INTERNATIONAL JOURNAL OF ACTION RESEARCH

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Table of Contents

Stirring the fire under the ashes of action research

Miren Larrea

I start this editorial with a sentence resonating in my mind: "no researcher can, on his or her own, make a broad impact. This can be achieved only by working together". It is a sentence by Bjorn Gustavsen that Danilo Streck cites in one of the articles of this issue. I cannot help but think that journals have an academic goal, but beyond that, they can be spaces where communities are nurtured. An action research journal is a space where action researchers around the world can meet each other through our work, our ideas and practices.

In this spirit I want to start by remembering Morten Levin, who passed away while we were preparing this issue. His work together with Davydd Greenwood was my first step into the action research community, and I started to openly say I was an action researcher only after visiting him in Trondheim with James Karlsen. Our condolences and gratitude to his family and colleagues.

Nurturing a global community of action researchers is precisely the aim of Danilo Streck in the first article of this issue entitled "Action Research, Democracy and (Global) Citizenship: Building bridges among traditions and practices". He presented these ideas initially in one of the keynote speeches of the IJAR Symposium held in Istanbul in October 2023. Streck was editor in chief of this journal for a long time and he is still a member of its editorial board. His article, I feel, represents the spirit of the International Journal of Action Research and its board of editors.

One of the core contributions of the article is a conceptual framework for comparative action research studies. It is a framework meant to operate as a bridge between different traditions and practices within action research. Therefore, it is a proposal to action researchers from different traditions to dialogue with and learn from each other. To reach this framework, Streck guides us in a stimulating journey through the contributions of four authors: two European voices and two Latin American. Through the discussions of democratic dialogue (Bjorn Gustavsen), democratic participation (Werner Fricke), popular science (Orlando Fals Borda) and people's participation (Paulo Freire) Streck builds the bridges that he invites us to cross. He thus stirs the fire under the ashes of action research with an article that he opens asking whether there is still fire under those ashes.

The second article of this issue, entitled "Dissensus as part of dialogue in organizational change processes: a case study in an NGO" departs from the work of two of the authors presented by Danilo Streck: Paulo Freire and Bjorn Gustavsen. The goal is to discuss in depth the concept of dialogue. Maider Gorostidi – Garcia, Arantxa Rodríguez – Berrio and Iratxe Aristegui – Fragua guide us through their learning process of organizational transformation in an NGO. They initially share an action research process that had apparently failed, as dialogue was not happening the way the authors had expected following the literature. However, they did not give up, and instead of accepting that result as a failure, they questioned the main-

stream theory. This questioning took them to explore new contributions that helped them re-signify dialogue. They propose the dissensus approach as useful to reinterpret their case and share how, from this perspective, the case is no longer a failure. They consequently underline the value of differences, and open a gateway to more complex dialogical perspectives.

The third article, by Nikolai Kunitsõn has the following title: "Exploring the Transformation of Habitus: a Case Study of Forum Theatre in Estonia". Kunitsõn first presents the Bourdieusian concept of habitus, and argues that it explains why subjects act in a society in a particular way. He then argues that Bourdieu said that the transformation of habitus is possible, however, he did not specify how. Consequently, he explores action research as a potential answer to transform habitus. To do this, he first builds conceptually on the work of John Dewey and Paulo Freire, and then presents a specific case where he worked with Forum Theater as a method of Participatory Action Research. In this process he worked with participants from the russophone minority in Estonia, addressing a series of issues that this group wanted to tackle – for example, miscommunication between different ethnic groups, mask-wearing in public spaces, bullying in schools and problems between pupils and teachers. The goal with the process was to see whether and how Forum Theatre as a method could change participants' habitus regarding these issues. The case shows the difficulties of measuring this kind of change, however, Kunitsõn concludes that some transformation took place.

The fourth article in this issue is authored by Barbara Mihók, Judit Juhász and Judit Gébert and entitled "Slow science and "caring" research – the transformative power of collaborative research with hard of hearing youths". It is part of a *thematic series on action research and citizen social science* guest edited by Patricia Canto and Reidun Norvoll. I invite the readers of International Journal of Action Research to see their guest editorial in this issue, where they introduce three articles that will explore this theme in this and two other forthcoming issues of the journal.

Guest Editorial of thematic series

YouCount: Action Research and Citizen Social Science

Patricia Canto-Farachala, Reidun Norvoll

How can citizen social science contribute to addressing one of the three edges of action research (AR) identified by Larrea (2022) as the stagnation of global democratisation? And how can action research's long tradition creating spaces where researchers and practitioners work together in a shared commitment to democratic social change (Brydon-Miller et al., 2003) inform the nascent citizen social sciences field?

These questions are important in the context of a democratisation turn in science policy that illustrates a heightened interest in engaging society. For instance, the European Union's Science with and for Society (SwafS) programme embraces ideal high-level aims of participatory democracy, while recognizing the need to assess the societal, democratic and economic costs and benefits of engagement (EU, 2016). Through the SwafS programme, funding has been granted to projects that explore stakeholder engagement in research and innovation in socially contested fields like artificial intelligence or the bio and nano sciences (Burget et al., 2017). Funding is also being granted to projects that explore citizen engagement in scientific projects. This approach has rapidly expanded in the natural sciences (Hecker et al., 2018), and has gradually found its way into the social sciences, where it is still an emerging approach (Albert et al., 2021).

The democratisation turn in science policy has brought to the forefront the long-standing participatory tradition in social sciences research. Indeed, action research is an umbrella term for research based on democratic and inclusive values, where democratically developed knowledge contributes to collective action. The ideal of the action research approach is the co-production of knowledge between social actors and action researchers who contribute actively to democratic change within the field where the research is conducted. Thereby, action research gives the social actors a role as "subjects" in the research process and challenges at the same time research methods, which separate the researchers and their research "object" (Clausen & Hansen, 2007). Ontologically, action research differs from objectivist inquiry that aims to examine social reality unobstructed by researchers, because the aim of action research is not to examine reality but to change it (Nicholas & Hathcoat, 2014). Action research is also defined as a strategy for change, in which quantitative or qualitative research methods may be used (Greenwood & Levin, 2007).

So how different are citizen science and citizen social science from that? In the action research literature we find an early definition of citizen science by Boyd (2014), as engaging the public as co-researchers or citizen scientists in collecting and disseminating data and results, democratising the processes of knowledge production by accepting the skills of non-specialists to research. Moreover, the opportunities that emerge from combining action research and citizen science have been analysed in a case that shows that citizen scientists transformed themselves from data collectors into builders of community knowledge using action research methods (Evans-Agnew & Eberhardt, 2019).

However, citizen social science is a novelty for social sciences, and there is not much research on the topic. A recent definition of citizen social science describes it as a form of

citizen science in the social sciences, or one that has a specific focus on the social aspects of citizen science (Albert et al., 2021). One of the first projects funded by the SwafS programme to explore citizen social science, describes it as participatory research co-designed and directly driven by citizen groups sharing a social concern and recognizes its close connection with the rich participatory tradition in social sciences and humanities (Scheller et al., 2020).

The YouCount project (hereinafter YouCount) from which the three papers included in this thematic series emerge, is another such project. It was granted funding by the Horizon 2020 SwafS programme, to explore citizen social science in practice, namely, its potential for addressing social inclusion for young people, with young people as citizen scientists. To that end, YouCount is developing 10 local case studies in 9 different European countries. The case studies are guided by the following research questions: (i) What are young people's own views on what the critical issues are for social inclusion? (ii) what are young people's experiences with opportunities for social inclusion in their daily life (social participation, social belonging and citizenship?) What new means and policies for social inclusion are needed? The project will also provide evidence of the costs and benefits of citizen social science based on open data of its scientific, social, democratic, economic and individual outcomes.

The cases develop with youths and stakeholders in living labs that involve a broad repertoire of qualitative and co-creative methods like ethnography, interviews, dialogue forums, world cafes and others. A set of co-creation principles that draw from the literature on action research for territorial development (Canto-Farachala, 2021; Karlsen & Larrea, 2014) are used to inspire communication practices during the research and dissemination stages of the research process (Butkevičienė et al., 2021). Moreover, drawing from citizen science, that uses information technologies to widen the participation scope, YouCount uses an app, where young people contribute data about their social inclusion experiences in daily life (Ridley, et al. 2022).

YouCount's overall scientific ambition is to develop citizen social science, by combining citizen science with the rich traditions from the social sciences, and their long history doing participatory action research, including the emancipatory tradition. The project's stated vision is that of strengthening the transformative and participatory aspects of citizen science and social sciences, by enabling citizen participation in all stages of the research process, aiming for a more egalitarian way of conducting science[1].

The three articles included in the thematic series on the YouCount project in this journal offer a glimpse of our progress in the way of the aforementioned objectives. They show how action research and citizen social science can be combined in different social contexts with different purposes, and can strengthen democratic social change. Moreover, by directly involving citizens, particularly young people that find themselves at risk of exclusion, they offer clues on the challenges of creating inclusive environments as a prerequisite for democratic social change.

The first article in the series, by Barbara Mihók, Judit Juhász and Judit Gébert is available to readers in this issue. The authors, who define themselves as "senior hearing academics" are developing a case in Szeged, Hungary, with hard of hearing youth as citizen scientists. Departing from a phenomenological approach to research (Papineau, 1996; McTaggart, 1994) the authors identified significant aspects where their academic functions led to inner trans-

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1   See: https://www.youcountproject.eu/about-the-project/about-the-youcount-project/concept-and-methodology

formations, helping them to recognize the overwhelming importance of relational aspects and caring and the perceived and fostered "slowness" of the research. Body communication, posture, and safety acquired an embodied knowledge on how social inclusion manifests in the physical space. This led them to reframe the notion of inclusion as a joint and interdependent transformation of all actors involved, where connections are (re-)established and the community is being defragmented.

A forthcoming article by Catherine Marie Skovbo Winther presents an actionable field-based framework to inspire high school teachers to incorporate field studies in their planning of educational material, and enable hands-on activities and a broader understanding of the local environment to inspire youth civic engagement. The framework emerges from her research case in South Harbour, Copenhagen, where students were involved as co-researchers in developing a more sustainable youth friendly district. By combining participatory action research methods with the framework of youth citizen social science, tangible field study methods for the youth to work with were developed, which sparked a do-it-yourself mentality among them to suggest sustainable changes in their local environment.

The third article in the YouCount thematic series is written by Aina Landsverk Hagen, Sara Berge Lorenzen, Frederick Reiersen, Ingar Brattbakk and Sara N. Plassnig, a research team working with young citizen scientists of diverse cultural backgrounds in Oslo, Norway. The authors explore how their diverse backgrounds in social sciences, comprised of social anthropology, human geography, social work, gender studies, aesthetic didactics, and organizational studies among others (a "cacophony of voices") have influenced how they collectively approached the concept of citizen social science as practice and process. They argue that while the mix opens the field of research for a diverse group of youth with multicultural backgrounds to be actual contributors to social science, it is also a resource intensive and demanding process of exploration and testing of methods, approaches, and trust building tactics. They suggest that this manner of making social sciences approachable and available can also bridge the divide between academia and the general population.

We hope that these articles contribute to the reflection around the stagnation of global democratisation raised by this journal. We specially hope that they show how action research and citizen social science can combine and complement each other to address that trend in practice. We still have so much to explore and to learn and, in that process, organizing this thematic series has been very important. We wish to thank the authors and the blind peer reviewers, who kindly shared their time to make it possible. Our deep gratitude to Miren Larrea, IJAR's Editor-in Chief for trusting and supporting us throughout the whole process.

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Dr. Reidun Norvoll is a research professor at the Work Research Institute at Oslo Metropolitan University (OsloMet) working with participatory (action) research together with stakeholders and various groups of citizens with disadvantages. Norvoll is currently project coordinator for the EU project 'YouCount – Empowering youth and cocreating social in-

novation and policy-making through youth citizen social science' (2021–2023). She has published widely on end-users' perspectives and user-involved research and innovation in relation to health- and social services. She has a PhD in sociology and PostDoc from the University of Oslo (UiO), both studies on development of mental health services.

Action Research, Democracy and (Global)Citizenship
Building bridges among traditions and practices

Danilo R. Streck

Abstract: The theme of the 6th Symposium of the International Journal of Action Research invited participants to explore the role of Action Research on the edges that societies are facing today around the world.[1] Among these edges, citizenship as a necessary socio-political process to the functioning of democracy is of special relevance, and in a sense connects with all the other edges, from poverty and migration to climate change. The paper is intended to be an initial exploration of how Action / Participatory Research in its different traditions implicitly or explicitly conceives its role in the promotion of citizenship. The argument is that there is an important democratising legacy sometimes lost or forgotten in favor of a more instrumental approach for organisational functioning and productivity. Listening to some selected voices from Europe and Latin America will lead to the proposal of a framework for comparative studies on the theme.

Keywords: Action Research, democracy, global citizenship, comparative studies, learning from differences, systematization of experience

Investigación Acción, Democracia y Ciudadanía (Global):

Construyendo puentes entre tradiciones y prácticas

Resumen: El tema del 6º Simposio de International Journal of Action Research invitó a los participantes a explorar el papel de la Investigación Acción en las aristas que enfrentan las sociedades hoy en todo el mundo. Entre estas aristas, la ciudadanía como proceso socio-político necesario para el funcionamiento de la democracia cobra especial relevancia, y en cierto sentido se conecta con todas las demás aristas, desde la pobreza y la migración hasta el cambio climático. El artículo pretende ser una exploración inicial de cómo la Investigación Acción/Participativa en sus diferentes tradiciones implícita o explícitamente concibe su papel en la promoción de la ciudadanía. El argumento es que existe un importante legado democratizador que a veces se pierde u olvida en favor de un enfoque más instrumental para el funcionamiento y la productividad organizacional. La escucha de algunas voces seleccionadas de Europa y América Latina conducirá a la propuesta de un marco de estudios comparativos sobre el tema.

Palabras clave: Investigación Acción, democracia, ciudadanía global, estudios comparados, aprender de las diferencias, sistematización de experiencias

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1 "Action Research on the Edge" – IJAR 2022 Symposium, October 12–14, 2022, organized and promoted by Arama – Initiative in Action Research, Sabanci University, Istanbul.

As introduction: Is there fire under the ashes?

Action Research, as other research methodologies and science in general, are today challenged to rethink their role. When the proponents of the 6th Symposium of the International Journal of Action Research invited participants to explore the edges of Action Research, they seemed to be suggesting that research may have its share of responsibility for the multifaceted crisis we are facing today and that are well known: hunger in many parts of the world, forced migrations, the installation of authoritarian regimes in many countries, drastic climatic changes and environmental degradation and disasters, to name a few. How does Action Research fit into this picture? Eventually, where can alternatives be anchored?

In these circumstances two simultaneous movements are called for. One of them is to acknowledge the myriad of innovative practices that can be found all over the world. A quick look at the articles published in the *International Journal of Action Research,* and other journals in the field, makes us aware that academics and practitioners are struggling to find ways to make a difference, and in different ways. In the last years I have been happy to see experiments in doctoral dissertations and master theses that constitute healthy methodological transgressions, for instance, mixing Action Research with Autobiography, developing creative strategies of participation in times of Covid-19 pandemic such as writing and sharing "pedagogical letters" for constructing the data corpus to be collectively analysed. These experiments are signs of the unrest which is an essential ingredient for any change.

The other movement is a return to the origins of what has become known as Action or Participatory Research. What where the original promises of Action Research, and to what degree have they been fulfilled? Are they still valid and necessary today? If they have been covered by ashes, are there some embers to be awakened and that can potentialise innovative practices and help to redefine the role of Action Research in today's societies? The search for fire beneath the ashes is evinced through the frequent citations to what can be considered founders or "fathers/mothers" of the movement, such as Kurt Lewin, Eric Trist, Marja Lisa Swantz, Orlando Fals Borda and Paulo Freire, among many others.

There seems to be a general agreement that since its beginning Action Research, in its various formats, is related to the promotion of democracy. I will try to check this argument, and identify aspects that have been highlighted in some discussions in Europe and in Latin America, based on the assumption that different socio-political-cultural contexts will require and produce different approaches to actualise the democratising principle, and that the dialogue among these approaches is an important step towards the understanding of citizenship that, while necessarily linked to nationalities and states, today needs a broader scope given the global dimension of the problems facing humanity and planetary sustainability.

The boundaries of citizenship have shifted significantly in the last decades. Melissa S. William has summarized these boundary shifts in four categories: a) the boundaries of political and cultural identities, meaning that there is a rise in the number of individuals who hold dual citizenship or who have strong bonds of membership in more than one country, such as "diasporic communities"; b) with the trade increase and the rise of multinational corporations, the economic boundaries no longer coincide with the nation state; c) the political-institutional boundaries tend to be expanded through international agreements that generate binding decisions, such as the European Union and other regional initiatives; d) the boundaries of democratic participation are gaining in scope, having increasingly a transnational character,

from indigenous populations to ecological movements. These boundary shifts affect not only our understanding of citizenship, but the way of producing knowledge with these citizens (William, 2006, p. 224).

As conclusion, I will draft an outline of a possible framework for comparative studies in Action Research, more specifically as related to its democratising legacy and potential. Based on comparative methodology, the framework will be made up by three dimensions which, on their turn, can be broken up in units of analysis. The contextual dimension contains units of analysis that correspond to the identification of stakeholders, the socio-cultural environment, and political conditions. In the epistemic dimension we ask about the theoretical and conceptual foundations, the specific role of the researcher and other stakeholders. The third dimension, identified as strategic, asks about the future perspectives, emergent models, and new insights.

The democratic legacy of Action Research

In the literature we find Action Research associated with expressions such as participation, involvement, co-production, co-generation, co-determination, co-creation, and partnership. The differences in terminology point to particularities in socio-cultural contexts, as well as to methodological choices made by researchers. What they have in common is the effort to bridge the gap in traditional research among those who are involved in the process of knowing. Marianne Kristiansen and Joergen Bloch-Poulsen (2021) ask whether we could refer to a participatory turn, considering that participation has become so pervasive, although with sometimes antagonistic meanings. As they put it, "It seems to be more and more widely accepted that citizens, users, customers, employees etc. should not simply be told what to do, what is to happen to them, or what is best for them. They should be involved to a greater extent" (p. 17). This may refer to people having more influence on decisions that affect their lives, but it may also refer to improving efficiency and achieving more durable results. That is also why, in their assessment, Action Research practices tread a fine line between improving efficiency and promoting democratisation and humanisation.

This fine line seems to be at the risk of being blurred in favor of consumerism and productivity, in what is being defined as surveillance capitalism. As pointed out in a recent collective text: "Surveillance capitalism succeeds in expropriating citizens' civil rights as well as their capacities to participate in deliberative democracy and to live their lives according to their individual preferences. Surveillance capitalism thus attacks democracy at its very roots" (Fricke et al, 2022, p. 12). The authors then argue that to reduce Action Research to improving organisational processes or coping with specific social and environmental issues means giving up the democratic ambitions that are part and parcel of Action Research.

These democratic ambitions can be found already in Kurt Lewin. In his seminal text "Action Research and minority problems" he makes explicit that the methodological approach he is proposing is far from neutral, or situated in a sphere above the actual problems people are facing in their lives and communities. We may question his "social engineering" concept as too mechanical, but his recommendation that "it will be necessary to install fact-finding procedures, social eyes and ears, right into social bodies" has become a basic principle in the

various traditions or tendencies of Action Research (Lewin, 1946, p. 38). These social ears and eyes are to be installed in social bodies to produce changes by the people themselves based on values of social justice. Science, he points out, gives more "freedom and power to both to the doctor and the murderer, for democracy and fascism" (p. 44). Already in his time he recognised that the so-called minority problems are indeed the majority problems. Today we might prefer to say that that they are the problems of humanity.

But there are two other features in Lewin's article that I want to highlight for the arguments in this text. First, there is the recognition that Action Research should be carried out by a "symphony" of disciplines given the complexity of social problems. Interestingly, economics should be integrated with psychology, sociology anthropology and other social sciences. He foresees a promising future for the integration of disciplines, whether through the amalgamation in one social science or a just a co-operation, both of which are still far to be accomplished. Institutionalisation of inter and transdisciplinarity is still a major concern when it comes to facing today's major social and environmental problems (Klein, Baptista & Streck, 2022).

