity" and represents an "artefact" that must be avoided or eliminated. As a result, such a position has as its backdrop a (naïve) belief in the validity and purity of our perception (Fraisse, 1985).

The advent of the constructivist paradigm within the scientific universe has perturbed this positivist perspective. Ontological reality is no longer in "line of sight", for it is literally unthinkable (even "impossible") (Lacan, 1975). The fact is that the observer, as a conscious subject, has access only to representations of reality expressing his or her experience of the world: everything is a construction of the mind (Blanchet and Gotman, 1992; Watzlawick, 1978). Thus, research (especially in social and management sciences) can never simply consist in compiling a more or less complete "collection" of informative data – as has been claimed somewhat hastily, out of habit or for reasons of simplification – but must constitute a veritable "production" (or even "co-production") of such data (Le Moigne, 1987a, b, 1988, 1990; Bachelard, 1938, 1968). Observers can only elaborate what they see, and are themselves their own research tools.

Indeed, this call for observers to take up an active position has attained such proportions that a sociologist as well known as Bourdieu has been led to suggest, in contradistinction as much with his previous work as with an entire sociological tradition insisting on the observer's neutrality and the need to respect the fundamental system of thought of the individuals under study, that researchers should fully assume a role of "bringing to light". At least, this is the approach he adopts in *The Weight of the World* (Bourdieu, 1993b), a text totalling some 1,000 pages of which almost two-thirds consist of the simple retranscription of interviews conducted in accordance with a principle of "participant objectification" by which interviewees are made conscious of the social determinants underlying their distress, as espoused by a theory of domination that the interviewer has long mastered.

Keeping our methodological considerations in mind, we would now like to attempt to define the main categories of variables that influence researchers during observation. Setting aside for the moment the contextual variables inherent to the observer-observee relationship (which we shall turn to later), we can already state there to be three main constructivist parameters, which may be identified as intellectual, social-cultural and affective in nature (Olivier de Sardan, 2000; Ben Slama, 1989).

More than meets the eye

In the course of observation, researchers create meaning from both constituted knowledge and the context of analysis to which they more or less explicitly refer (Kohn and Nègre, 1991; Mouchot, 1986). Indeed, because there are no "natural" articulations of reality, researchers are primarily guided by the problematics of their research, defining both the demarcation of the objects under study in a given field of

observation, and the way in which these objects are interpreted (Droz, 1984; Merleau-Ponty, 1964). The problematics guiding research is itself more or less directly linked to a certain paradigm, depending on the branch of science involved (Kuhn, 1977). But this link inevitably poses a "*Gestalt*" problem, inasmuch as the use of any alternative paradigm to decipher data is thereby rendered impossible (Althusser, 1967). The danger for researchers is that they may no longer be able to recognise their epistemic "filter" as such, with their theory thus becoming an ideology or doctrine (Morin, 1993). By making it possible to rationalise partisan preferences, this mechanism acts, unbeknownst to the researcher, like a blind spot, obstinately impeding perception of irksome data, which are then declared to be absurd or erroneous (see Festinger, 1957).

Moreover, as Kohn and Nègre (1991) have shown, there is an inevitable bias introduced into observation as a function of the person or group for whom the research is intended. While rarely taken into account in analysis of observational data, the client or intended public is a third party that ineluctably plays a part within the observer-observee "dyad". Where field management research is concerned, the relationship between the researcher and the company forming the site of his or her intervention is frequently the object of a more or less formal contract that sets the researcher certain obligations (e.g. the need to respond to certain operational preoccupations and demands of the client) in return for access to the field and, possibly, company funding (Benghozi, 1990).

In order for a "company" – i.e. the management or a fairly high-level executive, or even a representative group of personnel – to give a researcher permission for observation, the advantages of such an intervention (personal or collective satisfaction, notoriety, or a solution to problems, for example) must outweigh or at least counterbalance the inconveniences that the presence of an "outsider" is liable to incur, such as loss of time, risk of disorganisation, confidentiality problems, and so on (Riveline and Matheu, 1983). Researchers must, therefore, find a compromise between their own research projects (knowledge logic) and the problems identified by key decision-makers within the firm (action logic) (Berry, 1984), with this compromise inevitably having an effect on the production of observation results. In any case, researchers will only ever be able to observe "properly" those aspects of organisational functioning that they have explicitly been granted access to, in light of the reasons for their presence. This is in no way a matter of a simple constraint that can eventually be overcome, but, on the contrary, a cognitive and "political" consequence following on from the place of the observer within the organisation.