The second point I want to highlight from Lewin's text is the geopolitical scope of social problems, a fact that is also becoming more evident with growing global interconnectedness. Lewin's insight may have become a kind of common sense, but we are still far from finding a solution. Let us listen to him: "The last point I would like to mention concerns the relation between the local, the national, and the international scenes. No one working in the field of intergroup relations can be blind to the fact that we live today in one world" (Lewin, 1946, p. 45). He then goes on saying that intergroup relations in the United States will be affected by events in the international scene, and particularly by the fate of "colonial peoples". Foreseeing the strength of the emergent power he asks if the United States would be willing to give up the usual policy of exploitation "which made colonial imperialism the most hated institution the world over" (p. 46). It can be mentioned only in passing that Lewin's admonition points to what today is being discussed in (de)colonial studies, where coloniality of knowledge is imbedded in power structures that keep reproducing social inequalities, racial discrimination and not least the exploitation of nature (Moraña, Dussel & Jáuregui, 2008).

The democratic and democratising legacy of Action Research can serve as an ethical reserve to deal with the present historic situation (Gunnarsson et al, 2016, p. 6). There is obviously no single or easy answer even to what we understand by democracy, but most of us would agree that democracy goes beyond electing representatives from time to time. It involves the enabling of people for responsible participation in designing and defining their lives as well as the life, present and future, on and of the planet. This implies recognising the political dimension of Action Research, and its capacity to create new kinds of knowledge due to the democratic participatory way of producing this knowledge. Ahedo (2022) argues that Action Research must "recover the political sense of community action" (p. 31) starting from the bottom up, rebuilding the self by "incarnating and politicising pain". Only so could the individual Cinderellas break the condemnation to perpetually scrubbing the floor and, united, change the story.

Two European voices

Among the many authors that have dealt with the connection of Action Research and democracy I will mention two from the European context before going to the Latin American

experience. In the Scandinavian tradition of Action Research, Bjoern Gustavsen[2] stands out as a key figure associated with research with the work context. In the article "Action research and the promotion of democracy" Gustavsen traces the roots of the approach developed in Scandinavia to the socio-technical system theory developed by the Tavistock Institute in the United Kingdom (Emery, 1959). Based on the notion that communication is central for changing social and power relation within organisations, "democratic dialogue" would be the way for producing changes. Gustavsen (1992, p. 3–4) identifies 13 principles that would permeate the work / dialogue conferences:

1. The dialogue is a process of exchange: ideas and arguments move to and fro between the participants.
2. It must be possible for all concerned to participate.
3. This possibility for participation is, however, not enough. Everybody should also be active. Consequently each participant has an obligation not only to put forward his or her own ideas, but also to help others to contribute their ideas.
4. All participants are equal.
5. Work experience is the basis for participation. This is the only type of experience which, by definition, all participants have.
6. At least some of the experience which each participant has when entering the dialogue must be considered legitimate.
7. It must be possible for everybody to develop an understanding of the issues at stake.
8. All arguments which pertain to the issues under discussion are legitimate. No argument should be rejected on the ground that it emerges from an illegitimate source.
9. The points, arguments etc. which are to enter the dialogue must be made by a participating actor. Nobody can participate "on paper" alone.
10. Each participant must accept that other participants can have better arguments.
11. The work role, authority etc. of all the participants can be made subject to discussion: no participant is exempt in this respect.
12. The participants should be able to tolerate an increasing degree of difference of opinion.
13. The dialogue must continually produce agreements which can provide platforms for practical action.

I chose to reproduce these principles because dialogue has become a basic concept in the Scandinavian practice of Action Research, and has since had interesting and important conceptual elaborations. One example is the work of Marianne Kristianssen and Joergen Bloch Poulsen in the book *Midwifery and Dialogue in Organizations* (2005). Dialogue is identified as a process of sharing, daring and caring. Midwifery conversations, as an expression of dialogue, happen within maieutic space and rhythm, that include features such as co-humour, mutual readiness, verbal co-production, space for reflection and a reflection rhythm.

     Gustavsen's concern with democracy, however, goes beyond work place relations. His vision was to see single cases connecting in a social movement, crossing boundaries. In his words:

This opens up co-operation between researchers needed to transcend single projects, and enter upon the development of a broader social movement. With the link to a specific context characterisng all practical action. No researcher can, on his or her own, make a broad impact. This can be achieved only by working together.

2   For a comprehensive summary of Gustaven's life and work see the obituary written by Richard Ennals (Ennals, 2018).

This has important implications for our understanding of the role of Action Research for the promotion of citizenship in an international, global perspective. Today national and international research groups and networks are trying to address the challenge Gustavsen was mentioning, but they still fall short of becoming a social movement able to shake traditional hegemonic ways of producing knowledge about or for people, not with them.

The second European author that I chose to mention is Werner Fricke for his leadership role in the German programme of humanisation in the work place (Fricke, 2012). Although the programme lasted only for a short period (1974–1981), Fricke recognises its great potential for liberating social power for democratic transformation. Reflecting on the process, Fricke realises how participation soon became instrumentalised by managers, only confirming the initial distrust manifested by the workers when invited to join the process. That is why the researchers draw a line between instrumentalised participation and democratic participation. Regarding democratic participation, the author concludes that participation cannot be taken for granted, and then identifies some characteristics and premises[3] for democratic participation to happen:

1. The stakeholders must free themselves from their frustrated experiences with participation, and develop trust in their innovative qualifications.
2. There must be created time for collective reflection and education.
3. It is decisive that employees integrate their work experience, perspectives and interests in the process.
4. It is about finding a new and fair form of co-operation with experts and the directive body.
5. It must be assured that education/continuing education are central for the enactment of innovative qualifications.
6. Education with the aim of enabling for democratic participation is not confined to professional capacitation, and much less the adaptation to the demands of the market.
7. The argument of deficient qualification as a subjective barrier in face of the demands of the work place are both true and false. They are true because most workers have only limited access to the learning opportunities and contents, and they are false because the workers are able to formulate their learning needs and because it is possible to organise opportunities to meet these requirements.
8. Educational demands are many times very elemental, as the capacity of linguistic understanding which is due to the silencing produced through the lack of communication in many work situations.

There are some important lessons to be learned from the European voices. First, that in spite of sharing the same history, in the case the inheritance from Tavitock Institute, experiences cannot be transplanted. Organisational culture and socio-political conditions require adaptations and reinventions, as much in research practice as in theoretical assumptions. Another feature of both experiences is the importance of the workplace for developing democratic practices. The question, as pointed out in the introduction, is whether the new faces of capitalism in organisations leave room for the exercise of democratic dialogue (Gustavsen) and democratic participation (Fricke) as essential features of Action Research. Seen from another perspective, we may ask if there are new spaces for dialogue and participation to be explored by Action Researchers and/or eventually new ones to be created.

3   The items are a free and abbreviated translation of the section "Bildung-Reflexion-Remokratische Beteiligung" in the chapter "Demokratisierung der Arbeit ist Sache der abhängig Beschäftigten selbst" (Fricke, 2008).

Looking at the Norwegian workplace research tradition, Hans Cristian Garmann Johnsen, Ida Lervik Midtboe and Richard Ennals (2018, p. 206) share a rather optimistic view: "We have observed that although companies have adopted the new business system, they still retain strong elements of dialogue tradition. In fact, we observe that companies balance different organizational design principles." This may also be true for other contexts where different Action Research traditions as a democratising practice have been developed.

Two Latin American voices

Almost at the same time that in Europe Action Research was involved with the promotion of democracy and humanisation in the working world, similar methodological procedures were used and developed with similar aims in different geographic, cultural and political contexts, respectively, also with different strategies and perspectives. In this section we will have a brief look at Orlando Fals Borda and Paulo Freire, and their understanding of the political dimension of Action Research, or as more commonly used in Latin America, of Participatory (Action) Research. This exercise will allow us to move towards the proposal of a framework for more detailed and comprehensive comparative analysis. We may be surprised, at a first look, that they seem to be quite independent developments from what was happening in Europe, since one will not find the usual references to Kurt Levin or to Tavistock, as in Scandinavia and in Germany. Notwithstanding, there are obviously hidden connections that will require a more detailed analysis, which is beyond the scope of what is being proposed in this paper.

The Colombian sociologist Orlando Fals Borda has become known for developing what he came to label as *Investigación Acción Participativa* (IAP) which can be considered part of the broader liberation movement that characterised progressive intellectual work in Latin America in the second half of the last century. It was a movement that brought together actors from a variety of fields, from economics with the theory of dependency, to theologians with the theology of liberation, to arts with the theater of oppressed. Fals Borda's research work had as horizon developing what he called a popular science, i.e., a science embedded in the struggle for social justice. His ethics of the "universal Macondian" (Fals Borda, 2009, p. 373) would combat the arrogant monopoly of Cartesian science, and produce a different science from the last corners of the world, exemplified by the forgotten Macondo in the novel *Cien años de soledad* by Gabriel García Marques. Popular masses would be protagonists in producing the knowledge they need for their well-being and for promoting the necessary social transformations. Subversion, in this context, acquired a positive connotation as a historical possibility to create new bases for a new society.

In the commitment with transformation, an important aspect to be considered according to Fals Borda, is the identification of key groups to be served by science, and to be constituted as reference groups for scientific research. That is why his main stakeholders were campesinos, Indians and workers. In the article "La ciencia y el pueblo: nuevas reflexiones sobre la investigación-acción"[4] (Fals Borda, 2010, p. 185–191) he identifies six methodological learnings which I summarise in what follows:

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4   Translation: "Science and people: new reflections on Action Research".

1. Authenticity and commitment: Commitment has to go hand in hand with authenticity. He criticises intellectual activists who produce knowledge in the name of the people. At stake here is what can be considered legitimate knowledge from the point of view of the community.
2. Anti-dogmatism: Fals Borda refers, on one hand, to ideological dogmatism that sometimes guides researchers in their work with popular groups or movements, and which does not allow a real openness to reality. Dogmatism refers also to particular techniques or specialisations which hinder creativity and originality. Dogmatism, he reminds us, is not only anti-scientific; it is also an obstacle in the struggle for liberation.
3. Systematic "devolution": Fals Borda acknowledges that in the *campesino culture*, as in any culture, there are positive and negative aspects. The role of the researcher is to introduce questions, and integrate this knowledge in broader historical frame, thus leading to new levels of political consciousness. There are four rules for this to happen: a) communication that respects the community's level of understanding; b) simplicity of communication; c) self-investigation and control (by the community); d) technical "vulgarisation" (making research techniques available to the people).
4. Feedback to the organic intellectuals: There is not only the joint production of knowledge for the community. The researchers also need to be willing to be educated in the process. It is thus necessary to define specific roles for the researcher and the other participants.
5. Action-reflection rhythm: It is the researcher's responsibility to connect local to general knowledge, the region to the nation and world, social reality to the mode of production, observation to theory, practical application and principles. For this articulation to be effective, there should be developed a rhythm of work that goes from action to reflection, and from reflection to a new level of action.
6. A modest science and dialogical techniques: This principle is based on two ideas: a) that science can advance in very modest and primitive situations, and that there should be favoured local, economic and practical instruments, which does not mean that it is a minor science; b) that the researcher has to give up his/her academic arrogance, and try to establish symmetric relations, and integrate people as active and thinking-feeling subjects in their own research.

Another frequent reference in Action and Participatory Research in Latin America and elsewhere is Paulo Freire, although he would probably not consider himself an Action Researcher in the strict sense of the term. The closest to an explicit reference to Action Research is a speech at the University of Dar-el-Salaam, Tanzania, in 1971, with the title "Creating alternative methods to do research: learning to do better research through action" (my translation from the Portuguese: *Criando métodos de pesquisa alternativa: aprendendo a fazê-la melhor através da ação*) (Freire, 2006, pp. 34–41). Freire starts by arguing that reality is more than facts; it is facts and the perception people have about facts. That is why it is impossible to know reality without people's participation. Knowledge is intersubjectively produced by researchers and other stakeholders, both mediated by the world they want to know and change.

The methodology he suggests for organising an adult education programme in Tanzania is similar to the methodology he reports in *Pedagogy of the oppressed* for identifying the *generative themes* and *generative words* for the literacy program in Brazil, where he reaffirms that "the investigation of the thinking of people cannot be done without the people, but with

them, as subjects of their thinking" (Freire, 1981, p. 119). It is a process that evolves in a spiral: the more we investigate people's relation to their reality, the more we educate ourselves, and the more we want to know about our reality through a continuous process of codification and de-codification of this reality.

As for many action and participatory researchers mentioned earlier, dialogue is a key element for participation in the struggle for liberation. Dialogue, for him, is an act of creation through which people pronounce their world. This reading and pronouncing the world in a liberating or emancipatory perspective has two dimensions: naming/ denouncing the oppressive situation and naming/announcing the "untested feasibilities" (*inéditos viáveis* in Portuguese). In short, in Paulo Freire's understanding, Action or Participatory Research is an act of jointly pronouncing the world, assuming that authentic pronouncing is praxis as a continuous interplay of action and reflection.

For dialogue to happen, there are some conditions which he identifies in *Pedagogy of the oppressed:* a deep love for people and the world; humility to recognise one's limits; faith in people's capacity; trust in people; hope that change is possible; a critical and open thinking (Freire, 1981, pp. 94–96). In the last chapter of the book, Freire identifies two matrixes of cultural action that apply for the process of knowing, both for teaching and research: the anti-dialogical one, where we have conquest, dividing to dominate; manipulation and cultural invasion; on the other hand, in the dialogical cultural action we have collaboration, union, organisation and cultural synthesis.

The Latin American voices highlight the transformative potential of the "margins" of society. Action or Participatory Research participates in the struggle of emancipation and social justice. Participation regards as much the involvement of stakeholders as the collective involvement for social changes. The movement of systematisation of experiences, today widely practiced with social movements and popular organizations, is a sign of the vitality of participatory methodologies in Latin America. Oscar Jara (2012, 88–99) identifies eight key characteristics of systematisation of experience, which I summarise briefly: 1) It produces knowledge from the experience, but intends to transcend the experience; 2) makes a historical "reconstruction" of the experience to better understand what has happened; 3) values the knowledges of people that are subjects of the experience; 4) contributes to identify tensions between the project and the process; 5) identifies and formulates lessons learned in the process; 6) promotes the documentation of the process and elaboration of subsidies for other organisations; 7) strengthens individual and group capacities; 8) the subjects of the experience are the key protagonists of the process, which does not exclude the support of external consultancy.

The increasing acceptance of systematization of experience in academic research is a sign that the democratic legacy of Action Research in Latin America is attempting to broaden the scope of stakeholders respecting their own ways of knowing and *pronouncing* their world. There is a growing awareness that the colonial inheritance, as well as the movements of resistance and change, have many faces. Action Research can visibilise these faces, allow these voices to heard and to potencialize their emancipatory practices.

A framework for comparative studies – as conclusion

The reflection produced in this paper calls for a proposal of possible extensions and in-depth analysis. Action Research, as we know, is an umbrella concept that comprehends a vast scope of understandings and practices, as can be seen, for instance, in the *Sage Handbook of Action Research.* I agree with the editor, Hilary Bradbury, that the metaphor of the family is quite appropriate to refer to the community of Action Researchers (Bradbury, 2015, p. 4). In the family there is not always agreement among the relatives, some of them are closer and others more distance, but usually there is a true desire to meet for knowing each other as well as to tell stories about the fathers and mothers.
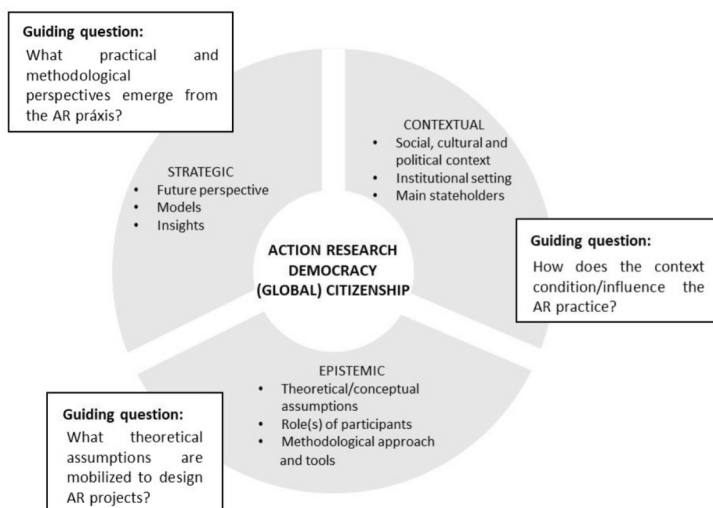
When Gustavsen (2017) was advocating for an Action Research social movement to make an impact on society, he brought comparative studies as a tool for connecting different schools and practices. The case, he argues, is not to bring each individual case into a general theory, but to bring to light the characteristics of each case, identifying the differences and the similarities. There could then be organised clusters, which on their turn could please exclude be compared among themselves. "The richer a specific context is in terms of different phenomena, the more likely it is that new combinations will be discovered" (p. 108). Again, the larger background should be democracy, meaning the space for dialogue.

The question, then, is how to arrive at specificities while at the same time not losing sight of the larger context. Two recommendations from comparative methodology will suffice at this moment to move towards a proposal of a framework for comparing Action Research practices. The first one comes from Jürgen Schriewer, who starts making a distinction between comparison as a general *mental operation* that is of common use in everyday life, and comparison as a *scientific method.* One key distinction between them is that, as a scientific method, comparison cannot be restricted to compare isolated facts or phenomena, but is based on multi-level analysis techniques looking at presumed relations between variables, phenomena or systemic levels. In summary, according to him, "as a social science method, comparison does not consist in relating observable facts, but in relating relations or even patterns of relations among themselves" (Schriewer, 2018, p. 137: *my translation*).

The second recommendation refers to the way of approaching realities to be compared. Based on literature (Morlino, 2018; Phillips & Schweisfurth, 2014) and on previous experience (Streck, 2020; Baptista, Klein & Streck, 2022) a useful procedure is to identify dimensions and within these dimensions identify particular units of analysis or categories. This approach, while acknowledging the interconnection among dimensions and units of analysis, allows us to establish relations among relations or among pattern of relations, and thus mutual learning and co-operation. For each dimension and unit of analysis can also be developed questions for guiding the exploration.

For the purpose of this paper, I am proposing three dimensions. The first one concerns context, and can be broken down in the following units, among others according to specific issues to be addressed: social, cultural and political context, the institutional or organisational context and main stakeholders. A second dimension, epistemic, asks about the conceptual foundations or assumptions, the role assigned to participants in the process, and the methodological approach and tools. The third dimension, strategic, deals with present and future perspectives for transformation, and models and insights emerging from the analysis. The

figure below is an attempt to capture graphically the proposed dynamics for comparative studies on the theme.

Guiding question:
What practical and methodological perspectives emerge from the AR práxis?

STRATEGIC
- Future perspective
- Models
- Insights

CONTEXTUAL
- Social, cultural and political context
- Institutional setting
- Main stakeholders

ACTION RESEARCH DEMOCRACY (GLOBAL) CITIZENSHIP

Guiding question:
How does the context condition/influence the AR practice?

EPISTEMIC
- Theoretical/conceptual assumptions
- Role(s) of participants
- Methodological approach and tools

Guiding question:
What theoretical assumptions are mobilized to design AR projects?

To exemplify the use of the framework we could take the key stakeholders in particular contexts. Looking at Scandinavian research experiences it is quite easy to perceive that organisations, from public health institutions to industries, are the context from where most of the stakeholders come. Change is to be brought about through democratic participation in the work place that supposedly can extend to the wider social and political milieu. In the case of Latin America, the main stakeholders come from the margins of society, such as *campesinos*, landless peasants and poor communities in urban peripheries. The partnership between worker unions, enterprises and government can hardly be imagined in most Latin American political, cultural and social contexts.

The arguments and authors brought in for the discussion should suffice to reinforce the need to revisit the tradition of Action Research to deal with social problems in the perspective of promoting democracy. It has also been argued, on the basis of the voices brought into the discussion, that citizenship for democracy today should extend beyond the limits of particular organisations, regions or nation-states. What is needed today is that research provides insights and instruments for identifying the interconnectedness of realities. Comparative studies can aid the Action Research community to learn from differences, and join forces to face the complex problems we are facing as societies, as humanity and as inhabitants sharing the same planet.

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Dissensus as part of dialogue in organizational change processes: a case study in an NGO

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Abstract: In this article we discuss, from the experience of action research on organizational change in an NGO, how interpreting the concept of dialogue in organizational theory has impacted the way in which it has been understood and applied in the processes of change that organizations experience. The ontological relationship that has been established between dialogue and organizational change and the interpretative frameworks used, although they have represented a great epistemological and practical breakthrough, have also limited the potential of the concept of dialogue itself by oversimplifying it. The reflective analysis allowed by action research on the case leads us to propose dissensus as an alternative: recognizing dissensus as natural in the organizational context and as an engine of real change. Understanding dialogue only as a search for consensus leads people to hide differences and not properly manage them in the process of change, because talking about organization is talking about relational and communicative patterns that highlight the influence of power, internal asymmetry and diversity in the processes of change. This complexity demands a new look on know how to read it and understand it properly without oversimplifying it.

Keywords: action research, dialogue, dissensus approach, consensus approach, organizational change

El disenso como parte del diálogo en procesos de cambio organizacional: un estudio de caso en una ONG

Resumen: En este artículo discutimos, a partir de una experiencia de investigación acción sobre cambio organizacional en una ONG, cómo la interpretación del concepto de diálogo que ha hecho la teoría organizacional ha impactado en la forma de entender y aplicar este concepto en procesos de cambio de las organizaciones. La relación ontológica que se ha establecido entre diálogo y cambio organizacional y los marcos interpretativos utilizados, si bien han representado un gran avance epistemológico y práctico, también han limitado el potencial del propio concepto de diálogo al simplificarlo en exceso. El análisis reflexivo que permite la investigación-acción sobre el caso nos lleva a proponer el disenso como alternativa: reconocer el disenso como natural en el contexto organizacional y como motor de cambio real. Entender el diálogo solo como una búsqueda de consenso lleva a las personas a ocultar las diferencias y a no gestionarlas adecuadamente en el proceso de cambio, porque hablar de organización es hablar de patrones relacionales y comunicativos que evidencian la influencia del poder, la asimetría interna y la diversidad en los procesos de cambio. Esta complejidad exige una nueva mirada para saber leer el diálogo y comprenderlo correctamente sin simplificarlo demasiado.

Palabras clave: investigación acción, diálogo, Enfoque del disenso, Enfoque del consenso, cambio organizacional

1.   Introduction

Dialogue is one of the central concepts in action research as has been addressed by prominent authors such as Gustavsen (2007) or Freire (2012). It has also been a concept on which much has been written from very diverse perspectives to try to better understand what occurs *in* and *through* it. But what can happen when we focus too close on a single object? We run the risk of leaving everything else in the shadows. Perhaps with dialogue something similar has happened: so much light on it has obscured the remaining space. In this article we try to shed light on those dark spaces, on what has happened around dialogue while it was at the center of analysis. We consider this to be a particularly relevant debate for action research on organizational change processes.

The focus of our contribution to action research is therefore in the organizational field. Dialogue in organizational theory has been reduced to a communicative event focused on speech and idealizing the results it generates. An example of this vision is found in Ellinor and Gerard (1998) when they affirm that dialogue is a powerful practice of communication that transforms those who practice it. Knowing what meaning is given to dialogue in current organizational theory and how that dialogue has been carried out in the organizational contexts of change, allows us to better understand why dialogue has become such a commonly used word that it has been attributed a behavior oriented towards the search for mutual understanding, the achievement of consensus and the avoidance of dissensus.

This way of understanding dialogue has limited its potential in processes of transformation. In recent years, and influenced by Bakhtin (1985, 1993; 1986, 1994), we find proposals that question these approaches aimed at simplifying the complexity that limit the processes of change and their innovative potential. These proposals rescue the value of dissensus as an approach to understanding dialogue and are proposed as experiences of organizational innovation (Kristiansen and Bloch-Poulsen, 2010). Reflections on dialogue and consensus are also found in the literature on action research (Karlsen and Larrea, 2015). The objective of this article is to propose a strengthening of the value of dissensus in dialogue in association to action research in organizations.

And from this perspective, the article analyzes the experience of the research team in a process of organizational change in an NGO within the framework of action research. Through action research we discuss the dissensus approach as a way to interpret the role of dialogue in processes of organizational change through an organization in a process of change with failed results. It failed due to the inability of the participants to overcome the monological vision of how dialogue should be deployed, denying and rejecting the tensions inherent in communicative processes in general and processes of organizational change in particular.

After this first failed phase, the results of the experience, together with the experience of the research team and the information collected while accompanying the group, show a different and distant reality with respect to the prevailing theory. The tension between the observed, the experienced and what "should be", generated a series of questions: To what extent has the *mainstream* concept of dialogue limited the process of organizational change? What was generating the emphasis on consensus when understanding dialogue? What is the transformative potential of the dissensus approach?

These questions, the result of the tension between what arises through the experience of change and what theory indicates, opened the possibility of exploring the theorization of the

concept of dialogue to be applied in processes of organizational change, and are what guide the objectives of this reflective exercise on the experience, which are a) revealing dissensus as an intrinsic element of dialogue; b) showing the effects of integrating dissensus into processes of organizational change; and these questions are what c) opening new lines of research through action research.

For this purpose, in this article we will address the theoretical reflection on dialogue in organizational theory and the need to overcome monological theoretical frameworks that limit dialogue's potential. We will also reflect on organizational change and dialogue in their circular relationship, integrating the approaches of dialogue in the processes of change, to deploy a dissensus approach; an approach that, as we will see, allows us to rescue the dialogical essence of dialogue. We will approach the narrative through action research on the organizational change process carried out in the NGO, analyzing the results of said process and ending with the conclusions generated in the experience.

2.   Theoretical framework: the concept of dialogue in organizational theory and monological theoretical frameworks

The action research process presented in this article took place in a context in which, though not explicitly consciously, it was assumed that divergence or difference is something negative. This section frames this way of thinking as a natural result of the theorizing generated about organizations.

Organizational theory has been analyzing organizations for decades, but what interests us in this article is to analyze how dialogue is conceived and has evolved from the different approaches of organizational theory, so that through the experience of an action research process, we can better develop the construct of dialogue from the framework of dissensus.

Sisto (2004), in his in-depth analysis of organizational theories, identifies contemporary, modern and more widely disseminated organizational theory as Functionalist Organizational Cognitive Theory. In it the organization is a unified whole, organized, homogeneous, coherent, with clear and predetermined rules that guide people to specific goals.

For Functionalist Organizational Cognitive Theory, even in its most evolved stages in which social psychology and humanism had already permeated its analysis, the mechanisms that were used in the organization served for people to integrate into it, be motivated and correctly develop their functions. This vision involves a simplification of organizational life and, as Sisto states, even decision making was generated through a simplification of the process which, in turn, generated a simplification of reality (Sisto, 2004, p. 60).

Over time, organizational theory evolved into new ways of understanding the organization and the subjects in it, which in organizational practice meant the incorporation of group dynamics as a way to improve the management of the organization itself. In this context, Schein (1993) proposes dialogue as a *technology* for improving the formulation of problems and their resolution. This proposal for dialogue holds a promise: to help groups achieve a higher level of awareness and thus greater creativity and effectiveness in their decision-making processes. We see here how the instrumental value of dialogue is reinforced when understood as a technology, instrument or tool at the service of the organization's efficiency.

This way of understanding dialogue assumes that diversity in human beings is considered a problem since it prevents people from understanding each other. "Why do we have so much trouble understanding each other?" (Schein, 1993, p. 41). This question drives his analysis. Dialogue is the place for problem-solving, becoming a vehicle for understanding (Schein, 1993, p. 40). Consequently, dialogue is the instrument that allows us to reach equality for everybody and advance the organization *as a whole.* Dialogue from this perspective fits with the existing vision of the organization as an orderly, coherent, goal-oriented, linear, causal and complexity-reducing structure, which aims to solve problems and increase efficiency. In this model, "difference" is diagnosed as a disease (Sisto, 2004, p. 85) and dialogue is its cure.

The following sections present the action research process that allowed these assumptions to be questioned. First, we describe the methodology used, followed by the narratives and the different phases of the process.

3.   Methodology: Action research in an organizational change process

As already noted above, the action research process was performed in an NGO that called on the research team to accompany an organizational change. The number of members of this NGO went from twenty-two to sixty-three in a short period. However, the number of those responsible did not increase proportionally. So those who were already doing coordination work continued to do so, but with a greater number of people in charge. This made day-to-day management, communication and coordination more complicated, leading the management to rethink its leadership style.

In response, a process based on the action research methodology was proposed, accompanying the traction groups that will lead the change: managers and coordinators.

The accompaniment process began on October 20, 2017 and ended on May 27, 2019. During this time, 13 training and reflection sessions were held. The members of both groups consisted of executive, economic and financial managers, regional managers, socio-occupational managers, legal, advocacy and participation managers, as well as orientation and psychological care managers.

The sessions included:

- Questionnaire: at the beginning of the sessions.
- Field diary: with observation notes of what they discuss, and with the reflections of the research team before, during and after the session.
- Training session: in which the theoretical contents on leadership and dialogue are worked on.
- Reflection session: analysis of what is happening in the sessions, in the group and its impact on the change process.
- Reinforcement workshops: at the request of the group for issues that need more in-depth treatment.

The approach in which the research team was formed drew from the initial action research sources of its pioneer Kurt Lewin, and determined how people were accompanied. Specifically, the key points that defined this method were:

- The demands raised were worked from an accompaniment "with," not "for."
- An initial situation was modified to accommodate a better situation.
- The change does not come from the implementation of a concrete result but from an accompaniment in a process in which there is a more active and prolonged role over time.
- Dialogue is the cornerstone in this way of promoting change.

Each session was previously organized with work proposals that were shared and progressed. Notes were taken from each session based on the observation made by the research team. The different types of notes show the variety of information collected:

- Pre-notes: prior to the session, noting what should be worked on as a scaffold to distribute work time well.
- Observational notes: information about what was observed as reactions, interaction structures, relationship dynamics in the group.
- Content notes: literal notes of what was verbalized both in the dynamics that were carried out and in the conversations that were generated.
- Result notes: impressions of the session at the time of closure.
- Post-notes: contributions considered useful for the change process.

Throughout this process, the activities of the research team within the group consisted of:

- Propose the objective to be achieved, agree on it and work during the sessions on this objective;
- Provide the necessary resources to ensure that what has been agreed is achieved;
- Record what the interaction and dialogues in the group were like; and,
- Report to the group any information about how the sessions progress and how they could incorporate it into the change process.

4.   The case study: organizational transformation of an NGO

4.1. Narratives resulting from action research in a failed organizational change process

As we said in the previous point, everything began with a request from the leadership of an NGO to the research team for accompaniment in a change process; we begin to work with the elements that the management itself has indicated: turning towards an innovative humanist, feminist leadership, more participative and distributed, changing the focus from a single leader towards team leadership.

The people in the traction group that would lead the change worked in centers from different places, occupied different positions and hierarchically did not have the same responsibility within the organization chart, but all shared one characteristic: they managed teams. Some had just taken up responsibility recently, others had been in positions of responsibility for some time.

For the training sessions, there were two key elements: the innovative humanist leadership model and dialogue as a catalyst for change. The research team used the CANVAS of the

Innovative Humanist leadership model, designed and developed by Amalio Rey and Ignacio García.[1]

This process of collaborative reflection and contrast, action research as a framework and dialogue as a tool, allowed us to have a common methodology that advances through listening, to ourselves and others, and participation.

The dialogue unfolded on two dimensions: as a **method and as an object** for change; the people responsible would acquire competences in dialogue that would allow them to deploy their leadership and, at the same time, the interactions that occurred in the meetings were being analyzed from the observation of the research team and in contrast with the group.

The proposed dialogue was drawn from a variety of sources. On the one hand, seeking its application, a practical perspective was used and oriented to understand dialogue as a tool (Bohm, 1997; Isaacs, 1999; Scharmer, 2015). On the other, the philosophical perspective of Moratalla's dialogue (2006) was also used. In this way, dialogue as an instrument of change was joined by a philosophical aspect related to dialogue as an attitude (dialogical) that complemented the first.

However, finally, what happened during the process completely distanced itself from the expectations; everything that happened turned this perfectly idealized and ideal approach around.

4.2.   A newly created team and many expectations in the process

As the process progresses, what emerged begins to drift away from what could be expected from that ideal of dialogue that had been outlined at the beginning. Something starts to throw the group off balance.

The meetings were held once a month, and the reflection sessions lasted one morning. They were intense sessions in which the dialogues were particularly relevant and from the first moment the desire was evident that the process entailed a result in the form of a tool, roadmap, solution, means for decision-making, which allowed them to advance in their performance. But where was the change? The question is, "What do you expect to take away from this process?" people answered:

- Tools to be able to lead better.
- A paper that displays the work that each person does in leadership to be able to measure well what additional things to do, without exploding along the way.
- Tools for us, for my team, to improve well-being and effectiveness.
- Being able to agree on how far leadership goes, on what to make decisions.
- To reach agreements and respect them on how we are going to do things and what we are going to do, and their limits. (Content Notes, Personal Communication, October 20, 2017)

That instrumentalized vision of the organization also dragged everything that was generated in it. Session after session dialogue was fraught with tensions that seemed to keep the group moving forward, or at least that was the feeling. This led the research team to a deeper reflection on dialogue in organizational change processes.

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1   For more information visit www.amaliorey.com.

4.3.   The reality shown is neither good nor bad; it simply is

As the process progressed, what was happening in the group was not unfolding according to the projected "ideal" vision. This is when the need arose to compare with other theories on dialogue and organizational change, whether what was happening in this group was something that could be explained epistemologically from other paradigms or was there something in the way the process was being carried out that was not adequate.

What was going on? It seemed that confusion and frustration abounded, both in those who participated and in the research team itself, which hindered the course of the sessions. These feelings appeared very early, already in the second session the group expressed the need for guidelines to follow so as not to "get tangled up," as they themselves verbalize, describing how they want the sessions to be and in the agreements that they consider basic for proper functioning:

"Take care of people. Respect the diversity of "subjectivities." Respect what we agree. We want this to be "operational." Specify. The upcoming sessions must be organized, structuring them and clearly focused on the task. Provide tools to move forward" (Previous Notes, personal communication, October 27, 2017).

Also identified in this second session were messages from the research team to the group along the same lines:

"we are not going to fix everything now, we are not going to have all the tools already to be able to apply them, but what is given to you, what is provided to you, apply it, be aware of applying it and how, and analyze what happens next, and share it" (Previous Notes, personal communication, October 27, 2017).

This situation that is identified as an "entanglement" can be understood by seeing the diversity of expectations and needs that they wanted to cover through the process. Faced with the question of 'what do you want to take away from this session?' an answer was a "consensual model" (Content Notes, personal communication, October 27, 2017), but that "model" could not constitute a miracle and that "consensus" was far being reached. Moreover, perhaps it was not necessary or advisable as an aim, seeing that its dynamics veered towards divergent communicative and relational patterns on which strong emotions were activated and from which it was difficult to go out and move forward.

Intuiting that the dilemmas that could arise included interesting dimensions to work with and with which to advance through dialogue, the group was asked to identify those aspects of the leadership model that they consider to pose greater difficulties, without achieving it, the strength of the internal dynamics of the group ended up prevailing, failing to advance the proposed objective.

What was observed most intensely was the dilemma between consensus and dissensus, a dilemma that essentially compromised the way dialogue was understood and put into practice. To try to more clearly identify the scope of this dilemma and also make the group aware of its nature, they were asked to name, in one word, what that dynamic of "entanglement" is for them, more specifically, what word they would use to describe how they perceive themselves in that "entanglement": "Irresponsibility, Distrust, Pluralism, Perplexity, Perseverance, Diversity, Frustration, Diversity of consensus, Reflection" (Content Note, personal communication, October 27, 2017).

These words show how each person lived and felt that dilemma in different ways, for some it was a source of frustration while for others it simply represented the diverse nature that characterized them. But even the research team's experience was compromised as we see in

one of the result notes: "the session is gone" (Result note, personal communication, October 27, 2017). It seems that the perception of the research team itself was also not being positive, or in any case, the way of interpreting what happened in the session.

In this way, it seemed that, in this group, the diverse, the different and divergent perspectives collided and without knowing what to do with it, or how to work with it. This reality did not seem to favor process's progress, but paradoxically it did not seem to prevent it either; it simply took the group and the research team themselves to a place where progress was not visible, not at least in the way they hoped to see it.

4.4.   Dialogue in practice, is it a practice of non-dialogue or perhaps more dialogue than ever?

The notes that were collected throughout the sessions reflected how the dialogues were developing in the group, as has been collected in previous sections, the people commented that the dialogues seemed to occur in the form of a loop and that the contents were excessively dispersed, it seemed that the dialogue did not lead the group to the place where they believed they should be.

To respond to this concern, team members were provided with more content on guidelines for developing dialogue and dialogic attitudes in teams, such as the Democratic Dialogue chapter of the book *Territorial Development and Action Research: Innovation through Dialogue* by James Karlsen and Miren Larrea (2015), and a supporting presentation where some keys of "The Art of Difficult Conversations" were collected (Sacanell, 2016), all in order to have more tools to manage those difficult conversations.

Dialogue was ceasing to be a magic word and the practice of dialogue was proving much more difficult than its ideal and idealized theoretical developments. Dialogue was being perceived as a space for participatory conversation that was too open, unproductive and a threat to the process, running the risk of becoming a space for majority voices that concealed plurality. The challenge this posed generated questions like: "How can we make common decisions, taking into account the diversity of each process?" (Content note, personal communication, March 23, 2018).

At that time, the key for the group itself and the research team was to increase awareness of how their dialogues were held and how far they were from the idealized conception of the dialogue from which they started. A reflection was necessary that allowed them to see the need to act differently in their interactions and in their communications. The group showed a dialogue that did not fit into the premises established in the scientific literature on how dialogue should be in organizational theory. This feeling was explicitly verbalized: "I really think there is no dialogue in what we do. That's the feeling I get. I notice physical and verbal tension." (Content note, person communication, January 11, 2019).

It seemed then that the ideal dialogue could not coexist with tension. The difficulty in managing diversity continued to generate unrest. When asked what they should do to manage diversity, the answers were: "Accept diversity", "Open one's mind to what can be contributed," "Lower the level of demand (homogeneity)," "Ask us and ask them, what each of the people on the team contributes," "Challenge: be attentive to respect for diversity," "Empower other skills from others (collective learning)" (Content notes, personal communication, November 20, 2017).

The need to work to accept diversity as a value in the team and for the process was increasingly imperative. The difficulties in advancing the process of organizational change, weighed especially on some people who began to feel that the exercise of their leadership was going to be a more difficult task to carry out than they initially thought: "I came here full of hope, but lately on a practical level I feel that I cannot apply it." (Content note, personal communication, March 23, 2018).

However, other people were more hopeful about the change: "For me it is a challenge on how to manage in a reality like this, where there will be moments of greater conflict. We have to see how we can go about talking about it, informing *why we do* things." (Content note, personal communication, July 5, 2018).

These comments reflected the turning point the group was heading towards, the awareness of the dynamic element of the process. At that turning point the practice showed the possibility of looking at the theory from another perspective. This was the key moment in which something changed with respect to the way of understanding the dialogue, in which the team itself was aware that something was happening: What if what is happening – tension, lack of consensus, diversity that does not converge on one point – was also dialogue?

5. Theoretical frameworks that allow resignifying the dialogue to understand the situation

The question derived from the aforementioned experience can be understood as the beginning of the research team's search for more suitable frameworks to address the processes of dialogue in action research. Part of this literature already existed when this case study took place, however, the team started from an interpretation of the consensus-oriented dialogue. We believe that there are still action research teams that prioritize this interpretation of dialogue. By providing this conceptual section, as a continuation of this case study, we intend to help readers face similar dilemmas, to connect with the concept of dissensus from that experience.

5.1. Overcoming the division in approaches to dialogue in the organization: a dialogical approach to advancing the process

If we understand organizational change as permanent, evolutionary, unstable, as a constant flow of social relationships, we need an approach to dialogue that includes diversity as the organization's relational essence and engine of development. We do not want to construct a "caricature" to explain order (Tsoukas and Chia, 2002, p. 568) when reality is richer, more varied, more diverse and more complex.

To make a comprehensive analysis of organizational change we should go beyond those reductionist divisions of complexity and perhaps assume what Garmann Johnsen, Holstkog and Ennals (2018) propose: that organizations are by nature human discourses and decisions in which the dichotomy of "good" or "bad" depends on how those discourses develop and evolve and how they are taken into consideration in their management.

Action research on dialogue in organizations must be approached from perspectives that have to do not only with what is said, with words, but also with how it is said (ontology of language), its material and cultural context, and taking into account power as a variable (Gergen et al., 2004).

Change is itself a never-ending process that requires a constant construction of meaning through and for the people involved. Therefore, it requires a high level of interaction among the members of the organization. It means that "change" becomes an endless challenge in terms of having to co-construct through people's participation (Jabri, 2017, p. 10).