On researchers' blindness

In addition to researchers' theoretical roots, their socio-cultural references equally influence observation. These references shape the mental categories that enable researchers to decipher immediately a large part of the observed reality: stereotypes, standards, values and other social representations (Jodelet, 1996; Pinto, 1989). These automatic reaction patterns (Balint, 1966) are transmitted to us from birth via the family and tradition and then later by school, "habitus" and social communication (Bourdieu, 1980). To some extent, they evoke – *mutatis mutandis* – the "imprinting" of ethologists, by virtue of which a fledgling, for example, may take the first living being it distinctly sees on emerging from the egg for its mother (Lorenz, 1973). But there is an ethical and epistemic difference between a young bird and a human observer. The latter – as a subject – can aim at becoming aware, as far as possible, of the registers forming the background of his or her thought and perception (Foucault, 1966). If he or she fails to do this, his or her socio-cultural roots may be transmuted into an ethnocentrism producing literally "blind" value judgements.

Such ethnocentrism obviously comes more into play when researchers are required to "cross boundaries" in one way or another in the course of their research (by intervening, for example, in a foreign organisation or a French company with a high percentage of employees from other countries). However, a more insidious form of ethnocentrism – which we might call categorical or professional – also threatens observers when they deal with more "typical" companies, insofar as their apparent social proximity to the actors under observation makes it difficult for them to perceive "non-exotic" specificities (Loubat, 1988; Durning, 1987).

It should be noted that these difficulties have often been examined within the social sciences, and that diverse responses have been proposed, without any consensus having been reached as to the solution that should be adopted. For instance, ethnomethodologists advocate the "conversion" of the researcher (who, therefore, becomes the phenomenon under study) while social scientists working within the Chicago school tradition precisely refuse such an approach ("no going native") (Lapassade, 1996).

Psychopathology of daily vision

One could hardly expect an affective dimension to be absent from observation as an act aimed at creating meaning (Freud, 1915; 1919). So it is not really surprising that the personality test generally considered most "revealing" by specialists is the famous Rorschach test, in which subjects' description of what they see when observing ink blots is used as a means of inferring their range of interests, the strength of their motives, or the nature of their resistances and anguishes (Anzieu, 1960).

This has often been denounced by methodologists (see Muchielli, 1988) as a projection error. As the term suggests, this is a phenomenon in which observers project their own desires, fantasies, emotions, expectations or psychological defence mechanisms onto the situation observed (as onto a screen) – and, indeed, do so to such an extent that observation is said to reveal more about the observer than about the object of observation. This is an unconscious psychological process, ignored in good faith, which may be so powerful that observers see only what suits them, hear only what they wish to, and forget what is unpleasant or emotionally painful.

Psychoanalysts would say that the observer's "pathology" oscillates permanently between a neurotic position and a psychotic one (Pelsser, 1989). Neurotics do not deny "reality"; they simply repress uncomfortable or unpleasant visions, with these thus being relegated to the level of the unconscious. Such cases are not that unusual among field researchers: Devereux (1980) quotes as an example how, in the course of his research on the alcoholism of Mohave Indians, he suppressed anxiety-forming observation data due to his irrational aversion for drunkenness (an "omission" which was pointed out to him by a psychologist friend). As for psychotics, they fail to distinguish between the desire for an "object" and its visualisation. They deny that the two do not tally, and when comparisons are made, refuse the intolerable visual representation, replacing it by arbitrary data (Lacan, 1955). Fortunately, cases of psychotic researchers appear to be far more unusual than those of neurotic ones – even if Halbherr (1987) notes the paranoiac (and thus, psychotic) attempt by researchers to discover, in their field of investigation, something which fills a psychological need that is proper to themselves.

Mirror, mirror on the wall . . .

From the above it is clear that the philosophy of observation changes radically in the constructivist perspective. It is no longer a question of tracking down artefacts – those cognitive, affective and cultural biases which obstruct access to authentic understanding – in order to reduce or, better still, eliminate them, as in positive science. Rather, direct observation requires taking the full measure of the subjective determinants that are inevitably comprised by an act aimed at creating meaning, so as to be able to limit these, control their impact and clarify them for future readers. From this perspective, the compulsive quest for objectivity by means of the researcher's "self-neutralisation" amounts to nothing more than a way of evading or hiding one's own implication (Muchielli, 1988), or even a defensive use of scientific requirements (Devereux, 1980; Laplantine, 1973).

If objectivism is carried too far, observation is rendered aseptic and becomes purely "extrospective", along the lines of behaviourism. In social and management sciences, researchers can be led in this way to omit from their investigations what is, no doubt, the most essential element: the production of meaning by observed subjects (Barus-Michel *et al.*, 1997; Calpini, 1984). Moreover, as Morin (1984) points out, we must ask ourselves if the scientific vision really requires the elimination of any and all form of project, finality, actor, or subject. Is the suppression of the "self", as author of this scientificity, scientific? Constructivists answer these questions in the negative.

It is a fact that researchers observe and, of necessity, "speak" from a certain "epistemic position", made up of desires, opinions and hypotheses, among other things (Joly, 1992; Verspieren, 1992). If they wish to work scientifically and not condemn themselves to prejudice or self-fulfilling prophecies, it is in their interest to discover and recognise this subjective "position", to question it, take it into account, and recount it. They must attempt both to measure and bear witness to its implied theoretical context and the values connected with it, at the same time as they complement their research work by a critical consideration of the basis and conditions of their perception (Wacheux, 1996). If qualitative data cannot be experimentally reproduced, it must at least, as Koenig (1993) puts it, be able to be audited. These critical requirements and their practical consequences have recently been significantly emphasised in the field of management research (Berry, 2000; Charue-Duboc, 1995; Benghozi, 1990).

Constructing interaction between observer and observees

The constructivist perspective takes on a greater complexity and more comprehensive

meaning when considered in the context of a concrete observation situation, where observer and observees are face to face. It is clear that any direct observation of the life of a company or organisation – especially, if it is "participative" – implies the interaction of an observer and one or more observees (Avenier, 1989; Girin, 1987; Berry, 1984; Lévy, 1984). Even when the researcher says nothing and remains in the background, this interaction inevitably influences the observee(s) – as well as the observer himself or herself – and, correlatively, determines how the phenomena under examination are received.

It is for this reason that, as Piaget (1970; 1972, 1988) argued after Bohr (1961), the dualistic opposition of subject and object – which has always led to one or the other of these terms being, alternately, accorded the pride of place in the history of thought – must be transcended. As the famous psychologist and epistemologist pointed out, there is no such thing as *an* object and *a* subject, but rather a subject-object couple, governed by a process of exchange from which the two inseparable elements derive their "reality". That being the case, we should surely draw the consequences of this viewpoint, which is notably shared by Morin (1982) in sociology. Positivist epistemologies consider interaction between observer and observee(s) in terms of disturbances that affect the "ontological reality" of the situation under examination. It follows from the positivist point of view that such disturbances should, therefore, be eradicated or at any rate "minimised" by corrective measures that aim at "suppressing" interference to the situation in question. In a constructivist perspective, on the other hand, interaction between observer and observee(s) is by definition an essential condition for understanding (Avenier, 1992). Consequently, it is valued for its own sake, and researchers are required, once again, to apply "scientific awareness" by taking this interrelation of the subject and the "object-subject" into account (Bourdieu, 1993a).

Spying partners

As we have all noticed over the course of our daily lives, being observed provokes all sorts of contrasting, or even contradictory, reactions in the subjects under observation. A list of such reactions would include, amongst others:

- a tendency to keep one's distance or, on the contrary, stand in front of the observer;
- embarrassment or even paralysing anxiety;
- performing and exhibitionism;
- conformity or eccentricity; and
- hostility or even utter rebellion, or, on the contrary, docility.

Without going so far as to refer to paranoiac pathology – that "observation mania" studied by Freud – the fact is that any intrusion into a company encompasses a persecutory dimension and is rarely indifferent to those observed.

Numerous studies have, quite rightly, set up a correlation between the sort of reactions that being viewed can provoke and the observer's so-called "objective" characteristics (age, sex, appearance, ethnic group, etc.) on the one hand, and certain of his or her "attributes" (greater or lesser social standing, hierarchical rank, professional competence, image of the institution to which he or she eventually belongs, etc.) on the other (Barber, 1984). In general, such studies have aimed at criticising the defensive nature of what they consider overall to be a modification in behaviour stemming from the fear of being judged.