Dialogue, in these circumstances, must be no longer a tool but a need to maintain 'responsiveness' in a more conscious place, only by keeping those interactions active and open is progress made in the constant change.

5.2. The dissensus approach, an approach that allows us to rescue the dialogical essence of dialogue and the reality of the organizational context of change.

In Organizational Theory it can be said that two divergent perceptions of understanding organization coexist: harmony-consensus; and conflict-dissensus (Kristiansen and Bloch-Poulsen, 2014, p. 204–205). The first considers organizations as stable structures formed by well-integrated elements where all elements of the organization have a function. The goal in organizational life is none other than to maintain order and contribute to the organization by agreeing on shared values. In the second, organizations are seen as tensions between different interests where issues of power are implicit. Conflicts are not threats but disagreements between parties that produce tensions, but at the same time provide opportunities for learning.

If we take into account this second perspective, we see that dissensus and conflict cease to be something to be avoided or fixed, since they are integrated into the essence of the organization as constituent parts of it and an engine of change. But in general, it is a difficult approach to assume because it could seem that an organization understood from this perspective lives in a permanent "restlessness."

Inspired by the Scandinavian tradition led by Bjørn Gustavsen of "democratic dialogues," Kristiansen and Bloch-Poulsen (2013; 2014; 2006, 2010, 2014, 2017, 2021) apply the approach of dissensus as a critical perspective to the analysis of dialogue in their action research processes. In fact, this perspective permeates throughout this article that undoubtedly finds inspiration in Gustavsen (2007).

At this point it must be emphasized that making dissensus visible as a constituent element of the dynamics and development of organizations does not imply denying the existence of consensus, but rather it implies not perpetuating a way of thinking about organizations (Buela, 2016). Dialogues should be organized in such a way as to allow all points of view to be expressed, silent voices to find space and criticisms to be heard. Therefore, the dissensus approach is born of situated thought and requires practice (Buela, 2016, p. 27). There is a need for spaces where it can be found. And for this to be possible Kristiansen and Bloch-Poulsen propose a double perspective of the dissensus approach (Kristiansen and Bloch-Poulsen, 2010, p. 161–162):

- *Dissensus organizing:* Dialogues should be organized in such a way that all points of view can be expressed.
- *Dissensus sensibility:* relational quality that means openness to address potential disagreements or tensions in team conversations, whether categorical (different viewpoints) or relational.

Thus, the dissensus approach in dialogue, proposed by Kristiansen and Bloch-Poulsen, tries to make criticism and different interests a legitimate part of the process, thus including them. It thus activates a process in which differences in points of view, interests, tensions and conflicts are used as a vehicle to generate innovation. What is interesting is that dissensus becomes a "vehicle for change" (Kristiansen, 2013, p. 96) through dialogue.

6.   Revisitingthe case: Diversity, different feelings and consensus, a light along the way

At the beginning of the article, we described this case as a process of failed organizational change. This responds to an initial interpretation of the case from the classical perspective of the theory of dialogue. However, this does not mean that it did not generate very relevant lessons. The new theoretical frameworks proposed in the previous section allow us to return to this case and reread it through new perspectives in relation to consensus and dissensus.

Given the story, today we can ask ourselves what perceptions each person had about consensus and dissensus, what value they gave to these terms and what they meant for each of them in their day to day. We may also ask ourselves how those concepts had been constructed in the collective imagination of the organization and to what extent that way of understanding them could determine the way in which the initial steps in the change process were being taken.

In any case, it was recognized that each person's unique feelings, their diversity, made the process of change and the work to be developed more complex: "It is difficult to work with people who are not the same as you." (Content note, personal communication, November 20, 2017)

For some people this diversity represented something negative: "We confused not agreeing with a bad vibe." "There has to be a good vibe." (Content note, personal communication, November 20, 2017). For other people diversity was a natural thing that in no case should constitute an obstacle: "That is professionalism: accepting what is different," "There is diversity of roles, opinions, people. We (this group) are the example," "We are different." "Different roles, potentials." (Content note, personal communication, November 20, 2017)

For others, the different attribution of value was at the origin of this diversity: "Some capacities are valued more than others." (Content note, personal communication, November 20, 2017)

Undoubtedly, this different way of experiencing the difference, and what it could mean in the process being developed, generated questions that led the group to place itself differently in what the consensus refers to: "How do we act with respect to this? [to the fact that we are all different], do we try to work on it or not?" (Content note, personal communication, November 20, 2017)

One of the statements even questioned the process of change itself since it could lead the organization to liquidate its diverse and plural nature: "We are going to change so that we all think the same." (Content note, personal communication, November 20, 2017).

This statement opened the debate of whether the narratives created in the processes of change generated change when they are monological, or what they really do is destroy the organization's own diversity. How was working on change through dialogue related to "thinking alike?" Does change mean eliminating diversity? Does working on diversity mean eliminating it? Why weren't they able to pick up and hold the various aspects of different perspectives? What concept were they having of change? What concept were they having of consensus? Why couldn't they progress from dissensus?

These questions also led to a state of uncertainty in which to openly consider whether change could be seen as something positive in organizations, or whether change was actually felt as a threat that permeated organizational processes with insecurity. This situation led to the question of whether dialogue could be the enabler of this new (and better) reality. It was not clear whether what they were looking for was to resist change so as not to lose the diversity that characterized them as an organization, and then dialogue became a not so efficient tool, or if that was the natural dynamic of a process of change. Was the research team witnessing that the reality of change was a complex movement and the concept of dialogue being worked on did not help to accommodate it?

The need to activate a critical perspective on the theoretical approach to change and dialogue as a tool to enable it became imperative. And as the process progressed, those chaotic dialogues were being accepted as something "normalized." They stopped being seen as a "problem," and instead were taken as a possible "symptom" that provided information to the group, thus allowing for a better understanding of each other.

Living in dissensus seemed to bring new elements to the change process, even more suited to the dynamics experienced, something that was reflected in the closing session, when asked the questions of how they feel when they leave and what they take away: "I leave restless and I get clarity. We repeat a pattern, but this does not overwhelm me;" "Well, today I was comfortable. I liked it. Now I have to think." "Fine. At one point I decided to not say anything. A step back." "Today I better understood what we are doing. I'm tired of dialogue, from opinions. We are in a loop. Happy to see it." "Satisfied and reassured by a thing we are unaware of in these sterile debates. The more you express it, the more you become aware and there will come a time when we might better communicate." "I leave satisfied. I like this space. We spoke serenely. I have the impression that we are moving forward with this. This has a meaning and an end." (Content Notes, Personal Communication, December 5, 2017).

So, could learning to sustain dissensus in dialogue be what this team needed?

7. Conclusions: Bakhtin and Sweden, a gateway to new and more complex dialogical perspectives. The value of the difference.

As a conclusion, let's return to the initial, specific objectives we aimed to reflect on. The first specific objective for reflection was *to reveal dissensus as an intrinsic element of* dialogue. The way in which dissensus emerges in the analyzed case involves integrating a broader view

of dialogue, seeing it as a process, not so much as a product. Understanding dialogue as a process and focusing on differences as a driver of change implies integrating dissensus as a natural element of it. Kristiansen and Bloch-Poulsen (2005, 2006, 2010, 2014, 2017, 2021) develop this proposal. In the research results, dissensus is revealed as an emerging and enabling element of change when the organization works on dialogue from a dialogical perspective where one side and the opposite emerge, tensions remain alive and forces oriented to unity coexist with the forces that welcome difference.

As for the goal of *showing the effects of integrating dissensus into organizational change processes*, we must emphasize that the organization is not always prepared to work on dissensus. Dissensus can be a frustrating experience in the process of change, generating unease and insecurity among the people who experience it. The stresses of change processes require an organization not only willing, but also prepared to sustain them as a valuable source of learning and knowledge *in*, *for* and *by* change. At the same time, mechanisms and competencies are needed so that these tensions not only emerge, but are sought and worked *from* them, *with* them and in the development of new relational and communicative models.

Finally, as for the last objective, *to open new lines of research from the action research,* below we outline future lines of research:

- We must continue to generate interpretative frameworks that enrich the experiences that are generated in organizations.
- Organizational life should be investigated further, not what it should be, but what it is. Perhaps then the theory would gain substance.
- It is necessary to counteract the monological, linear and simplified accounts of complexity in organizational theory.
- More processes of change observed and analyzed in depth would be needed to validate results.

The dissensus approach opens a world of reflective possibilities that leads to expanding the initial concept of dialogue; it is an approach that better reflects the complexity of human interactions in organizational contexts, and that is why we consider it as a proposal to be taken into account in organizational processes of change.

As Bager (2014) points out, the neoliberal quest to achieve and obtain efficient, streamlined and controlled organizational environments seems to be a chimera. Demonstrations of monological authority, which need not be authoritarian, and centripetal forces seeking unity and consensus in and through the processes of change themselves, rule out the heterogeneous nature of organizational life. This narrows down their views and does not reflect the circumstances and complexity at play in human interactions in organizational settings.

In organizations, many models of how to understand it coexist. This plurality creates tensions. Pure models of organization do not exist, but we are faced with a plurality of models or approaches that coexist in organizations, in their processes, in the minds of each of the workers, and in the subsystems that compose them. The lack of references that counteract these interpretative frameworks and allow re-signifying the concept of *control* in the new reality means that people also do not know how to act in the face of certain challenges and adapt to what they already know.

Organizations do not need simplifying frameworks of their reality but, on the contrary, theoretical frameworks and paradigms that accommodate tension, paradox, contradiction as

their natural elements that provide people and teams with integrative and broad approaches to reality that consider the organization as a space of experimentation from which to nourish and question the organizational theory itself to continue advancing in its practices; action research becomes one of its most valuable tools as it has tried to show in this article.

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Exploring the Transformation of Habitus: a Case Study of Forum Theatre in Estonia

Nikolai Kunitsõn

Abstract: Habitus is a key concept in Bourdieusian social analysis, which is used to explain (lack of) change in society. Bourdieu was optimistic about the possibility of change in society, but he did not provide an exact recipe for this. I will try to fill this knowledge gap by providing an empirical example of transformation of habitus. In order to achieve this aim I will utilize a Participatory Action Research method called Forum Theatre from my fieldwork with the Russophone minority in Estonia. In results, I will address the change of habitus of participants.

Keywords: transformation of habitus, participatory action research, Forum Theatre

Explorando la Tansformación del Hábito: un Estudio de Caso del Teatro Interactivo en Estonia

Resumen: El hábito es un concepto clave en el análisis social de Bourdieu, que se utiliza para explicar (la ausencia de) el cambio en la sociedad. Bourdieu era optimista sobre la posibilidad de cambio en la sociedad, pero no propuso una receta detallada para el mismo. En este artículo intento aportar a esta carencia proponiendo un ejemplo empírico de transformación del hábito. Para conseguir este objetivo utilizaré el método de Investigación Acción Participativa denominada Teatro Interactivo en mi trabajo de campo con la minoría rusoparlante en Estonia. Como resultado, abordaré el cambio del hábito de las personsas participantes.

Palabras clave: transformación del hábito, investigación acción participativa, teatro interactivo

1.   Introduction

Bourdieu's concepts of field, habitus and capital are used as a metatheoretical framework to analyse the social world (Bourdieu 1977, 1986). The interconnectivity and relations between these concepts constitute the core of practises of subject positions and co-constitute the objective structures of society which, in turn, constitute the subjective structures. Habitus, a central concept in the Bourdieusian approach, plays a pivotal role in these relations.

This kind of Bourdieusian approach is often deemed to be deterministic (e. g., see Atkinson 2020), explaining why changes in society are not likely to happen. However, Bourdieu himself was more optimistic about the possibility of change; he stated that it *is* possible to transform the habitus of individual subjects; however, he did not provide an exact recipe for this. This paper addresses this knowledge gap by contributing with an empirical example.

The article is built on two major pillars. First, I will provide a theoretical framework for transformation of the habitus, and, second, I will illustrate the process with an empirical example, using a participatory action research (PAR) method called Forum Theatre (FT). The main idea in PAR is that research is done in collaboration with participants; FT is an empowering method, where spectators of a theatrical play are invited to break the so-called fourth wall, and become *spect-actors,* therefore co-creating the play and being involved in the whole research process. This allows to research the change of habitus simultaneously, from the perspective of researcher, and research participants. The article therefore has multiple aims: First, to address the knowledge gap to Bourdieuseian approach in transforming the habitus, and, secondly, to research if the PAR process will influence participants habitus; if yes, then how and to what extent.

The article is structured as follows: First, I will provide an overview of the concept habitus in the Bourdieusian approach, followed by the elaboration of the division between primary and secondary habitus. This is followed by introducing the education framework of Dewey and Freire. Second, I will present a participatory action research method called Forum Theatre, and show how it could be used to transform habitus, based on the ideas of Dewey and Freire. This is followed by an example of my empirical fieldwork with the Russophone minority in Estonia. I will conclude with discussion on the process of field research and my findings.

The innovation of this article is built upon the above-mentioned idea of the separation of habitus into primary and secondary habitus, followed by a Bourdieusian abstract 'recipe' to address the change of habitus, implementing concepts like 'scientific reflexivity' and 'artistic creativity' (Gorski 2016, 288) for achieving transformation. I will share a case where FT as a method transformed the habitus.

2.   The significance of habitus

The action research process presented in this paper combines Forum Theater as Participatory Action Research with two core concepts from Bourdieu, scientific reflexivity and artistic creativity. To make the connection between action research and these concepts, the paper builds on the work of John Dewey and Paulo Freire. Consequently, the following subsections address Bourdieu's concepts first and Dewey's and Freire's next.

2.1.   Key Bourdieusian concepts

As mentioned, habitus is one of the key concepts in the Bourdieusian theoretical framework. The separation of habitus from the field and capital is done here only on an analytical level; typically, in the analysis, all concepts are intertwined and simultaneously observed. Habitus is defined by Bourdieu as the property of actors – "a structured and structuring structure" (Bourdieu 1977, 167). Three distinct, but interconnected meanings of 'structure' are present in this definition: 1) the term "structured" refers to the idea that past experience influences agents, the most notable being family and the education system – e.g the primary and secondary habitus; 2) "structuring" refers to the idea that past experiences constitute an agent's practices and, lastly, 3) it is a "structure" in the sense that it has some inner consistency.

For Bourdieu, habitus is used as a concept to explain why change is so hard to achieve, and how society and the subjects in society reproduce power structures, social inequality and positions in social space. From habitus, subject positions get the ideas and thoughts of what is normal and natural – e. g., recognition – but, at the same time, the mechanism is also present for other groups in society – e. g., misrecognition (Bourdieu 1986). In essence, habitus is about the way subjects feel and think, the way they act and, in its most abstract form, how they are. So, for Bourdieu, habitus consists of mental attitudes and perceptions of the past; in the present, at the same time, it constitutes subject positions' practices.

Habitus can be approached from a dual perspective – primary and secondary. The primary perspective sees habitus as produced by the family and more resistant to change, while the secondary habitus, which is acquired later – mainly in the education system – is more likely to change (Costa and Murphy 2015). Or, as Bourdieu and Passeron (1979, 73) put it:

> In the present state of society and of pedagogical traditions, the transmission of the techniques and habits of thought required by the school is first and foremost the work of the home environment.

As noted above, the habitus of children is formed by the family and it manifests itself in practices, such as actions in real life. The education system encourages children to reflect on the 'patterns of thought, perception or expression which have already been mastered unconsciously' (Bourdieu 1993, 228, quoted in Hooley 2013, 215). Habitus as such tends to reject new information and reproduces itself; the thought patterns and practices that are happening are largely unconscious. The issue seems to be that the education system in schools does not challenge existing mental frames – rather it reinforces them. Bourdieu and Passeron (1990) conclude that, even though the education system has a transformative purpose, it is often incapable of doing so because of the cultural capital inherited from the families.

As a solution, Bourdieu and Passeron (1979, 73–74) claim that the education system should be more egalitarian – thereby reducing inequality – and that this is possible by 'rational' pedagogy, which does not yet exist:

> Any real democratization, therefore, presupposes that these things be taught where the most disadvantaged can acquire them, that is, in school; that the area of what can be rationally. […] But *rational pedagogy is still to be invented*, and can in no way be confused with the pedagogies we know at present […] (author's emphasis).

Bourdieu stated that changing habitus requires, as a first step, reflexivity – making the invisible visible – followed by specific physical techniques:

> While making things explicit can help, only a thoroughgoing process of countertraining, *involving repeated exercises*, can, *like an athlete's training*, durably transform habitus (Bourdieu 2000, 172, author's emphasis).

In sum, for Bourdieu, habitus is a central concept which explains why subjects act in a society in a particular way; it consists of two parts: primary habitus – which is constituted by family – and secondary habitus, where the field of education plays a key role. The transformation of habitus *is* possible but it needs some kind of reflexive analysis and some sort of creative approach (Gorski 2016). However, before demonstrating the Forum Theatre method, I will demonstrate how these changes can be achieved in the education system.

2.2. Pragmatist Dewey and transformative Freire

In this section I use literature that is referential in action research to set some practice related principles that I consider consistent with Bourdieu's theoretical contribution presented in the previous section.

Dewey (1910) has developed a theory of education which states that the main goal of education should be developing problem-solving skills (e.g critical examination) in children. This means creating new habits, transforming the natural tendencies of the brain and helping to get rid of the useless habits, which children already have. Dewey claims that children develop habits and they continue to use them as long as they are useful – as long as they work. These habits come from past experience and prior knowledge (ibid, p. 13). So, the education system should not solely pass on information to the children, e. g., the knowledge part should not be viewed as an end in itself.

When a child encounters something new – a problem, then they need to step out of their "comfort zone" and analytically address the issue, reflect on different variations about it. In the reflection phase Dewey (1910) separates two stages: a) state of perplexity followed by b) act of searching or investigation. This means that during the reflection the students choose a new potential solution (a consequence), try it out and if it works, then this becomes a new habit for dealing with this kind of problem. So the idea is to apply this specific case in the future, to generalize. According to Dewey, the whole idea of education should be developing these kinds of habits in children, equipping them with the ability to learn.

However, Freire suggests that his problem-posing education should be an alternative way, where "men develop their power to perceive critically the way they exist in the world with which and in which they find themselves; they come to see the world not as a static reality but as a reality in the process of transformation" (Freire 1970:71). Here is one of the key elements from Freire that are used to experiment in practice with participants, e. g., subject positions Bourdieu's theory. If Bourdieu, in essence, described habitus as nonconscious, then one of the ideas in Freire's theory is to make the habitus and the oppression visible – to become conscious of the structures in society and the mechanism of the oppression. This will be further elaborated with the help of Forum Theatre.

It should be noted, that similarly to Dewey, Freire is not talking about changing the subject of what is being thought to students, it is more about changing the paradigmatic approach how people interact – it should be "democratic and transformative relationship between students and teacher, students and learning, and students and society" (Mclaren and Leonard, 1993:27).

Dewey and Freire's ideas overlap in many important aspects. First of all, they both see education (similarly to Bourdieu) as a way of domination or reproducing status quo. Also, they are both (contrary to Bourdieu) quite optimistic about the possibility of changing what education can bring to an individual. Secondly, they both see that previous experiences of a person influence vastly their possible actions towards problems. They see the problems as a way of learning, an experiment, where one's consciousness can change. They see these experiences precisely as education.

Thirdly, Freire and Dewey see the role of a teacher differently – a teacher is not just a holder of information, rather an active subject in this process and the same can be said about the student. This means transforming the role of the teacher. Lastly, they both see that via education it is possible to transform society, for Dewey towards democracy and for Freire

towards more radical socialist tradition. In the following section, I present a participatory action research method called Forum Theatre, which directly addresses contributions of Dewey and Freire.

3. Forum Theatre as a Participatory Action Research (PAR) method

On the one hand, the use of PAR methods is becoming even more popular than before (Bussu *et al*. 2021). The key idea in PAR is that research is done *with* the participants, not *on* participants. It is a form of action research, where researchers collaborate fully with the participants with the aim of transforming the latter in an ongoing process. It emphasises co-learning, participation and transformation (Greenwood, Whyte and Harkay, 1993)

PAR is considered to be political and aims to empower marginalised groups (Marshall and Reason 2007). In addition, PAR is considered to be not only a social research method but also a 'process and as a goal that social research should always strive to achieve' (Greenwood, Foote Whyte and Harkavy 1993, 175). This means not only that PAR is a research method but, in addition, that it aims to achieve large-scale commitment by participants.

On the other hand, Forum Theatre is used by social activists and drama educators across the world and, in recent years, has received increasing academic interest, for example in publications such as the *Sage Handbook of Action Research* (see Guhathakurta 2020), *The Sage Encyclopedia of Action Research* (Coghlan and Brydon-Miller 2014) or *The Routledge Companion to Theatre of the Oppressed* (Kelly, Boal and Soeiro 2019). Forum Theatre is considered to be a tool in participatory action research (for a detailed explanation see Wrentschur 2021).

Forum Theatre (FT) aims to give power to oppressed communities, enabling them to empower themselves (Boal 2000). The fundamental idea behind Forum Theatre and, in general, in Theatre of the Oppressed (TO), is that, if someone can perform actions on a theatrical stage, then this experience will help them to perform these actions (e.g., Bour-dieusian practices) in real life too. Here, I do not address other methods of TO (e.g Rainbow of Desires, Legislative Theatre, etc. – see Boal 1995 and 1998 for more information); rather I focus on Forum Theatre since this is the method that works at an individual level, rather than a psychological (Rainbow of Desires) or system/legislative level (Legislative Theatre). To be clear, FT as such does not focus only on the individual level; instead, it takes general problems and demonstrates them in a way that is understandable to an individual, although the ultimate aim is also to generalise these findings and apply them at a societal level.

The epistemological and ontological ideas of Forum Theatre are based on Freire's (1970) critical pedagogy, where the key concept is transformation. For Freire, education should be about a paradigmatic approach to how people interact – a 'democratic and transformative relationship between students and teacher, students and learning, and students and society' (Mclaren and Leonard 1993, 27). Ontologically, as mentioned, Forum Theatre-based methods are aligned with action-based researchers, where the aim is not only to explain the reality but also to change it (Coghlan and Brydon-Miller 2014).

One of the most comprehensible ways to think about how Forum Theatre works as a method is to imagine a traditional play in a theatre. Usually, people go to the theatre, they take

a seat and observe a scripted play – they become spectators. A typical theatrical play consists of different issues, problems, dramas and conflicts. The actors perform the play and the spectators watch what is happening on stage. The people are clearly distinguishable into two separate entities – actors and spectators – one group being active performers and the other being passive receivers. Forum Theatre aims to reverse this distinction. This method invites the spectators to become "spect-actors" (Boal 2000). This process is usually controlled by a facilitator (known as the Joker in the TO system), who acts as a mediator between the actors and the spectators.

Like traditional theatre, in Forum Theatre, a play is also presented to the audience. The play is typically based on a problematic situation inspired by real-life events. After a short presentation, the Joker starts a critical discussion with the audience, inviting them to deliberate on what has happened on the stage. The audience is offered an opportunity to discuss what they saw – what happened, what the main issues were and how this situation might be solved, etc. This is the "scientific reflexivity" part, which Bourdieu insisted on in transforming habitus. The spectators are engaged in dialogue between themselves and the actors, therefore becoming spect-actors.

As a next step, the audience is invited to "break the fourth wall" and transform themselves from being just "talking heads" into being even more active spect-actors. This means that any member of the audience can not only suggest possible solutions to the issues observed on the stage but can also have the opportunity to replace actors on the stage and try out their own strategy for solving the issue they witnessed – e.g "artistic creativity" – thus fulfilling the second criterion. The stage becomes a "sociological experimental site" (Wrentschur 2021, 637).

Typically, different solutions are proposed by the spect-actors and are tried out by the same people on the stage. The aim is not only to solve this particular situation but also to train people in how to react in similar situations in the future. Using Bourdieusian language, subjects not only passively receive information but, via reflexivity and actually trying to solve the problems – using their voice, their bodies – are also transforming their unconscious habitus, because they are being exposed to new experiences which directly influence their habitus. It could be said that, through this method, invisible parts of the habitus are made visible, upon which participants are then offered a chance to transform them.

It would be too simplistic to address Forum Theatre as a role-playing exercise – in fact, quite the contrary. The learning that subjects experience shares many similar traits with John Dewey's (1910) pragmatist education, the main goal of which is not to pass on information but, rather, to develop problem-solving skills which can later be generalised. This type of education means that new habits are created by transforming the natural tendencies of the brain and, at the same time, helping to get rid of the useless habits which children already have – the central claim in Dewey's approach is that children develop habits and continue to use them as long as they are useful, as long as they work.

In conclusion, by using Forum Theatre, it is possible not only to reflect upon problematic issues but also to take an active role and rehearse for any future similar situation. This perspective builds on educational ideas of Freire and Dewey, who both saw education system as a way to transform children habitus. Therefore, FT not only addresses the conscious and unconscious levels of learning but also helps to access the so-called "other" knowledge (Coghlan and Brydon-Miller 2014) which is crucial in transforming the habitus of the dif-

ferent agents; these, as stressed before, are the two main criteria required by Bourdieu to transform the habitus of a person.

4.   Fieldwork with the russophone minority in Estonia

4.1   Positionaly and role of the facilitator

I first provide some initial remarks about my own practical experience with implementing methods like Forum Theatre in Estonia and its neighboring countries. For more than ten years I have been using methods like, *inter alia*, Forum Theatre, process drama (a drama method where the students and teachers are working in and out of role) and improv theater (spontaneous, improvisational theater) in Estonia and elsewhere. I have worked with different age groups, with people who are unemployed, have mental health issues or are from different ethnic backgrounds, etc. Usually the aim has been to address specific issues, like communication between group members, oppressions in the labor market or developing social skills. I have also written several handbooks on this topic. This previous experience is vital because Forum Theatre is a demanding set of techniques for a researcher.

In qualitative research, especially in methods like PAR, it is vital to reflect on your own role and position. Reflexivity is also about being empathetic and engaging in critical self-reflection (Pacheco-Vega, 2016), which is also a common idea for TO. I am aware that my positionality have affected my research, but it is common in qualitative research. More important than being 'objective', is to reflect honestly on my positionality, or as Berger have put it "As such, the idea of reflexivity challenges the view of knowledge production as independent of the researcher producing it and of knowledge as objective." (Berger, 2015:220). Keeping that in mind, my ethnicity is Russian and ethnicity is a delicate matter in Estonian society. So the question I had to repeatedly ask myself before the research and during it were the following: How will my ethnicity influence participants in my research? Will they be more open to me since we share similar backgrounds? Or will they think of me as an outsider? Keeping all these questions in mind and deliberating upon them, I believe that I managed to become an insider, part of the group, since they opened up and shared their thoughts and ideas with me.

4.2.   Aim and the description of the group

As mentioned previously, the aim of this article is to see whether and how Forum Theatre as a method can change participants' habitus. This knowledge will provide an interdisciplinary approach to explain change in habitus, which is useful to more sociological, Bourdieusian scholars, but also provides a background for often more practical PAR community, explaining a wider theoretical context of achieving change in habitus.

My PAR process lasted around 10 months and involved activities with a group of young people. It was carried out in cooperation with a small theater company in Estonia (VAT Teater) and a vocational volunteer theatrical group (Lendav Lehm). I was invited to use forum theater as a method to gather information from Russophone community, which would serve as

a basis for a play, focused on young people issues in Estonia. The project was implemented by VAT Teater[1] and partly funded by the Goethe Institute in Estonia[2]. I was in charge of working with the Forum Theatre to gather information for VAT Teater play, and all participant (in case of underage participants) signed the form where all their rights and obligations were listed. The Ethics committee of Tallinn University was consulted with creating the consent form.

The 19 participants were aged between 14 and 21 years old. Also, there were two group leaders, who were a bit older. In total, we held workshops, every week, from March to June and from September to December 2021, which lasted, on average, two hours each. Some weeks we were not able to meet because of the COVID-19 restrictions. Some participants were involved only in the first half, while others joined after the summer break; however, in total, six participants were present throughout the whole process. I used a field diary during these sessions and gave them my feedback after each session. In addition, two focus-group interviews were conducted with participants, in June and December. During the ten-month period, in addition to our weekly meetings, we also conducted six workshops with participants in a local school to gather input for performances, which we did later in the school. In total we did eight forum theater performances, six in the above-mentioned school, one to another theater group and one focused on integration issues in Estonia.

Most of the people had no prior experience, either with Forum Theatre or with acting in general. They did not know each other very well. While the majority had Estonian citizenship. one of the participants had Russian and one of them Ukrainian citizenship. They shared few similar features: their native language was a minority language in Estonia – e. g., the Russian language – and they were all pupils in school or students, the exception being the older group leaders.

4.3.   Process description

In Forum Theatre (Boal 1979) the personal stories of participants, which include conflicts and oppression, are collected via different methods. Kaptani and Yuval-Davis (2017) have noted that Forum Theatre as such consists of workshops and a play. The workshops aim to transform the typically passive spectators into active actors (e.g spect-actors). Usually, in workshops, different situations of oppression and conflict are discussed and presented to each other in smaller groups. The workshops aimed to prepare participants to take part as actors in Forum Theatre plays. We used a set of games and exercises (Boal 1992) in our workshops. These and other tools used in theatrical practice are used to develop the participants' personal stories into collective and more abstract relations of power inequalities.

In the first two months, the aim was to "warm-up" the group – meaning that they got to know each other – thus creating a welcoming and trustworthy atmosphere. Then we started preparing for plays, coming up with different issues that we wanted to tackle – for example, miscommunication between different ethnic groups, mask-wearing in public spaces,bullying in schools and problems between pupils and teachers, etc. In addition, we conducted six workshops in a local school with children. The workshops were done in cooperation between me and participants, and the aim was to gather the data from pupils as an input for the forum

1   More information https://vatteater.ee/en/lavastused/woke-vihane/
2   More information https://www.goethe.de/ins/ee/et/ver.cfm?adress_IDtxt=Cieszyn&event_id=22700122

theater play which we later performed at the school. At the same time, the participants who did the workshop received an opportunity to try out different exercises and have a role as a facilitator. In addition we had two other performances. One play was conducted to discuss miscommunication issues between different ethnic groups in Estonia and was conducted to another theater group. Other forum theater play tackled citizenship issues in Estonia and was performed as a play during an integration focused event. In all the plays the group participants were actors and I served as a Joker. As they are not particularly relevant for this research, the content and the spectators of the plays are not discussed in more detail here, but the impact of these performances and workshops are taken into account in the next section.

Figure 1. Workshops and play.
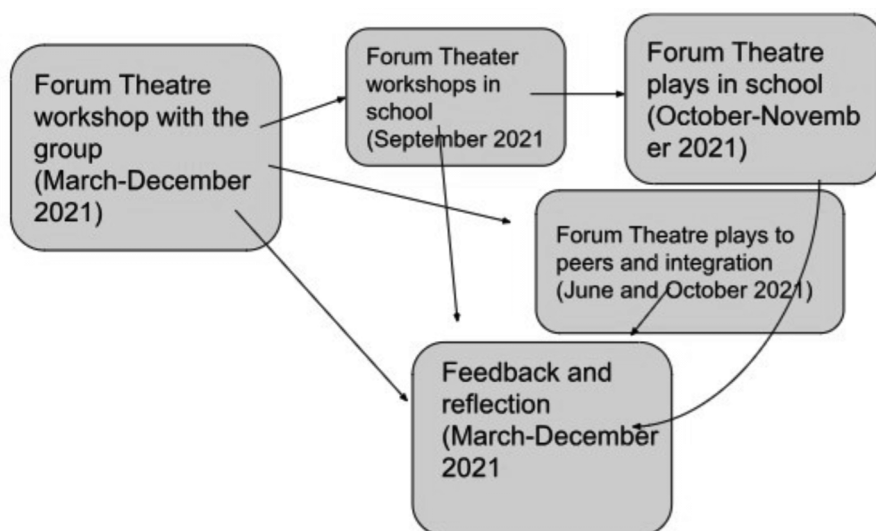
5.   Results

The main aim of my empirical research was to find out whether this 10-month process had any influence on transforming the habitus of these participants, and if yes, then how and to what extent.. I combine my own fieldnotes (research diary) with my observations and with re-spondents' thoughts and opinions on the process. I also took videos of the performances, photographs and had two focus group interviews with the participants. The gathered data was rich, thick and vivid. I used thematic analysis for all the data and will present the findings in two interconnected themes: participants' experiences of the process; their understanding of FT and the influence of FT on their habitus. I will not describe all the events separately, rather I look at the general result of this process what happened from March to December 2021.

5.1.   Experience of the process

I addressed the experience by asking participants different questions about what they remembered from the process, how they felt during the process, what emotions they had and why they voluntarily kept coming almost every week to the workshops, etc. It was necessary to address this from multiple perspectives since the participants were relatively young and it is not sufficient just to ask directly about change in their habitus, since it is largely unconscious.

All the participants agreed that this process had been fun; in general, they had positive feelings toward it. They particularly brought up the beginning of our workshops, where we played different games and exercises, one of the aims of which was to create a sense of equality between participants and a democratic context. The results show how crucial it was to take the time and put in the effort to enable the people to get to know each other and feel comfortable sharing personal stories. For example, one of the participants shared her own mental health issues and reflected upon the time when she had depression and suicidal thoughts.

From the first day I was like WOW, I want to know more, this is very interesting. It was fun, interesting, a little bit scary, because, well, it was a new thing, but then I became comfortable and, yeah, I liked it a lot, it was interesting.

The participants also mentioned that they liked the process of creating a Forum Theatre play, although FT itself was confusing to them before they actually went on the stage for the first team. They had never before experienced this kind of activity, where there is no director *per se* but where all the ideas are discussed together and they can voice their own opinion. In Forum Theatre it is important for participants to see things from different perspectives, rather than only from their own perspective, as the following quotes show:

- The idea of Forum Theatre, that we have a problem and we solve it through a play, that was interesting.
- I was just interested that I understood, well, that I can live here in a real-life situation, I can experience different ideas about what to solve. It like, I felt so free, every time the situation is different.
- Then, this, just, you have a problem, you get into this and then you solve it with different possibilities, I mean, yeah, that was interesting.

The part the participants liked the most was the performance. Participants reflected that they were nervous, especially before their first performance because they had little to no experience. However, as the performances started, many of them relaxed because, in Forum Theatre, they did not have fixed sentences that they needed to memorise; rather it was a more improvisational process, where they got to know their character and where creativity was encouraged. Of course, there are different ways of doing FT, some of which do encourage memorising detailed lines but this was not the case here. This provided a lot of learning opportunities for participants: as they demonstrate:

- I liked that people came onto the stage and showed their perspective, You understood immediately that you can do it differently – before I didn't think about it.
- Today somebody tried something and my first reaction was "What crap! It will not work". But today it was like, we didn't come here to criticise, who is good and who is bad, and I realised that we see the world differently and experience differently. I don't know, I am kind of inspired, I would like to go to on the street and propose that we change this world!

- Yeah, for the 7th Grade, it was similar to what they proposed, but they came and tried to solve the problems, that was cool because You could really see that they had this problem in school.
- The cooperation with other people – especially with this Estonian group – and I liked that we raised this issue of the language barrier and not wearing a mask on a bus and it was so cool to change between the languages; it was a good experience in communication and I liked it.

I asked the participants to reflect on Forum Theatre – what it meant for them, how they would explain it to other people and so on. For the majority, it was difficult for them to express exactly what it is. In collective discussion, they argued about whether Forum Theatre is meant to solve problems or just to raise issues for discussion.

- No, it is more like, thinking about some problem, and then seeing possible solutions from people, and yes, I mean, You can solve the problem with this.
- Rather, you know, as discussion but, for the participant, he sees his idea implemented and for him, that might be a solution.
- Yes, you can, like, uncover a problem, make them visible to people.

Some participants had an opportunity to attend workshops with me and also, under my supervision, tried to be the Joker in performances. They valued this experience as it showed them how to perform in a role where they need to facilitate the process.

- I felt this moment, and then it was interesting and cool, that you didn't have to know it all, you had to use questions as a weapon, and it was very interesting what they were saying. Yeah, I kind of got to work it, but not for long, but yes, it was interesting.

5.2. Interpretation of the influence of Forum Theatre

Initially, I asked participants to think whether our workshops (conducted with outside participants) and our performances (eight in total) had any impact on them. Some were quite optimistic, some more pessimistic. What is interesting is that, usually, more playful learning is considered to be more effective with younger age groups; participants expressed the idea that, for younger people, the learning might be more unconscious but for teenagers and grown-ups, the reflective part is more thought-provoking.

- I think the one with citizenship, that made the people think.
- Yeah, like, they remember it but don't remember it, so maybe next time they have, like, some knowledge of what to do with it.
- I think that, for older children, it had some influence but younger children, I don't think they will remember anything when they grow up.

One spectacular case happened during one of the performances. We conducted a play where the teachers disliked some of the students without having any objective reasons and one class of participants identified with this theme. They said that it was exactly their situation and then they started rehearsing how to stand up to their teachers as a whole class. The case was about a male teacher who was treating female students as lower class and was constantly commenting on the clothes and appearances of the girls. In addition, he showed a much more relaxed

attitude towards boys, and graded girls harsher. All the girls felt very frustrated because of it, and the boys also agreed that this kind of behavior was not justified. We rehearsed different options of confronting the teachers by boys and girls, going to the principal, writing letters to officials, talking to parents, etc. Unfortunately, I do not know how these things evolved, since the focus of my research was on the experiences of the initial group, not on the participants from the school.

- Well, yes, for that 10th Grade, it was like a revolution.
- Yes, for that 10th Grade, definitely, it influenced them.

It was difficult to ask them directly if Forum Theatre had had any influence on them. So I addressed this question from different angles – what new things they had found out, whether they now looked at something more differently, whether they gained any new skills, etc. In the beginning, they focused more on the knowledge aspect – that they found out what Forum Theatre is, that it bettered their improvisation skills, that they became more confident and discovered things about citizenship or bullying, etc.

- A lot of practices with performing, acting skills and all this.
- Finding out what Forum Theatre is, all these games that we played were good, might use them… Found out some new things in general, like what kind of person someone is.
- I was, like, more confident.

Later, they started reflecting on their own perceptions of what had changed over time. Many of them mentioned that they approach some situations differently, that they are able to understand that there are multiple perspectives on different issues and that they have implemented some of these problem-solving skills in real life.

- Well, problem-solving, if there is a problem, then I immediately think how I can solve it, like I rethink my life, what I would do in this situation, and think of different options.
- I, like, saw bullying in my school and then I stepped in and I, like, used Forum Theatre to solve the issue in my school.
- I saw one situation in school, and then I was like, oh this like Forum Theatre.
- These topics that we discussed, they, like, they are about me also. You, like, look at things from another perspective, like I can pause this moment and think about different outcomes, what someone else would do.
- I was, like, fascinated by how people think, like, every time, this expands your point of view on this situation and I think I should take it with me to everyday life.
- Well, it is weird but I feel like I increased this skill, to, like, look at things from another perspective, that I am used. I have a perspective, but if I imagine there is another perspective, what is it? It happens in your head, helps to resolve situations. You can understand, or imagine what another person thinks.
- I think that Forum Theatre is a very good practical activity to develop empathy, because how would you do it otherwise?
- We can prepare ourselves for the situations we get in, not, like, what is right and what we shouldn't do but, like, it is a real-life situation and it can be resolved in different ways, you can approach it differently.

6. Discussion and conclusion

During this ten-month process, I felt that this group became a closer and tighter-knit community. This is definitely one of the key things to take into account when looking at quotes from interviews. These people spen quite a lot of time together, sharing their thoughts and emotions, ideas and fears. It is evident from my observations, notes and interviews that people liked coming to the workshops and performing. Usually, I started the workshop with a welcoming circle, where everybody would say their name, answer a random question proposed by me and how they felt, on a scale from (lowest) 1 to 10 (highest). Usually, by the end of the workshops, everybody's mood was improving. This is a simple, yet effective indicator of what kind of connections these workshops managed to constitute.

As is evident from the results, people in general enjoyed the process – the games, discussions, exercises and the performing and analysing different real-life situations. The workshops were firstly built upon getting to know each other and then two key Bourdieusian ideas – scientific reflexivity and artistic creativity – were implemented. We had a healthy balance between discussing and acting and it seems that it was successful from the perspective of enjoyment. Since the participants mostly had no prior experience in acting and Forum Theatre is an atypical format, it took time and effort to prepare them for the plays. We worked on the content of the plays together, having already implemented the ideas of Freire and Boal in the workshops.

The performances were, for the most part, liked most by the participants. They highlighted the moments which were a learning experience for them – when they started to see alternative solutions to issues, when they were surprised by propositions from the spect-actors and when they had to overcome difficulties in acting on the stage.