In fact, much research in social psychology (Cerclé and Somat, 1999; Moscovici, 1984) shows that a "shaping" of the observee by the observer takes place, according to what the former knows, imagines or thinks he or she can guess of the intentions and expectations of the latter, and the positive or negative consequences associated with these. The result is the "Pygmalion effect" (Rosenthal, 1966) which involves observees acting, more or less unconsciously, in such a way that they confirm what the researcher hopes to discover, as transmitted to them by involuntary paralinguistic signs (facial expressions, gestures, tone of voice, etc.). When this type of reaction concerns an entire group, rather than an individual, it is likely to be referred to as the "Hawthorne effect" (Mayo, 1933).

Be this as it may, such an inflection of observees' behaviour is not necessarily due to psychological plasticity or to an automatic defence-reflex relating to one's social image; it may have a more strategic or, at any rate, more tactical aim. For example, an actor or group of actors may be tempted to direct or manipulate a researcher in order to safeguard their own interest or plans (by not revealing certain internal or external facts, blocking an unwanted organisational change, starting a rumour, etc.) (Piette, 1996; Crozier and Friedberg, 1977).

In addition, such contextualised behaviour by an observee may be based on a more or less "realistic" perception of the observer as a person. Thus, a management researcher

working within an organisation may genuinely be accepted for and seen as what he or she is, namely, a "disinterested scientist", whose inclusion in the company's internal relationships is not determined by power considerations (in the broad sense of the term). This does not mean, however, that observees will put their cards on the table – even if they trust the researcher. Although not necessarily perceived as "a spy in the pay of the hierarchy", the researcher is, nevertheless, generally called upon or brought into the company by the management or a high-ranking executive, which, in fact, confers upon him or her a privileged relationship with this category of decision-makers (Matheu, 1986).

It is conceivable that the latter might use the research results to ends that the researcher himself or herself had not imagined or anticipated. In this sense, any blunder or indiscretion on the researcher's part can jeopardise employees under observation. Since the observer does not share the same risks as the internal actors he or she observes, and is able to withdraw from the company at little cost whenever he or she so wishes, observees do, indeed, have good and legitimate reasons for caution, in spite of the promises of confidentiality and anonymity that the researcher may have made, in all sincerity (Halbherr, 1987). This is why actors are permanently liable to interfere with the observation arrangements applied to them, as a way of their keeping control of the situation under study. In a sense, management research, as a strategy for understanding, always runs the risk of provoking counter-strategies of non-information, for example:

- more or less diplomatic avoidance;
- obvious flight;
- cancelled appointments;
- repeated unpunctuality; or even
- ostracism or eviction of the intruder.

It also runs the risk of provoking counter-strategies of misinformation or a surfeit of information:

- bluff;
- "seductive" behaviour;
- sudden changes of position;
- putting the researcher on the wrong track or ensuring that he or she arrives at a dead end, etc. (Dumez, 1988; Girin, 1987).

In addition, we might also mention "perverse" strategies designed to destabilise the researcher psychologically, as instanced by certain actors challenging the pertinence or validity of the research directly or indirectly (Benghozi, 1990).

The limits of Utopia

It is not unusual for a participant observer to be mistaken for something other than a simple researcher. He or she might, for example, be considered as a "veritable saviour" capable of rescuing a company undergoing serious problems, as the management's "consultant-alibi", as a spy on behalf of such or such an actor, or even as an attentive ear whose aim is to listen and pass on to "the powers that be" a certain number of claims or reproaches.

In the course of his ethnographical investigations, particularly among the Mohave Indians and the Sedang Moi, Devereux (1980) labelled "transference" this kind of relationship in which the observee takes the observer literally for someone else (he himself was taken for a shaman). In this way, Devereux was thus, in both his theoretical reasoning and concrete examples, to extend and adapt to direct observation the concept Freud introduced in a psychoanalytical context to designate the variable brought into play by the analyst in his or her clinical relationship with the patient. It is true that Breuer was the first to notice this phenomenon in his patient Anna O., who was at that time suffering from a hysterical pregnancy brought on by her unconscious amorous feelings for him. But it was Freud who drew all the theoretical and clinical conclusions: inasmuch as the patient seems to relive with the psychoanalyst a previously experienced relationship with a critical figure from the past (generally the father or mother), it is indeed a "transference". Later, Jung was to consider that transference can also take place in other circumstances, such as the daily life of human relationships, where it is evidenced by the excessive or inappropriate nature of certain reactions.