This study builds upon other studies, which has explored TO and its effect. For example, Österlind (2008), has shown in her work that Theatre of the Oppressed can make individual habitus visible and also provide tools to facilitate the change. More specifically, this study builds upon this, and takes it a step further, by not only making habitus visible, but continuing on exploring the possible transformation. The central issue of this article – the question "Did it change participants' habitus?" – can be answered with yes, but with reservations. Since the primary habitus, formed by parents, is difficult to change, the focus was on transforming the secondary habitus. The results from my fieldnotes and focus- group interviews clearly show that problem-solving skills, empathy and the willingness to see the world from another perspective were all there and had improved, at least from the perspective of the participants.

On the one hand, since "talking the talk" is only one part of habitus and real-life practices are a different part, it is too difficult to conclude with certainty that their habitus has been transformed radically; however, it is safe to assume that this experience has transformed their habitus at least in some aspects. On the other hand, since habitus is about the way we see the world – what we (mis)recognise – then it could be said that some transformation took place. To conclude, Forum Theatre as a method *can* be utilised to transform the secondary habitus of subject positions but it is a long process and needs digiliant procedures in order to achieve success. Further research is needed on evaluating and measuring the change of secondary habitus.

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Declaration of interest statement

The author reports that there are no competing interests to declare.

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Slow science and "caring" research – the transformative power of collaborative research with hard of hearing youths

Barbara Mihók, Judit Juhász, Judit Gébert

Abstract: In our paper we explore the transformative power of a collaborative research on our own academic perceptions and functions. We have been working with hard of hearing youths since the autumn of 2021 in Szeged (Hungary) in a social citizen science case study within the YouCount project to increase social inclusion in the city. During the process, we, authors of this paper, as senior hearing academics, identified significant aspects where our academic functions led to inner transformations. These experiences led us to recognize the overwhelming importance of relational aspects and caring, the perceived and fostered "slowness" of the research. Inclusion can be viewed as a joint and interdependent transformation of all actors involved towards the defragmentation of community.

Keywords: inclusion, phenomenology, relational dimension, embodied knowledge, defragmentation

Ciencia a fuego lento e investigación sobre los cuidados- el poder transformador the la investigación colaborativa con jóvenes con diversidad auditiva

Resumen: En nuestro artículo exploramos el poder transformador que tuvo un proceso de investigación colaborativa sobre nuestras propias percepciones y funciones académicas. Hemos estado trabajando con jóvenes con problemas de audición desde el otoño de 2021 en Szeged (Hungría) en un estudio de caso de ciencia ciudadana social dentro del proyecto YouCount. El objetivo era aumentar la inclusión social en la ciudad. Durante el proceso, nosotras, las autoras de este artículo, como académicas senior sin problemas auditivos, realizamos aprendizajes significativos sobre nuestras funciones académicas que nos llevaron a transformaciones en nuestras formas de operar. Estas experiencias nos llevaron a reconocer la abrumadora importancia de los aspectos relacionales y de cuidado, como la "lentitud" percibida y fomentada de la investigación. La inclusión puede verse como una transformación conjunta e interdependiente de todos los actores involucrados que nos conduce hacia la desfragmentación de la comunidad.

Palabras clave: inclusión, fenomenología, dimensión relacional, conocimiento encarnado, desfragmentación

1. Introduction

Hard of hearing (HH) young people are a marginalized social group facing many challenges in terms of inequality in education and employment opportunities among others in Hungary. Emancipatory and participatory approaches and a more detailed picture on hard of hearing

youth well-being is needed to increase social inclusion. As part of the YouCount consortium (GA No.101005931) in 2021 we started a youth citizen science project with HH youths for social inclusion in Szeged, Hungary. This citizen science project was a continuation of a previous university project aiming to explore the health equality issues of HH families in Szeged in 2018–2019 (Bajmócy et al. 2022, Gébert et al. 2022). The recent YouCount research process has been aimed 1) to investigate and articulate how hard of hearing youths evaluate their own subjective well-being and social inclusion and 2) to reflect on social inclusion and inclusiveness in the ongoing research process: as senior academics, to explore and thematize our own experience on working towards an inclusive research. During the first 1.5 years of the collaborative process we, senior researchers experienced transformational changes in our professional functioning. In this paper we intend to focus on our second goal and present these transformational changes as an interconnected web of professional and personal experiences that had substantial impact on the development of our theoretical and pragmatic approach towards inclusion. The questions we are addressing are: How were we transformed as academic actors by participating in the research, and what were the experiences that led to these transformations?

In demonstrating our case, we start with the storyline of our collaborative process, followed by the discussion of various phenomena of experiences. We commit to the phenomenological approach to research (see: Papineau 1996, McTaggart 1994).

Phenomenology is a school or movement of contemporary philosophy that emerged at the beginning of the 20th century, following the work of Edmund Husserl. As Tőzsér puts it, the "goal of phenomenology is to systematically analyze conscious experiences from the first-person perspective—to explore and plausibly and exhaustively describe how things seem *to* the subject, from the subject's *point of view*. Phenomenology has strict methodological rules. One is that we have to take extra care not to let commonsense and scientific convictions affect our investigation. They have to be bracketed, so to speak, during the course of our phenomenological investigations. This is the only way for us to focus on the *intrinsic* characteristics of the subject's conscious experiences—those characteristics which the subject's conscious experience has from his own perspective" (Tőzsér 2023. p. 32). We aim to use the phenomenological method to describe in a faithful and systematic way the experiences we had during the research, starting with what our initial expectations were at the beginning of our research and how they have changed in the light of our experiences. The focus of our study is *not* on presenting the empirical facts and their correlations that we uncovered in our research (we will now put them in brackets in the spirit of phenomenology), but on describing our experiences, we underwent during the research and on describing how each phase of the research appeared *to us*.

By 'us', we mean here the three senior researchers of the project. Thus, our conclusions come from the phenomenology of our experiences alone and not from other participants'. After introducing our experiences, we reflect on the related scientific literature but our analysis remains a strongly phenomenological one.

Figure 1. Storyline of the research between 09.2021–12.2022.
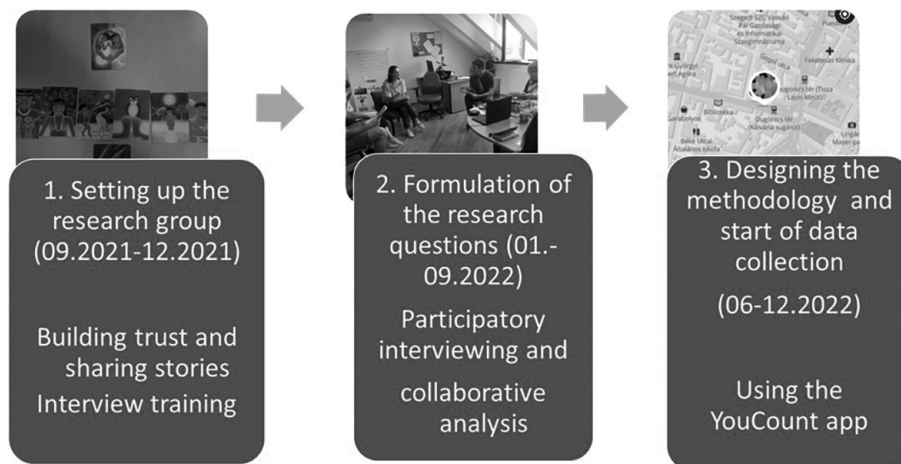
2. Storyline and methodology of the research

Preparation and brainstorming started in the summer 2020 as a follow-up of our previous research with teachers and families of HH youths (Bajmócy et al. 2022, Gébert et al. 2022). Recruitment of HH youths as citizen scientists and community researchers began in May 2021 via the networks of the University of Szeged, advocate NGOs and HH school. We organized individual face-to-face or online conversations with those HH youths who responded to the call, and in September 2021, our "Common Signs'' Research Group was launched with 3 young and 2 senior HH people, and 3 hearing students.

In the first 3 months of the project the main aim was to build up the research group, to establish a safe space and trust, to increase cohesion (Fig.1.). During the research group meetings we started the discussions with the theme of "good life", we shared personal stories about social inclusion and started to plan the next phase by a collaborative interview guide planning. In December 2021 a qualitative interview started addressing other HH youths in Szeged, exploring their everyday experiences on social inclusion issues. A few members from the research group were actively involved in interviewing and the research group members were also interviewed. Altogether 13 interviews were taken between December 2021 and March 2022. The interviews were analyzed in April and May collaboratively by the group members. Based on the interviews and a stakeholder forum (Living Lab), the research group summarized the emerging topics as possible research questions and prioritized them using a multidimensional deliberative evaluation framework. By August 2022 we finalized two specific research questions to be addressed in the next phase of the research as the core of our participatory inquiry: 1) What urban spaces do HH youths use and how do they feel them-selves there (in terms of social inclusion)? 2) Where are the "good places" (institutions,

services, persons etc. that are inclusive, easily accessible, supportive etc) in the city which represent resourceful hubs in the urban network for HH youths?

Beginning in August 2022 the research group developed the methodology and design of data collection. Since December 2022 data collection with the Spotteron YouCount App has been ongoing, with the HH youths recording their perception of social inclusion in the city of Szeged.

Between September 2021 and December 2022 altogether twenty research group meetings were held, where facilitated group activities were conducted with various tools (ice-breakers, association cards, drawing). One focus group and qualitative interviews were organized with 3 stakeholder discussion forums (Living Labs.) during this period. Besides group activities we regularly had one-to-one discussions with the participants, online follow-up and also organized Christmas parties (one online and one off-line) for more informal gatherings.

The research group consisted of hard-of-hearing seniors (2), students (3) and hearing seniors (3) and students (3–4). Hard of hearing participants have from moderate to serious hearing impairments, they wear hearing aids or cochlear implants (2 participants). They used lip reading as an essential assistance in communication. No d/Deaf or sign language user joined the group.

During these activities we, senior researchers, conducted research diaries, made field notes in each research group meetings and events and held regular self-reflection circles every 3 months. In these systematic self-reflection exercises we followed a list of reflection points while completing a self-evaluation concerning the process, the content, the aims and methodologies. Based on these documents (field notes, research diaries, self-reflection notes) we structured our experiences following a phenomenological approach.

3.   Embodied aspects of working with HH participants: Body-awareness in communication and organization of space

In this section we summarize our embodied experience in fostering inclusiveness throughout the research process. These experiences are closely related to the use and perception of our body and the physical space in which our bodies are moving around in relation to others.

From the beginning it became evident that the essence of the collaborative research process is the development of communication skills and the organization of space for interactions. We faced the challenges of how to use verbal and non-verbal communication when interacting with HH participants in an individual or group setting. HH interviewees who lipread shared their experiences on facing difficulties in communication with hearing people due to fast or non-articulated speech, or not visible facial expressions.

For hearing people, even if I say I am hard of hearing and lipread, he just can't help it and speaks too fast, doesn't look at me…they would need to learn about this. …But sometimes (hearing people) need more time for this to learn. (HH interviewee)

In the case of group discussions, a lot of preparation and planning goes to the spatial design of the group settings. How can we arrange seats so that everyone can see everyone in case there's a larger number of participants? Where should we position the presenter in relation to the

presentation screen so that everyone can see him and the presentation if there are others joining online who also need to see the presenter's face?

We managed to arrange the setting for the Living Lab, but there was one thing which went astray – those presenting had to stand in an unexpected spot so that G (who joined online) could also see their face. This was strange at first but they managed to cope. (Senior researcher)

Organization of space is a crucial step in ensuring inclusivity in the group discussions. As visual communication plays an essential role, organization of space is about creating a visually accessible and safely structured place. Safety in this sense means that specific needs are taken into account and everyone can freely express his or her own needs in case there should be some adjustment. Space organization has therefore a strong power dimension, only by the way we structure the places we can include or exclude people from the flow of communication. In addition, exclusion can easily happen even though the space is appropriately structured, if some participants have private conversations that others cannot see. As a result of continuous reflections on space, body and inclusion, we, hearing researchers, are becoming more and more aware of our own communication in the arranged space in the presence of HH colleagues.

I noticed that when we are talking among ourselves in the office (as hearing people) and a HH participant enters, suddenly the conversation changes. I turn so that he (HH person) can see my face even if I am not talking to him, I slow down and start to articulate more…I feel uncomfortable if I am having a conversation with somebody in the room and my face can not be seen for everyone. (Senior researcher)

If there is a HH person present, mindful awareness of his or her spatial position increases. There is a constant "scanning mode" we switch into, sensing the gaze or the orientation of the HH person's attention. We started to be more aware and control our bodily posture and the orientation of our face. As our sensitivity increases, exclusion is an alarming possibility, which we want to avoid by "making it right". This means more self-awareness in terms of positioning, speech speed, articulation and non-verbal communication. This also leads to the decrease of spontaneity in talking. Quick verbal exchanges between hearing members that are not visible to detect, can have an excluding effect to those who can not hear, and therefore a constant consideration of what to say and how, slows down the stream of verbal communication in the group.

How we sense our environment, behave, move our body, lips and articulate (among others) led to a deeper embodied experience for us throughout the research process. In our case, promotion of inclusion in this sense becomes acquiring embodied practical knowledge guiding us through our interactions and relational experiences. Our experience is somewhat similar to that of Hammer (2013) who, in her ethnography research with blind women, wrote about the central role of the body in the field, functioning as a source of knowledge. As she described: "I used my body as a tool in collecting data and knowledge within research observation" (Hammer 2013, p. 9.). The increase of our awareness concerning our body communication and orientation led also to an expanded awareness of the space and the people in this space around us. These experiences teach us a lot about the condition of hearing impairment, however, we gain more knowledge on the meaning of being "able" and hearing as well. Hammer (2013) talks about her experience as: "I had to conduct this research not only in order to better understand the life experiences of a blind woman, but to learn what it means to be a sighted woman, and more specifically, what it means to experience sightedness". Hammer (2013, p.13.). In our case, moving and communicating differently in space in order to

connect with others taught us a lot about our own functions, routines and perceptions as hearing people. This exploration of embodied knowledge through experience can be also related to the concept of "carnal sociology" (Wacquant 2015) in which body is a tool for inquiry not the subject of inquiry (inquiry *from* the body).

4. Research as a healing experience: the process of building trust and safe space

As academic/senior researchers, we spent several months preparing for the participatory research. We thought about our communication channels and methods and tried to predict the future. We wanted to be as prepared as possible for the research with hard-of-hearing youth. One of us expressed her a priori expectations and concerns as follows.

"Working with hard-of-hearing young people will be completely different… We need to think about how to formulate our (research) questions in the simplest, most realistic, and tangible way, and then build the right methodology to capture their answers. It will probably require a completely different pace, attitude, and presence… It will certainly be a challenge, but it is very important to learn more about their reality and lives, how they envision the future, what they dream about." (Senior researcher)

Though our well-articulated intention was to develop a good connection within the research team from the beginning, the overwhelming importance of creating a safe environment and trust emerged unexpectedly in the research group's first meeting. As each member of the research team arrived one by one, the atmosphere of the room, our attitude and our presence as researchers suddenly changed and became extremely focused on the well-being of the participants: whether they felt comfortable and safe. All three of us shared this intense caring by simply being with hard-of-hearing youth. Although we have been consciously preparing to work together, our reaction was more of a sudden and instinctive reaction.

Following this initial experience, conscious trust-building and creating a safe space played increasingly important roles in all channels of the research process which turned out to be a healing process as well for all participants. Therefore we started to reflectively explore and put into practice the meaning of trust and safe space.

4.1. The foundation of trust and safe space: connecting through communication

It became an essential need for us to ensure the autonomy of the participants and enable everyone to participate and speak freely and equally in the meetings. As much as we have instinctively listened to the needs and experiences of them, it has been - and still is - a challenge to put accessible communication into practice. As we reflected on the importance of body communication and orientation in the previous section, it is indeed difficult to always communicate in a way that everyone feels part of what is happening. Besides the inclusion of HH participants, we should also strive for a safe environment and full participation for hearing members, too, not to mention the online attendees. Hybrid meetings are especially demanding, since with hearing aids, the voice from the speaker is often not perceived completely and

online HH attendees can have difficulties with the quality of audio transfer. In a few cases, such as the first Living Lab, we struggled with the technological devices.

We sat in a circle. There was an online participant, the mic was passed around. If someone didn't understand something, I summarized it. It was important that participants could read lips and see our faces. (Senior researcher) Hearing aid was connected to the speaker, however, they could not hear each other. This suddenly surprised me. There were also unexpected technical difficulties, the microphone was discharged and there was extra noise filtered through the zoom. (Senior researcher)

In many cases, hearing members (including ourselves) and sometimes hard-of-hearing participants as well tended to speak fast. There's been a constant dilemma about whether to give feedback to the speaker on this or not, as it can easily give a paternalistic or controlling impression. Concerning this dilemma, trust has brought some progress. Hard-of-hearing participants started to speak up more often when they missed something. Along the way, strength and weakness of the communication itself have often been a topic of discussion in the research group in order to improve further meetings. However, we couldn't always be sure that communication was flawless and everyone "got it". We had also concerns that if we direct our attention towards the HH members too often - e.g. asking repeatedly whether they fully understood or not -, it can put them under a lot of pressure and creates an uncomfortable situation. These experiences highlighted the need for a delicate balance of focused/scattered attention, asking for feedback/observing in silence, or just letting it be.

As we learned, potential mistakes are not a matter of oppressing or disrespecting a 'disadvantaged group', but part of being together, getting to know each other, and social learning. We realized, for instance, that lip reading is an extremely tiring process, therefore we should take this into account when organizing meeting schedules and duration.

It's not enough to have the technology, structuring the conversation, pacing, and continuous monitoring are also essential. (Senior researcher) It (group meeting) was a bit long, 2 hours was very tiring, especially for X who was post-operated. But he listened to it all the way through. We need to pay more attention to how tiring it can be for them. (Senior researcher)

4.2.   Essential step in building trust and a safe space: story sharing

Greetings at the beginning of the meetings, checking in on each other's current well-being in the opening and closing circles are all integral parts of the research group meetings. We often used cards and pebbles to help members share feelings and thoughts. Below is an example from one of the first research group meetings. In the opening circle we started warming up by asking participants to choose a card that best expressed how they were feeling at the time. The cards depicted various animals.

How are you? Why did you choose this card? (Senior researcher) I chose this swarm of fish because I face a major difficulty in my life, and it feels good to be lost in the street in the crowd like I'm just one girl among many. (Research group member) I chose a bee. I've been so busy this semester, it's been awful, I can't see out of it. I've spent the last few weeks like a bee working hard. It is a lot. I'm not saying I'm fed up, but it would be nice to take a week off. (Research group member) I chose an elephant first because I consider myself a strong person. But sometimes I get tired. I like the herd of penguins, I also like the way penguins live, being able to live in the cold of the north, but more so being in a group. For me the group is very important, the community symbolizes my current state of being. Community is important now and always. (Research group member)

Owl. Knowledge is important. Owls live in the community and have great knowledge. They're nice to me. (Research group member)

I chose a horse, because the horse rushes, and hurries. That's his strength. It's typical for me right now because I feel like I'm stuck with a couple of things in college, and I need to get myself together. (Research group member)

Two deer are fighting. I'm fighting with my semester to be able to do well. And my socks are kittenish and sometimes I just want to sleep all day like a kitten (Research group member)

I chose an ostrich with his head in the sand. There was a death every month and I would mostly just walk away from the world, but there will be events where I "have" to party, but I'd rather hide. (Research group member)

I chose a gorilla. Not so feminine, but it makes me feel stable. I feel like I need to look for support and stability. (Senior researcher)

In addition to ice-breaking and attunement to each other and the topic, these sharings aimed to establish the culture of opening up and expressing ourselves freely, while also introducing ourselves to the group. There were also some sessions specifically dedicated to hard of hearing participants' stories and experiences of social inclusion (or lack of it). Hearing people also shared their personal experiences and we reflected on each other's stories. These deep sharings of difficult, sometimes shameful, painful or comforting, supporting experiences were extremely important in establishing group cohesion and a sense of a safe and healing environment.