Apart from Devereux, it is doubtless Favret-Saada (1977) who has done most to exemplify the concept of transference in the context of an observation situation. She even goes so far as to consider it the real lever of field research (just as Freud considered it the "alpha and omega" of analytical treatment). As an ethnologist and sociologist, she travelled all over rural Normandy to study the importance of witchcraft in local social life. In so doing, she discovered that what she saw and heard depended to a critical extent on the symbolic position that was attributed to her in connection with the phenomenon in question. As someone occupying an "exterior" position at the beginning of her research (the typical neutral position of the researcher), she at first encountered a systematic denial of witchcraft's existence on

the part of her interlocutors: spells "don't exist" or "no longer exist" or "perhaps in other places", was the gist of the answers she was given in accordance with official culture and science. It goes without saying that she was unable to witness any spells being cast or exorcised, or observe the least sign of a magic ritual.

In such conditions, a traditional researcher might well have deemed that he or she had good reason to conclude that witchcraft has no reality in rural Normandy (for why would people lie to someone with no vested interest in local stakes?). The only drawback is that witchcraft does exist and is, in fact, a well-known practice. But sorcerers will never admit being one to a "stranger", nor will they demonstrate their spell-casting techniques. As for people who have been bewitched, they will only confide their "misfortune" to someone who may be able to free them. The result is a conspiracy of silence. There is no place for an uncommitted observer, explains Favret-Saada (1977), who had, therefore, to draw the conclusions from the agonistic situation in which she found herself and admit that it would be absurd to continue to claim a neutrality that no-one found acceptable or even credible.

After a period of fruitless research, the young ethnologist let herself – almost by chance, in fact – be "caught" by the phenomenon she was trying to study. From then on, what she was told and what she was shown varied according to the position attributed to her by her "informers". As she puts it:

1. The first time bewitched people told me their own story (rather than that of hypothetical "backward people"), it was because they had identified me as being able to free them from the spell and get them out of trouble.
2. A few months later, a farmer, interpreting my "weakness", took on the role of herald of my bewitched state and took me to someone capable of freeing me from the spell's power.
3. For over two years, I submitted the events of my personal life to the interpretation of the witch who had removed my spell.
4. Various bewitched people asked me to "free" them. Although I was perfectly capable of handling magic incantations at that point, I felt unable to take on the speech function on which they rest and took them to my therapist.
5. Eventually, the exorcising witch with whom I had formed a complex relationship (being at once her client, her agent, and a guarantor of her telling the truth in the cures in which she allowed me to participate) asked me to bring the healer who would cure her aches and to help him with his task (Favret-Saada, 1977, p. 38).

There is much that can be profitably transposed from the theories of Devereux and Favret-Saada to clinical management research methodology (Girin, 1990), and particularly in cases where the observation situation involves an intense psychological investment on the part of the actors and "political" stakes of significance (e.g. if power processes or organisational changes are being analysed). During in-company observation, researchers inevitably occupy a position (or, more likely, a series of more or less "globally strategic" positions) in the system of relationships and representations that underlies the specific situation they are exploring. They must, therefore, understand very quickly what that position (or series of positions) is so as to situate whatever they observe in relation to it, and thus be able to "decipher" what they are shown (Richardot, 1992).

It is clear from the above that a position of alleged scientific exteriority is not valid in a research context, even if it is not aggressively neutral (Durning, 1987). Indeed, it may be considered as the sole viewpoint from which absolutely nothing can be seen of certain phenomena, other than misleading stereotypes – as Favret-Saada was to discover on assuming a position of illusory objectivity at the beginning of her research in rural Normandy. To be sure, neutrality is attractive and reassuring for researchers, but it is of little use if only they really believe in it. In fact, any kind of field research in management sciences can only be carried out by accepting certain risks (Bordeleau *et al.*, 1982).

Acting or acting out

That said, Favret-Saada goes further than this non-neutrality, introducing a perspective that is even more dynamic and active, when she remarks that it is necessary for researchers who do not wish to content themselves with the position they are assigned to construct another equally credible one and take responsibility for its import. Moreover, Girin (1987) suggests that this sort of construction be worked out prior to research, by taking account of the "praxeological" positioning of the actors (whence the concept of action-research). However it may also be necessary to do this on the spot, in the heat of investigation.

This is precisely what Halbherr (1987) had to do while undertaking research at IBM France. He progressively realised that he would never succeed in observing correctly what he wanted to study as long as he remained in the position of an "objective researcher", scrutinising the company's

internal actors from the lofty confines of his "ivory tower". He therefore decided to talk about himself to the people under observation and relate his previous professional experience, his anguishes, expectations, desires and personal aspirations. He acknowledged and explained that an *ideological project* – the description of the institutional folly of a multinational crushing individuals – underlay his *scientific project*, directed at acquiring an understanding of IBM's internal life and, in particular, the workings of the department monitoring employees' opinions. He realised that it was absolutely necessary to take account of his personal commitment in his scientific activity, and explained this to those concerned. In short, he constructed his position "in", and during, the interaction he engaged in with internal actors.

The upshot of this was that the organisation's actors finally began to unburden themselves in return. In fact, faced with researchers who have adopted an attitude of non-commitment, observees tend to be inhibited by fear and suspicion and, accordingly, respond by an attitude of non-dialogue and non-action. Researchers can only hope to see such defensive barriers fall if they squarely take up a position and relate to observees on a basis of exchange.

Halbherr's way of overcoming resistance was to abandon reserve completely and adopt a resolutely interventionist attitude. This type of radical solution may indeed serve to challenge habitual ways of functioning, which the actors involved usually accept without posing themselves too many questions. As such, it is a procedure (called "breaching") that is also occasionally used by ethnomethodologists: "*just to see*" (Coulon, 1987). We can distinguish in this procedure the three different levels of a researcher's implication within his or her field of investigation that have been studied by Adler and Adler (1987):

1 marginal implication;
2 active implication; and
3 full implication.

The importance of being honest

Up to this point, we have considered research activities that are openly acknowledged (overt research) or, at least, not systematically hidden (covert research). Ideological or methodological transparency is not, however, always possible or "profitable" in companies, and tends perhaps to be the rule only when researchers' overall options coincide with, or do not run counter to, the decision-makers' organisational plans. When this is not the case, observers may be perceived as bothersome, or even downright dangerous or "subversive", and the organisation's doors will, as a result, remain obstinately closed to them (or quick to seal their peremptory expulsion). For this reason, numerous researchers, following in the footsteps of Roy (1954), have argued that "mystification" is the only research strategy possible for direct observation, particularly in industrial milieux (Kohn and Nègre, 1991).

This strategy comprises two main alternatives. The first consists in not completely revealing one's objectives. The researcher is seen by in-company actors as "out of line" – for he or she does not attempt to melt into the group under observation and remains slightly "apart" – but this is in order to hide his or her status of observer and what he or she is studying more efficiently. As a result, sociologists, who might be qualified as "pragmatic", often adopt this course of behaviour as a way of being able to exercise direct observation. For instance, Villette (1991) chose to play the part of a consultant while engaged in a long-term survey so as to be able to approach managing directors of big companies and observe leadership-related situations. In a more interventionist (or even activist) vein, we can quote the example of the socio-analyst Georges Lapassade, who, when invited to organise a conference in a Belgian university, decided on the spot to transform this into a general meeting where the public was invited to debate the principles underlying the programme the university had requested him to set up. The aim of this kind of intervention is to "make the institution speak" by means of provocation and construction of "analyser mechanisms" (Lourau, 1970).

The second alternative consists in playing the part of an actor, as, for example, by joining a factory as a worker and participating in the running of the company. This is the research strategy applied by Linhart (1978), who decided to take a job as a factory worker and integrate himself completely in "factory culture" without revealing anything of his action-research status.