At that time, I was a regular lunch guest at this restaurant. I usually ordered a double second course, which cost a little more. I couldn't hear the price, so I gave the waitress more, and waited a bit to see if I'd get change, but then I sat down, and the waitress came after me and brought the change. At that point, I didn't have the courage to ask her what the price was, but I trusted that she would give me the change anyway and I didn't want to inconvenience her. (HH Research group member)

I was having a conversation with my mum on the bus when a little girl asked her mum what was behind my ear and her mum replied that it was a hair clip and they moved away. And everyone stepped back. It was quite a bad experience. (HH Research group member with a cochlear implant)

I found out (having hearing impairment) not long ago, but when I did my family and friends were very empathic. They tried to help me and support me; I didn't feel it was bad for them. One of my very positive surprises is my partner, whom I told when we first met and who was very supportive and positive. It was nice to experience that he was so supportive. (HH Research group member)

Since these story-telling meetings, we have also experienced among the research group members that not only feelings can be shared, but also particular stories about anything good or bad they went through. One member said her friend was very supportive of her coming here because it seemingly benefitted her greatly. Both the opening warm-up and the storytelling circles seem to help members to connect and reduce isolation and see the group as an "*island of calm*" (as one research member put it) that provides a little peace from the outside world, bringing something qualitatively different to life.

4.3.   Creating conditions for research: safe space for senior researchers

The research group and members have also provided a safe space for us, senior researchers, and created the conditions for research. In the beginning, we experienced a lot of uncertainty regarding the motivation and communication within the group, the reception and the appropriateness of the methods we planned. However, meeting by meeting, we felt more and more safe in the group. Over time, we have realized how important it was to build trust and a safe space for us, academic researchers, as well. Our motivation was also fuelled by the active presence of the members.

It is good that we love to work together, this is so inspiring. (Senior researcher)

As I see, the group has been forged together, change is spectacular compared to December. (Senior researcher)

(I feel) A sense of security, making sure that we systematically built a process, slowed down time, and in the end a lot of good things came out of it, in line with the international project. (Senior researcher)

Compared to the situation a year ago, I have a feeling of competence…the amount of feelings we can rely on has increased…It's a good feeling of security that we can build something. (Senior researcher)

We also enjoy working together and have the sense of an intellectual and sensitive team. Participants were always actively contributing to the meetings, and their activity brings content and life into the discussions. In general we, as senior researchers, moderated the events and in all cases, we tried to ensure that the flow of tasks, sessions, and discussions involved everyone and gave them the opportunity to talk and interact. There were also examples of other researchers leading a playful exercise or reporting on previous events, living labs, conferences, and results of an analysis to others. Their activity also gave us a sense of security and our trust in the whole process also grew. We often said: 'We've been held by the team'.

When we started, I wasn't that motivated. It felt like a neutral task at the beginning. Compared to that, there was an organic joyfulness that the members brought, with you, too, that they stay here, they didn't crumble, that you can see their shining faces, that every week I find it so hard to believe that they love it here and want to stay here. They are funny, cheerful. (Senior researcher)

"Safe space" has many interpretations. The concept of safe space is initially arose from the LGBT and feminist movement and referred to physical spaces where like minded people could gather safely without harm or danger (Flensner and Von der Lippe 2019). It has a strong commitment towards marginalized or vulnerable groups, to protect them from threat, hatred and any other violation. Providing safety for participants involved is a fundamental part of research ethics, which is also an integral element of the YouCount project and our case study. However, our experiences took us beyond ethical considerations in a way that providing safe space became a personal commitment for us in forging connections. In the stories that were shared by the HH participants, painful moments of social exclusion, misunderstanding, feelings of shame or loneliness were recalled. These stories - besides the inclusive and supportive ones - reported collective difficulties and traumas of people living with hearing disabilities. We realized that the research process itself might become a corrective "healing" experience to a certain point for those involved, if we were open to process these difficult stories ourselves - or, in other words: if we were willing and empathic to hear these stories fully. These realizations also led us to the concept of trauma-informed approach emerging in research (e.g. Isobel 2021), which we further discuss in the Conclusions.

5.   Power-dynamics

One of the principles of participatory research is to break down imbalances of power (McTaggart 1994). Thus, we were sensitive to the dynamics of power structures from the very beginning. Especially, because we are working with a HH group, who have less power to begin with in the society.

We had the assumption based on our readings about participatory processes that it is a valuable goal to balance – or at least to try to balance – every asymmetry of power. But that assumption changed in several ways during the research process. Based on our phenom-

enological analysis, we identified different sources of explicit or implicit power. Some power-dynamics remained the same but mostly the power-relations were significantly changing throughout the research.

5.1.   Sources of power and power asymmetries

Our senior core group consists of three academic senior researchers (authors of this paper) with academic background and experience with participatory research and qualitative methodology. During our regular senior reflections, we reflect on the effect of this power-source on the research process. We find it hard sometimes to balance between keeping the academic rigor and providing autonomy. For instance, we struggle with the question, how to handle initiatives from the members, which do not fit into the standard rigor of the scientific research process? We also get paid from the project, thus we have external motivation to work in the project as well. It was a huge question whether to channel additional financial resources to the project to provide payment for the other members of the research group.

> It is important that the youngest ones also find their autonomy in the process. Help them to be proactive. It's good practice to talk about how it went after each event, it's automatic and it's very helpful. (Senior researcher)
> We work together in a way that things are rolling forward, but without a leader, somehow the tasks fall into place and cooperation develops. There is no leader, but each piece of work is always pulled by the other. "Like mares taking turns". (Senior researcher)

From the beginning, we highly influenced the agenda of the research. We made several important decisions. For instance, it was our decision to launch the project with only hard-of-hearing youth and no deaf youth at the beginning following several unfruitful attempt to meaningfully connect deaf youth. There was an external barrier, though: the community of deaf youth is very isolated, thus hard to reach. But still, it was our decision to start the process. We also have special influence because we seem like "anointed" representatives of the scientific world, thus our word is rarely questioned in the research group. We try to reflect on that phenomenon and try to avoid having too much influence in the workings of the research group but we cannot exclude this factor all in all.

However, after one year, we experienced a change. Members of the research group started to be proactive. There were examples, when they initiated projects for the group. One example is the paper theater – a special type of storytelling; another example is an Instagram account for the research.

We highly influence the structure and agenda of group meetings. On the one hand, it seems like a control from the senior researchers. But on the other side, this pre-given form is something which can be built upon and provides opportunities to connect. For instance, the members of the research group can count on the biweekly organized meetings even if some of them were away for some months, they knew that they could reconnect to the group and they managed to do so.

In the research group, there are two members with hard of hearing, who are senior but non-academic researchers, thus not in the age group of 15–29. Their experience and perspective sometimes weighs a lot in the balance of the research group. They also have different levels of hard of hearing which results in different opportunities for communication. Many people with hard of hearing use lip-reading as a means for understanding communication. But lipreading is tiring. Thus, after some time, they just fall behind the conversation.

The members of the research group have different availability in terms of time and capacity to work on the project. It makes some processes uneven, some members take part more closely and have more influencing power than others. After some time, we realized that this is not necessarily a problem. We give the structure of the research by organizing the biweekly meetings, thus they have the opportunity to reconnect any time. So they can align their extent of participation in the project with their other areas of life. This gives the project an organic rhythm. But we have to make sure that the reconnecting participants have all the information necessary to understand the current state of the research.

No need to plan at project level, the project plans itself. We should offer interfaces to connect. (Senior researchers)
The challenge is to describe the app usage and methodology with clear communication so that it is clear what needs to be done. (Senior researcher)

5.2.   Learnings about the tyranny of participation and transparency

We experienced during our research the 'tyranny of participation'. Firstly, we considered it important that everyone should be involved in every decision, everyone should take part in every step of the research process and everyone should have every piece of information. But after some time, this anticipation became an oppressive expectation. Expecting from everyone the same level of participation was unrealistic. For instance, – as a theoretical principle – every member of the research group should understand everything in the communication. But in our situation, communication is complicated because of different levels of hearing. During a meeting, if someone was left behind the communication, then we stopped and tried to explain everything just to her/him in detail. But it turned out that this could become oppressive because this way, the person in question might have felt too much unnecessary attention and it turned out that in reality, she/he is satisfied with understanding only the most important part of the communication.

We changed our view about transparency as well. We agree on the value of making the processes transparent and making available every piece of information. However, in some cases we feel that transparency can be too much and can disturb the process. For instance, providing every piece of information can be overwhelming for research participants. Or: how to share the content of the senior reflections? Would the dynamics of the group change if we share with them how we see them as senior researchers?

We are not so transparent yet, because it has just started. But it would be nice if there was a part of it that we didn't share with everyone. […] I think there's room for "intimate" reflection, thanks to the different spaces for evaluation. (Senior researcher)

5.3.   Individual and relational changes influencing power dynamics

We witnessed many individual and relational changes on personal and professional levels not just in us but in the other researchers as well, that might also influence the power dynamics. The members of the research group have different kinds of experience about social science and working with vulnerable groups. However, we witnessed the increase of competency and knowledge among the participants. At the dialogue forums, we often shared academic knowledge, including for example the capability approach of Amartya Sen and Martha

Nussbaum, learning about the methodology of citizen science and participatory researches, as well as qualitative methodological issues such as how to build an interview guide, how to carry out a qualitative interview, and how to analyze those together. Many participants could use the newly learned methods and concepts in their work outside of the research group.

For us, participation [in this research project] is an empowerment itself. (HH Research group member)

We can connect our experience with power with an operational definition of power (Hayward, 2003). 'Power over' means to have the power to exclude others, 'power to' means the capability to decide about actions and carry them out, 'power with' means collective action, 'power within' means personal self-confidence. In terms of 'power over' we realized that we have the power to decide who to involve into the research process but tried to distribute that power. We also had the 'power to' decide about the steps of the research process but it has changed, after some time the members of the group started to use that power as well. We had 'power with' the members from the beginning in terms of collective actions. But after some time, we realized that we do not need to expect the same level of 'power with' from everyone, we only need to establish the opportunities to connect to collective actions. In terms of 'power within', we witnessed many micro-empowerment during the research, where they started to gain new power in their individual lives.

6.   Balancing efficiency and inclusiveness: Rhythm, time, organic development

Self and body-aware communication, creating safe space and searching for balanced power dynamics all have an impact on the *rhythm* of the research both for the shorter and the longer terms. When we aim to create a safe space for sharing and collaboration, we are continuously looking for feedback, ask for assurance and so repeatedly pause the flow of communication. In other cases, when giving a presentation (using a slideshow), the presenter has to establish a specific rhythmical process – changing the slide, waiting for the others to read the slide, commenting/narrating the slide while checking if everyone understood it. The presenter also has to be aware of her body orientation, articulation, speaking speed etc. Timing becomes a powerful tool in the process. If there is not enough time provided for everyone to understand what's been said or presented, it may lead to isolation – which is a frequent experience in their daily life as a basis of exclusion. Time itself therefore becomes an aspect of power: those who can give time, have the power. If someone is asking for more time, it can be seen as an act of (re)gaining power. Consequently, having or providing enough time is a crucial element of inclusion. As one of the HH research group member said: "*Here (in the research group) we finally have time to connect*".
    Apparently exclusion cannot only happen by insulting actions or ignorance but also by being impatient or by hastening communication. To be able to habitually slow down in a demanding and result-oriented academic environment, however, seemed to be challenging. Even if support and flexibility has been ensured by the project consortia, demanding project deadlines, efficiency and the need for demonstration of scientific and social impact put pressure on knowledge producers aka. academics. We faced two conflicting (or seemingly

conflicting) drives: to be efficient and productive in a given time frame for project efficiency and to be slow and inclusive for a valid and legitimate approach (efficiency vs. slowness).

While this dilemma existed and still exists, we also experienced a pattern of organical development throughout the process. It became clear that consistent and continuous (even with lower intensity) contact during the research among the research group members is a fruitful approach and keeps the research at a dynamic pace. Even if there's only a 20 min-s long group discussion or a one-to-one short interaction via Zoom, it provides a safe and reliable interface, where group members can (re-)connect. Our role can be sometimes only about providing platforms for connection and enough time for discussions to emerge. The organic development of the process is a powerful experience. We are gaining a focussed but at the same time relaxed attitude, where pressure on goals is becoming easier and we are just curious about what happens next. This gives a specific, lively rhythm to the process itself – where everything has its own time and we cannot do things if we are not there yet.

Even such half-hour update meetings can work well… They (research group members) also like that it is not drawn out for two hours, but it is such a fast progression. (Senior researcher)
I have this feeling of security, we were making sure that we systematically built a process, slowed down time, and in the end a lot of good things came out, in line with the international project. (Senior researcher)
Consistency and consistent progress are the keys to success. Even if there is a small step, if it is constantly happening, then it is the process itself. This can be maybe an aspect of the female leadership style? Organic development, no pressure to perform. Those who join are welcome, but there are no expectations. (Senior researcher)

7. Lessons learned from the case: insights on inclusiveness in participatory research

During our research process we learnt a lot about the lived experience of the HH people. We realized that the communication needs of hard-of-hearing people are as diverse as the people themselves. Instead of assuming the "right way" to provide accessibility, we have to assess communication needs individually. We learnt from the stories that accessibility is a real challenge in many community buildings, festivals and cultural programs that should be available to them. We learnt a lot about social inclusion issues and challenges. As the research progressed, however, it became clear that us (hearing and HH participants) being in this together is actually a social inclusion process.

Creating trust and a safe space, for example, not only allows the research team to function and conduct research but can also model a social functioning in which hearing and hard-of-hearing participants can connect to each other while remaining autonomous. We acquired more sophisticated and refined knowledge on the drivers of social inclusion through experiential learning. Moreover, we were not only exploring or investigating but also living social inclusion. This led to a transformative change in how we reflected upon "inclusivity" as well.

Our paper presented the outcomes of our experiential learning process. We recognized a heightened awareness in our body communication, posture etc., and acquired an embodied knowledge on how social inclusion manifests in the physical space. Safety turned out as a central aspect of the collaborative set up and connected our process to the trauma-informed approaches. Regardless of the fact that we cannot necessarily say that HH participants had been traumatized (in a clinical sense) by their former experiences, according to our belief the

trauma-informed approach can be a relevant and useful concept in supporting our research. Recurrent experiences of exclusion, oppression and humiliation experienced by people with disabilities may or may not lead to being traumatized, but they certainly lead to a more sensitive and vulnerable exposure to social interactions in general. Trauma-informed approach is an ever expanding concept in social work, care and we further argue that it should be ingrained in qualitative and collaborative research with vulnerable groups. This approach is based on promoting the principles of safety, trustworthiness, collaboration, empowerment and choice (Isobel 2021). If research with vulnerable groups aims to be empowering and emancipatory, the first step is to be considerate to the possible re-traumatization of those involved. Re-traumatization can happen in many ways, in institutions or in personal relationships, for instance, by being treated as a "case" not a person; having no opportunity to give feedback about their experience; not being seen/heard; feeling that trust is violated and so on. As academics, we came to the realization that we needed to understand these aspects more, beyond the research ethics (or as an advancement in ethics) if we aimed to produce legitimate outcomes working with people living with any disabilities or special needs.

A further outcome of our experiential learning process was the trust we gained in the process itself. Our role – as we felt many times – was more of a facilitator, who gives a platform for connection and then sees what happens next. We had a particular experience with managing and relating to time. Even though there was a lot of pressure to proceed, consistency rather than intensity gave momentum to the research dynamics. We experienced a particular kind of "slowness": we had to slow ourselves down in the interactions, discussions and we realized we couldn't rush the progress more than its own rhythm. This self-inflicted slowness came with a lot of recognition, learning and a space for reflection. By this we can relate to the "slow science" concept (Stengers 2018) not as a normative idea, but rather as a practice we found ourselves doing.

Furthermore, we found the feminist approach to ethics, the "The ethics of care" (Gilligan 1982) a profoundly engaging concept in our relational approach to be further explored. In her 2014 paper, Gilligan wrote: "As humans, we are responsive, relational beings, born with a voice and with the desire to live in relationships, along with the capacity to spot false authority". The ethics of care incorporates human relationships and emotions as a fundamental part of ethics and gives priority to the values of trust, solidarity, mutual concern, and empathetic responsiveness, "in practices of care, relationships are cultivated, needs are responded to, and sensitivity is demonstrated". (Held 2006, p, 27.). In this sense "caring" research is a research where priority is given to the quality of relationships, to empathy, relatedness and responsiveness. In our case, presented in the recent paper, these priorities have emerged in an organic way, and our difficulties and joys revolved mostly around them.

8.   Conclusion

During our shared process, our understanding of social inclusion has also changed. According to Yang et al. 2019, social inclusion is a multidimensional "process ensuring that individuals and groups have opportunities and resources necessary to participate fully in economic, social and cultural life and to enjoy the standard of living and well-being that is considered normal in

the society in which they live". In our understanding inclusion has a "directional meaning": A provides opportunity for B to join, that is there is a direction of "providing access" from A to B. In our case, over the project period, an unease emerged in our discussions regarding the use of "social inclusion" as the key concept, along with the use of "vulnerable" and "marginalized". We became sensitized to the paternalistic and stigmatizing connotation of *inclusion.* We felt it less and less that we were "working on the inclusion" of HH members, rather we established and built relationships with them in a delicate manner. We were working on "defragmenting" our community. In other words, the relational aspect of the collaboration (i.e. to connect in a meaningful way) became a decisive element of the whole process. The exploration of these relational aspects is – as the subject of our recent paper – can be considered as the research of the micro-level social inclusion (e.g. Juvonen et al. 2019). As Yang et al. 2019. highlights, promoting social inclusion requires treating the majority and excluded/marginalized groups at the same time, not each of them only, since they live in the same environment. During our research, we inherently realized that we are inter-connected with each other, and the empowerment of "them" is the empowerment of "us", since the web of the group is changing together. Inclusion in this way can be re-framed as a joint and interdependent transformation of all actors involved, where connections are (re-)established and the community is being defragmented.

Our participatory research relies greatly on the participatory action research method. Through our phenomenological inquiry, we have drawn a defining moment/characteristic of participatory action research: the interaction between researchers and research participants. Every stage of participatory action research is a co-creation of different research participants. Thus, inclusive and empowering research that makes participation truly possible requires embedding diversity carefully in the research methodology (Málovics et al. 2020). Following this idea, we formulated our research assumptions (including our thoughts and feelings), ethical principles, and values prior to the research. Our phenomenological perspective, however, emphasizes that beyond and detached from the initial assumptions, experiencing the transformative power of cooperation – and coexistence in the same space – certainly reframes the research process. We naturally modify our initial assumptions through experience, but we also perceive and discover them in reality: what participation means in practice, to what extent our prior knowledge about the social group meets reality, how well our participation process is able to represent differences. Participatory action research, therefore, enables us to look more deeply into the interface between researchers and participants, which positions researchers in one space – not only physically – with research participants. As a consequence, our changes, newly discovered experiences and complexities become part of the research. Recognition and involvement of our story mean that the "I" and ourselves become data as well, questions about ourselves and the research question are interlinked and are part of knowledge creation (Arnold 2011). This contributes to a more horizontal relation and blurred distinction between participants and (academic) researchers in a collaborative relationship and opens the possibility to address sensitive and significant problems together (Bradbury and Reason 2003). (E.g. in our case, what is the form of communication in which diverse participants feel safe).

In our phenomenological inquiry, we have presented our perception and perspective of a collaborative research. Although it was not the primary focus of the research – as participatory action research is designed primarily to promote social change in line with community goals (Reason and Bradbury 2008, MacDonald 2012, Greenwood, 2015)-, we wish that our study can contribute to how social change can be fostered by reflecting on the academic researchers'

perspective, and emphasize that changing ourselves and our research stance and concepts is part of social change.

9.　　Acknowledgement

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Barbara Mihók holds a PhD in Ecology and is also trained as a mental health professional. She worked in inter- and transdisciplinary sustainability research after completing her PhD. Recently her main interest is promoting human well-being in connection with nature, participatory action research and working with vulnerable groups in inclusive research. She is a research fellow at the Environmental Social Science Research Group (Budapest, Hungary) and the University of Szeged, Faculty of Economics And Business Administration Research Centre.

Judit Juhász holds a PhD in economics. She has been involved in participatory action research and university-community engagement initiatives since 2013. Her research interests are human development and well-being, and the nature of a worthy life. She is working with vulnerable groups to promote equality, autonomy and diversity. She is a researcher at the University of Szeged, Faculty of Economics And Business Administration Research Centre.

Judit Gébert holds a PhD in economics but also has a background in philosophy and political science. Her main research interests are intersections of economics and philosophy, especially sustainability, human development and distributional justice. Gébert is also a participatory action researcher working with vulnerable groups. She is a researcher at the University of Szeged, Faculty of Economics And Business Administration Research Centre.