Whatever the alternative chosen, the least one can say is that mystification as an observation strategy is a rather risky enterprise – without mentioning the very delicate ethical problem it raises (Kohn and Nègre, 1991). To begin with, social roles, and in particular professional roles, cannot easily be learned or imitated (Adler and Adler, 1987; Garfinkel, 1967). Yet, even if a researcher "gets inside" his or her character (as did Linhart, who came from a modest background), it is likely that the stress caused by permanent self-control (to avoid discovery), along with the daily effort of the job carried out in the context of the his

or her "front", will prevent satisfactory observation. Moreover, despite whatever precautions they may take, researcher-workers are usually seen through sooner or latter – with their "rank and file" colleagues usually being the first to detect their masquerade (Touré, 1990; Linhart, 1978). Indeed, it is interesting to see to what extent the fact of observers being "unmasked" can at times be helpful to their research, insofar as it at last offers them a chance to negotiate a position of trust within the social group under observation.

To sum up, researchers have at their disposal at least six different strategies of interaction (see Figure 1), ranging from the most "classical" (ethnography) to the most "revolutionary" (institutional intervention). The option chosen will, of course, depend on the nature of the phenomena under observation and how "delicate" the situation may or not be, as well as on the researcher's theoretical and methodological references, and the conditions of access to the survey situation. While we have attempted to cover these aspects above, we are unable to define them further in the context of this study.

Emotional investments

Researchers intervening in a company must not only analyse their position and set up a methodological framework for their interaction, but must additionally come to terms with their affective investment *vis-à-vis* observees. What we have in mind here is not the specific strategy of understanding, proper to the social sciences since Weber and Lipps, that entails that the observer identifies himself or herself with the persons observed ("comprehensive" sociology on the one hand, "empathetic" psychology on the other), and which thus involves a deliberate identification by which one subject is rendered comprehensible to another (Brabet, 1988; Gosselin, 1986; Morin, 1984; Laing, 1970). Rather, we are referring to an unconscious relationship of identification between observer and observee(s), which suddenly becomes coloured by desire or affection (Aubert *et al.*, 1997; Flavigny, 1987; Château, 1968). For instance, it is possible for observers, depending on how implicated they are in the company's internal relationships, to unconsciously identify themselves to an inordinate degree with a certain category of actors or one particular actor (e.g. the manager of the company), whose side they then take. But this selective and unperceived "indigenousness" results in a partial shifting of vision, which may lead to a purely ideological or incantatory production (Villette, 1991).

Devereux (1980) takes the analysis further by stressing that it is always possible, in

Figure 1
Six observer/field interaction strategies

		DEGREE OF IMPLICATION OF RESEARCHER-OBSERVER IN THE FIELD		
		Decentred position (remaining apart)	Inclusion "in" the phenomenon studied (finding one's place)	"Disturbing" intervention (provocation)
EXTENT OF OPEN DECLARATION IN RESEARCH	*Mystification strategy*	Genuine counterfeit duplicity E.g.: pragmatic sociology	Camouflage by cultural integration E.g.: militant sociology	Assimilation with provocative intention E.g.: institutional socio-analysis
	Openly declared or unconcealed research (no mystification)	Observation at a distance E.g.: Social Ethnography	Transferential/ counter-transferential adaptation E.g.: ethnopsychoanalysis/interactive Research	Questioning norms by extra-ordinary behaviour or events E.g.: ethno-methodology

- Emotional investments

the behavioural sciences, for observation to be reciprocal (i.e. observation and counter-observation). The fact that the observee is also the "observer of his observer" inevitably arouses a certain anguish in the observer-researcher, who consequently adopts what Devereux terms counter-transferential behaviour: by assuming, for instance, a defensive attitude, or seductive discourse. Strongly emphasising this notion of counter-transference – entailing a commitment by the researcher to his or her object – Devereux considers the idea of personal implication in research as insufficiently fertile in comparison.

In management sciences, the perspective is similar (Wacheux, 1996; Girin, 1987). After all, when a researcher arrives in a company to carry out an observation mission and finds himself or herself surrounded by employees, executives and "autochthonous" managers, the question may well be asked: who is observing whom? Halbherr (1987) repeatedly remarks that in the course of his research he was greatly influenced by this phenomenon of reciprocal observation.

To look and be wise

Many methodologists have variously stressed the danger of becoming emotionally involved with actors and the consequent need to distance oneself from "the object" (Boumard, 1988; Hess, 1988). While some insist on the adjustments and skilful balancing which need to be permanently exercised by researchers in their social practice (Callon, 1999; Bourdieu, 1984), others refer to a mixed or even "schizophrenic" attitude that researchers should adopt in order to effect – in a more structural manner – a sort of controlled immersion (Maisonneuve, 1972) or, put succinctly, a "distant familiarity" (Matheu, 1986). Yet, whatever terminology is chosen, the main thing is to avoid two entirely distinct pitfalls: on the one hand, an objectivist attitude which excludes the researcher from his or her own system and renders all personal implication taboo (Halbherr, 1987); on the other hand, an abusive self-referencing or, in other words, novel variant of narcissism, by which the researcher, under cover of discussing the relationship of the observer to the observee, in fact ends up repudiating this relationship by abolishing the observee and installing himself or herself in the latter's place (Barel, 1984).

All in all, observers should aim at remaining as aware as possible of what is at stake in their relationship to the observee, which means that, in this "*transferential-counter-transferential field*" (Kaës, 1993), they must continually monitor how they are "affected", and their own all too easily unnoticed and "unconscious" reactions. In short, to borrow a happy turn of phrase from Revault d'Allonnes (1989), they must:

> . . . learn to work in, with, and on counter-transference, to the same degree as in, with, and on transference.

Conclusion

The methodological content of direct observation takes on new meaning when viewed from the perspective of a constructivist "rereading". In our opinion, this constitutes a salutary rejuvenation for an "old" survey technique that has long suffered from an ambiguous status confining it – "mythically" – within the lofty tower of radical objectivism (behaviourism), on the one hand, while relegating it – "empirically" – to the subterranean kitchens of research (where anything is possible), on the other (Cornu, 1984).

In a famous text written in 1865, Bernard distinguished between *observation* (the examination of natural phenomena) and *experimentation* (the examination of phenomena modified by the experimenter). An entire span of his thought even tended to consider experimentation as a specific type of observation (which he defined as being "brought about" or "premeditated"): is not an experimenter *a fortiori* an observer? In the context of social and management sciences, this relation of inclusion is reversed: an observer is inevitably also an experimenter since not only is it impossible for him or her to avoid interaction with the observee(s), but this interaction, far from blocking access to understanding, constitutes, on the contrary, its generative framework.

Recognising the role of experimenter which he or she is "condemned" to play is, however, a demanding process for a researcher. The ideal of the pure observer, external to phenomena, proves to be far more comfortable, both intellectually and practically, insofar as it precisely allows the researcher to reject this type of experimental clinical procedure, or to limit it to a mere supporting role, in the name of which all sorts of expedients are authorised. Yet scientific vigilance requires that researchers make full use of their subjectivity, while, at the same time, fully exercising their will for objectivity, which takes the form of permanent self-analysis or socio-analysis (Bourdieu, 1991). Morin (1984) adds, moreover, that this dual utilisation, or dialogue, of subjectivity and objectivity is both complementary and conflictual. In short: There is struggle. There is no recipe.

That this is the case is undoubtedly the methodological price that researchers have

to pay when their scientific procedure is not aimed at isolating reproducible facts within experimental configurations but, rather, at acquiring an understanding of lived modes of functioning and dysfunctioning. So opaque and complex are such modes of actual lived experience that they present the observer with a particularly ticklish epistemological challenge, such that he or she is often led to turn to common sensical approaches as a way of compensating for his or her ignorance of the field (Beauvois, 1984). Yet, when one wants to understand, for example, how a bird flies, one is effectively much better off observing a specimen up close than scrutinising a cloud of feathered creatures in the sky, even if there are enough of them to constitute a representative sample in statistical terms. This image, used by Girin, applies equally well to a managerial universe: one often learns a lot more about management "in the working" by directly observing the way in which a manager works in her or his company than by submitting a questionnaire to a large number of managers (Mintzberg, 1979).

The advantage of such an approach is, then, that it allows researchers to bring a greater realism and depth both to their study of organisational practices and to the resulting insights, which prove for this reason to be more directly linked to the real stakes involved for the actors within the field under study. It follows that such insights are all the more usable by these actors – that is, the managers themselves.

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Application questions

1 Why might researchers, consultants or managers choose direct observation, rather than other methods of collecting data?

2 What are the different observation strategies that can be applied within firms, and what are their respective advantages and disadvantages?