Action Researching for Transformations: Interview with Hilary Bradbury

Hilary Bradbury, Danilo Streck, Miren Larrea

Danilo and Miren:

Thank you, Hilary, for this interview for the readers of the *International Journal of Action Research.* It is a pleasure to have you with us. Let's start, as we always do, giving the reader a perspective on your trajectory. Why and how did you come to AR?

Hilary:

Hola y gracias Danilo! Kaixo, Eskerrik asko, Miren!
Thank you both for the kind invitation.

Danilo and Miren:

What life experiences and authors have been important references in your work? Could you tell us how they have impacted your trajectory?

Hilary:

Early formative experiences include growing up in Dublin. This meant growing up in a deeply religious, post-colonial state. We could compare it to today's Iran. Though we had more rain and better beer! I remember reading Orwell's *Animal Farm* as a kid. It so touched me, I became a vegetarian! My first trip alone was as an exchange student to Germany which I loved. I later applied for university exchange too. I got quite involved in environmentalism as I read all the great German philosophers. I also read deeply in feminism. My first job back in Ireland was working for Amnesty International and teaching English to Spanish kids who kept me on my toes. I was super thrilled to escape to graduate school in the USA. However I was disappointed by the intellectualism. This would become a lifelong tension. I love exciting ideas, am excited by rethinking power – I wrote a thesis on Foucault in graduate school – yet I felt as a scholar I was supposed to ignore real life. So I dropped out of my first PhD program in an attempt to find real life! I moved between extremes, from an eye-opening stint working for a very wealthy industrialist, I went to Japan to study Zen meditation for a year. When I returned to the USA I had the good fortune to find work with Peter Senge at the MIT Center for Organizational Learning. Finally I had an onramp to integrating my passions. I completed a PhD in Organizational Transformation, focusing on the greening of business and leadership for sustainability. From this a successful academic career grew, in which I managed the creative tension of doing scholarly work that is also relevant to life. That remains my passion.

Danilo and Miren:

There are several things you are well known for in the action research community. Let us start talking about the SAGE handbooks. They seem to be a formidable way to get to know action researchers from all around the world with a varied set of ideas and practices. What can you tell us about this experience?

Hilary:

The partnership with Peter Reason on the Handbook remains one of the more positive and productive early partnerships, and a terrific start to learning about many types of action research all over the world. I completed my PhD at the same time; I was action researching with Swedish business leaders in Sweden. Worth mentioning also is that quite a few academic mentors at the time discouraged me from getting involved with action research. They felt it would detract from my career on tenure track. Happily, they were wrong.

In this early editorial work with the Handbook I brought an interest in framing and connecting the different approaches. Peter and I had very few disagreements, though I recall a good one. We disagreed over whether to include a definition of action research and principles for assessing quality in action research. I thought it was necessary. I am happy to see the definition and principles I helped create now used so widely.

Danilo and Miren:

You have long experience with self-inquiry and first-person action research. Why did you make this choice? How do they relate to second or third person forms of action research? What is your experience about the relationship between action researchers with different practices?

Hilary:

My abiding interest in ecological and feminist thinking had me understand that the world is not simply "out there." Instead, how we perceive the world shapes our understanding of reality. And in turn that shapes the actions we take, or do not take. We can call this a constructivist perspective on life and learning. Practically, though, it also implies that we are called to more conscious awareness of the choices we make. To be simple about it, in any interaction I can choose reciprocal versus extractive. The partnership way is the more action researchy way. But I don't think it is the easy choice. Therefore, developing more conscious action requires inquiry. From that a new repertoire for partnership and collaboration becomes possible. This has wide implications. Mother Earth is sending us loud and clear signals that we need to partner in ecological processes and stop our extraction. Obviously there are obstacles – cultural and personal – that make a partnership orientation difficult. "Consciousness raising" helps. In action researching terms, I call for a *praxis of reflexivity with self and one another.* We need a reflexivity that is not just cerebral but can help us meet the emotional complexity of partnership. If we are to come to collaborative action together, having big ideas is not enough. I remain interested in learning and teaching to use power differently. That takes practice. It takes what I now call developmental friends. Action research is such an excellent vehicle for development of self in the context of sustainable development of a collective!

Danilo and Miren:

You are the lead author of a 2019 article entitled "A call to Action Research for Transformations: The times demand it". What do the times demand from action research?

Hilary:

It starts with the words, "Our beautiful Earth is becoming inhospitable to us." To put it simply, the whole paper is a polite demand of educators change-leaders to get serious about the demise of our Mother Earth which is deeply linked to extractive social policies. It lays out how more of us can play a concious role in accepting that we too often continue with processes of knowledge creation that keep us separate from what we ought to care about. I say it is time to think about how to better reconnect our heads, hearts and hands. We cannot get there from there, we get there from here, writes Freire. I feel that so many educational resources are wasted on analysis paralysis that calls people to ignore their own experience and engage in abstractions. I looked for partnership with other authors who care about transformation also beyond the field of action researchers. For example, Karen O'Brien is a Nobel Laureate for IPCC work on climate change. My sense is that it is time to reach out to the sustainability scientists who want to make a difference with their research. So many more scientists can be liberated by action research. I hope the essay helped reach those who are not usually labelled action researchers.

Danilo and Miren:

Recently you published a new book, "How to do Action Research for Transformations at a Time of Eco-social Crisis". Could you tell us what is your core message with the book?

Hilary:

In a way it is the book length version of that 2019 editorial. The foundational idea is that humans can continue to learn and evolve after we grow up physically. I define *learning* as the transformation of experience through reflection AND action, in other words I take a pragmatic or consequentialist approach and see conscious action as what directs learning and evolution. Unfortunately, many of us were never told the key secret, that action *is part of* learning from experience. Too few of us know we can continue to grow and evolve if we cultivate our capacities for partnership through life.

The book makes the case for linking personal development to sustainable development and hence an emphasis on reflexivity. Then it sketches working along a pathway of seven choice points for quality in action research. These start with intention, move through participative process and end with the idea of actioning our work through next groups of stakeholders. Some of the examples are taken from a huge and enduring piece of work I did with the Port of Los Angeles. Some are more recent, with today's work to support the efforts of other action researchers through the Action Research Plus Foundation.

I give lots of examples, big and small, of what a more transformative approach to knowledge creation, i. e., action research for transformations, ART, looks like. I say it is an approach in which we develop ourselves and our world as a response to the eco-social polycrisis around us.

Danilo and Miren:

Let us now focus on AR+. Could you briefly introduce what it is and tell us about your ambitions and hopes with this project?

Hilary:

AR+ is a global community that grew out of the now three Handbooks. It was funded by my royalties, as we needed seed capital for the website and basic administration. The idea was to convene a community space around the authors and readers so more of us, seniors and novices could interact. Then the idea of meetings online took hold. We seemed to attract people interested in the edgier work that includes personal development. We were early adopters of Zoom. I found that very engaging personally. By 2018 or so, I became more focused on AR+ than academia and AR+ is a space that explicitly develops and extends transformative action research, ART. We have, for example, helped develop a tool for self assessment which helps people notice their use of power, feedback and collaboration. And we especially like ambitious action researchers – like the work you do, Miren, in the Basque region, like the work Svante Lifvergren does in Sweden. We have good participation from the Global South too. We have a Gathering in November this year in the Italian Alps, hosted by the Free University of Bolzano. We will see what wants to evolve for us as a community. I hold a vision for linking ambitious action researchers across the globe.

Danilo and Miren:

How would you like your work to have an impact in the multiple crises we are experiencing?

Hilary:

It seems to me we have a choice. We can hide from our eco-social calamities, or grow ourselves by helping transformations happen. I recommend the latter. The bonus is that we feel more alive when we are not pretending there are no calamities. We may also feel more useful when we are making a small difference even with a small community. I certainly doubt that we will reverse climate change in our lifetime. However, we can learn to live better in an unstable world. And in so doing grow ourselves up as human beings. Our default mindset evolved in the Paleolithic era, no wonder we have problems with diversity and future forming! We have to learn to use our godlike technology to create a world that works for all beings. Action research is ideal for that. Happily, I get to see its fruits every day in papers sent for publication to ARJ.

Danilo and Miren:

Considering the previous and other experiences, what would you highlight (positive and/or negative) from your lifelong AR practices?

Hilary:

I often think the key question is why we *don't* succeed in planting and nurturing seeds for real change. As an organizational psychologist by training, I ponder about so many of us who struggle with the destabilization of contemporary life. Its not a stretch to suggest so many people feel traumatized. We see suicide rates climb. Yet our institutions offer defensiveness against innovation. Our universities continue with their 16th Century processes of Ivory Tower. We cannot simply assume that people can learn, much less engage in change work, without healing the growing personal and interpersonal anxiety. Our work needs to be more emotionally attuned, more psychologically sensitive. Maybe then we can add value. We all grew up in some kind of power-over, we might say, supremacist system. In Spain Franco is not a distant memory. For me our theocracy is still an echo. Change work that happens on top of

this trauma is unable to grow. So let us understand that our work is not easy. How can we simply expect that those who have had upper caste status – which includes all men and all of us of European descent – can easily meet the demands for more equitable arrangements. I am more and more interested in what it takes to co-create higher quality relational spaces, with more trust, more fun, more sense of community, as we accomplish good things.

Danilo and Miren:

Considering today's multifaceted crisis (economic, political, cultural, environmental, among others) does action research have a special role? How can action research become (more) relevant?

Hilary:

I ask myself something a little different. When it is good, action research is particularly good for producing transformative change. For example, Gustavsen's work helped change organizational life. We see that continue through organizational learning efforts and Otto Scharmer's work today. Yet action research remains too marginal. Why? The work is hard and requires multiple skills. I see a system of education not fit for purpose. Too many grad students don't even know about action research. All people now need to learn how to mobilize change for their own lives and with others. All students at university ought to learn about action research, and do some small projects to get the hang of it, before they are sent into the world!

I also see the field of action research itself remaining too disorganized and lacking discipline. Perhaps it remains so until there is more support and sponsorship. That said, my insights from adult development have me think that reflexivity is not easy for most adults. We prefer to know and be right, than to learn and muddle along together.

Danilo and Miren:

To close the interview, we always ask interviewees about the *International Journal of Action Research* (IJAR). What do you see? What are your wishes regarding IJAR's future development?

Hilary:

I was just reading IJAR's recent call to work on new forms of capitalism with implications for impact on climate and sustainability. You are noticing the stagnation of global democratization and general dehumanization. Bravo, Brava! The call to work around capitalism seems like a space for beginning to overcome the Global North versus Global South relationship. Certainly the Global South has something to teach us in the north about new experiments with capitalism. I hope to see IJAR fomenting more of a spirit of Global North *with* Global South. I also wonder about the practical issue of accessibility of your articles; the so-called pay wall problem. I understand that journals need to make money and I wonder if there is a way to share, within your constraints, more materials currently locked behind your paywall. Maybe there is a way AR+ can help with some of this too. Let's talk more about what we might accomplish together!

Danilo and Miren:

Thanks very much, Hilary, for taking the time to share your perspective with the readers of IJAR.

Special issue of the International Journal of Action Research

Issue Editors: Olav Eikeland, Oslo Metropolitan University, Norway; Søren Frimann, Aalborg University, Denmark; Lone Hersted, Aalborg University, Denmark

Working with action research for sustainable and regenerative environments, communities, and organizations.

Wicked problems are calling for action

At a global scale, we're dealing with an eco-social crisis where both "eco" and "social" are abbreviations, "eco" for climate, depletion of nature, decimation of species, pollution, sea-level rise, etc., "social" for psychological, interpersonal, political, economic, general power inequalities, social and gender justice etc. We are confronted with "wicked problems" without straightforward solutions to any of the complex problems of our time. The ecological and social challenges are deeply intertwined, and there is a need for research that conceptualizes ideas, projects, and initiatives for sustainability, which integrate ecological and social perspectives.

Environmental destruction and the exploration of natural resources are happening in systematic ways, e. g. through the logging of the forests, exaggerated exploitation of the soil, overfishing etc. Our environment is suffering and characterized by pollution, CO_2-emission, global warming, forest fires, floods, drought, melting ice, plastic in the oceans, loss of biodiversity etc. If we continue this track, the collapse of ecosystems will be followed by the collapse of our societies characterized by rising inequality and human suffering, which will result in even more conflicts, wars and increasing flows of refugees.

Not only are our ecosystems suffering. We are also dealing with suffering at the social level where people experience an increasing social inequality and dissatisfaction. The neoliberalist economical model entailing a capitalist mode of production and primitive accumulation (Chertkovskaya and Paulsson, 2021), which is based on untamed economic growth and short-term profit, is creating even more inequality in the world and puts enormous pressure on people. Many people feel exploited at their workplace, which is characterized by a high work pace and a performance race, often leading to stress, burn-out and depression. Many employees experience that there is not enough time left to take care of their family members and friends – or even themselves. The time for engaging in relationships with other people is scarce, and not only the elder generation, but also children and young people, suffer to an increasing extent, from alienation and loneliness.

As Habermas (1987) pointed out, our *lifeworld* has been colonized by the *systems world*, and Hartmut Rosa, uses the terms *social acceleration* and *dynamic stabilization* to characterize the conditions for living and working in our time (Rosa 2019). Rosa points out that social acceleration is not only driven by the desire for growth, but to a high extent also by the

fear of being excluded from the labor market and being marginalized in society. So how can we create workplaces, organizations, and educational institutions, which are sustainable and inclusive, not only in relation to the physical environment, but also at a social level?

The crises are all deeply connected and therefore we need to rethink the ways in which we relate to each other, to nature, to the ecologies in which we're embedded, and the ways in which we organize our ways of living, producing, and consuming etc. We need to understand that everything is interrelated and search for new ways of relating to our surroundings.

From a perspective of interrelatedness, how can we create and reinvent human practices towards more regenerative and sustainable ways of living, organizing, producing, and consuming in order to preserve and regenerate our nature, ecosystems, and communities? And how do we as action researchers engage with other researchers, practitioners, citizens, influencers, and decision makers in order to create and put into practice sustainable solutions to these complex problems and create eco-social change?

Movements and tendencies

In recent years we see an increasing tendency of researchers working together with climate activists, practitioners, and vice versa. The latest example is the new book edited by Greta Thunberg: "The Climate Book" where the climate activist Greta Thunberg has gathered more than 100 researchers from different fields such as history, philosophy, and psychology to oceanography, geophysics, and meteorology to demonstrate scientifically how we can change the climate crisis in the attempts to save the future of our planet.

In this special issue we invite contributions that explore how action research might offer a practice for research and change, where action researchers take the role as partners together with practitioners in creating positive social and environmental change through local action and community-based initiatives. We think that action research can contribute, not only to critical reflexivity, multi-disciplinarity, and the inclusion of people's voice in addressing both global and local challenges, but also to concrete action for change.

To what extent and how can action research contribute to the needed eco-social transformation?

Creating change for more sustainable and regenerative ways of living, organizing, producing, and consuming is not an easy task. With this call for papers, we are interested in figuring out whether and how action research can further eco-social change for the improvement of our environment and society. As mentioned above, there is a need for action research, which conceptualizes ideas, projects, and initiatives for sustainability, through the integration of both ecological and social perspectives. Therefore, we call for papers, which deal with complex eco-social problems that both analyze and discuss practices of action research based on involvement, co-creation of knowing and the transformation of our society towards a more sustainable and regenerative future *together* with citizens and practitioners. At the same time this call also invites for more philosophical papers concerning these issues. The overall themes could for instance be:

- Papers concerning action research projects for eco-social transformation based on co-creation between different stakeholders, e.g., both from the public and private sector, citizens, volunteers, activists etc.
- Papers concerning action research for social sustainability in workplaces, in local communities, neighborhoods or larger societal units.
- Papers concerning the active involvement of children or young people in action research towards more sustainable practices.
- Action research-based initiatives for the inclusion of marginalized citizens in the eco-social transformation where these citizens are given a strong voice.
- Papers exploring action research-based initiatives working for alternatives to the paradigm of growth and consumption, profit-oriented production, and competition.
- Action research for the development of more sustainable and regenerative ways of leading and organizing.
- Eco-feminist approaches to action research for eco-social transition.
- Action research projects involving indigenous knowledge and 'knowing'.
- Action research projects, which work across various, often disconnected contexts, for instance urban and rural contexts and their relationship.
- Philosophical papers that discuss some of these overall issues and contribute to new thoughts and insights in relation to action research for eco-social transformation. What does it mean for social relations and systems to be sustainable?

Literature for inspiration

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Deadlines

Submission of extended abstract: November 15, 2023. Extended abstract: Maximum 1200 words (Including an extended summary, outlining for the content in each section).
Acceptance or rejection of extended abstract: January 15, 2024.
Submission of full article: July 1, 2024.
Review process: July-September, 2024.
Review will be sent to the authors: October 1, 2024.
Final article submitted: January 15, 2025
Expected publication: April 2025

Full article length: 6000–8000 words.

All communication, submission of abstracts, drafts and articles should go to the issue editors.
Søren Frimann: frimann@ikl.aau.dk
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Marianne Kristiansen,
Jørgen Bloch-Poulsen

Action Research in Organizations

Participation in Change Processes

Who decides to initiate change processes in organizations? Who sets the goals? What does it mean for employees to participate in change processes? The book examines organizational change processes based on collaboration between employers, employees and action researchers in Europe and the U.S. in the later part of the 20th century. The authors offer important insights into participation and change in organizations for researchers and practitioners by identifying dilemmas and paradoxes, conflicting interests and exercising of power.

The authors:

Marianne Kristiansen, Ph.d., professor emerita at Aalborg University/Copenhagen, Denmark

Jørgen Bloch-Poulsen, Ph.d., senior lecturer at Copenhagen University, Denmark

Elina Fonsén et al. (eds.)

Early Childhood Education Leadership in Times of Crisis

International Studies During the COVID-19 Pandemic

The COVID-19 pandemic has dramatically affected all aspects of professional and private life worldwide, including the field of early childhood education and care (ECE). This volume sheds light on leadership in ECE: How did leaders experience the challenges they were facing and what coping strategies did they apply in order to deal with the changes in everyday life and practices in ECE centres? Authors from twelve countries present empirical findings gaining information on different crisis management mechanisms in ECE systems around the world.

The editors:

Elina Fonsén, University of Jyväskylä, Finland

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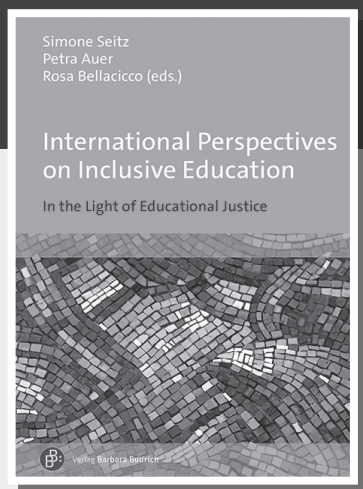
Simone Seitz, Petra Auer, Rosa Bellacicco (eds.)

International Perspectives on Inclusive Education

In the Light of Educational Justice

International developments and impulses call for the equitable and inclusive design of education systems. This book takes this up and focuses on the often blurred relationship between inclusive education and educational equity. By compiling current research results and theoretical contributions from several European countries on the topic, the authors create an overarching framework for discussion.

The editors:

Simone Seitz, Free University of Bozen-Bolzano

Rosa Bellacicco, University of Turin and Free University of Bozen-Bolzano

Petra Auer, Free University of Bozen-Bolzano

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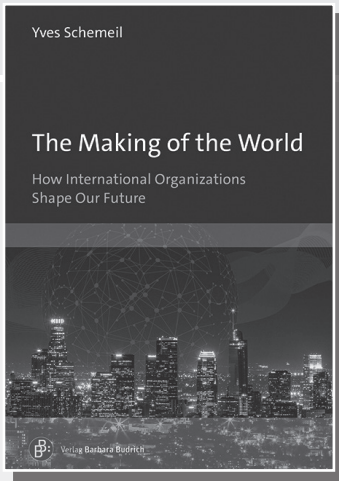
Yves Schemeil

The Making of the World

How International Organizations
Shape Our Future

International Organizations (IOs) were designed to provide global public goods, among which security for all, trade for the richest, and development for the poorest. Their very existence is now a promise of success for the co-operative turn in international relations. Although the IO network was once created by established powers, rising states can hardly resist the massive production of norms that their governments can be reluctant to respect without being able to discard them. IOs are omnipresent, and exert great influence on the world as we know it. However, rulers and ruled are hardly aware of such compelling and snowballing processes. Yves Schemeil uses his in-depth knowledge of IOs to analyze their current impact on international relations, on world politics, and their potential of shaping the global future.