A Nordic perspective on the Cultural and the Activity Approach in Theory and Practice

Hans Knutagård, Britt Krantz och Marie Jedemark (editors)
A Nordic perspective  
on the Cultural and the Activity approach in Theory and Practice

This book contains papers and keynotes presented at the Nordic ISCAR 2013: A Nordic perspective on the Cultural and the Activity approach in Theory and Practice.

The Sixth Nordic Conference on Cultural and Activity Research was held in 12-14 June 2013 at Kristianstad University, Sweden.

Hans Knutagård, Britt Krantz och Marie Jedemark (editors)
A Nordic perspective
on the Cultural and the Activity approach
in Theory and Practice

Hans Knutagård, Britt Krantz
och Marie Jedemark (editors)

Kristianstad University Press
Table of contents

_Hans Knutagård, Britt Krantz, Marie Jedemark_

Foreword 5

Authors 7

A Nordic perspective in design, implementation, and use of new technology 9
_Karen, E Andreasen_

Video mediated teaching and space for learning at General Adult Education in peripheral regions of Denmark 11

A Nordic perspective in educational practice 19
_Karen, E Andreasen_

Standardized testing, pupil formation of identity and processes of in- and exclusion in school classes 21

_Inger Eriksson_

Designing teaching-learning practices using activity theory as a guiding tool – examples from teacher-researcher R&D projects 27

_Carolina Picchetti Nascimento_

Some Methodological considerations for working with theoretical concepts in educational research 37

_Monica Lemos_

Collective Concept Formation of Educational Management 47

A Nordic perspective in work practice 57
_Ulla Ryynänen, Merja Helle, Maija Töyry_

To Change or Not to Change? Dilemmas in Graphic Designer’s Work 59

_Marta Mendonça, Oleg Popov_

A comparative analysis of university pedagogical centres’activities in Mozambique and Sweden 65
Anna-Lena Kurki, Seppo Tuomivaara
The emerging object of municipal home care – collaborative innovation as a potential for expansion 75

John Bertelsen
Not wanted in Denmark – deported to America 81

A Nordic perspective in theoretical analysis and methodological 89

Riikka Ruotsala, Marika Schaupp, Hanna Uusitalo
Colliding concepts of activity: How to make sense of production supervisors’ changing work 91

Thomas Hansson
Mediating acts and systemic performance 95

Lars Bang Jensen
Capital v.2.0- an appropriation of the Bourdieuan concept of Capital to activity theory 103

Theodor Enerstvedt
Some fundamental theoretical-methodological problems in the theory of activity 109

Valerie Farnsworth
Locating the spatial in the activity system: An inquiry into place and young people’s imagined futures 121
Foreword

The International Society for Cultural and Activity Research (ISCAR) is a scientific association that aims at developing multidisciplinary theoretical and empirical research on societal, cultural and historical dimensions of human practices, and promoting mutual scientific communication and research cooperation among its members. ISCAR supports the organization of a triennial international Congress, to be held in Sydney, Australia in 2014. Nordic conferences ensue every third year and have taken place in Denmark, Norway, and most recently in Sweden (2013).

This volume of the Nordic ISCAR 2013: A Nordic perspective on the Cultural and the Activity approach in Theory and Practice contains texts of the presented papers and keynotes. The Sixth Nordic Conference on Cultural and Activity Research was held 12-14 June 2013 at Kristianstad University, Sweden.

The Nordic ISCAR 2013 conference attracted more than 90 participants, from eleven countries. Beyond the five Nordic countries of Sweden, Denmark, Norway, Iceland and Finland, Kristianstad University hosted representatives from Japan, USA, Mozambique, Brazil, Russia and England.

Included in among more than the 70 conference presentations that represented several disciplines revolving around four main themes: 1) design, implementation and use of new technology, 2) educational practice, 3) work practice and 4) theoretical analysis and methodological considerations, were the heavily attended keynote presentations. The keynote speakers at the conference were Professor Regi Theodor Enerstvedt, University of Oslo, Dr. Hanna Toivainen, University of Helsinki, Professor Mariane Hedegaard, University of Copenhagen and Professor Inger Eriksson, Stockholm University. This proceeding contains fourteen inspiring papers, including the keynote contributions.

We want to thank the Kristianstad University, especially the Vice-Chancellor Dr. Sanimir Resic for his support for this conference, which was a part of promoting the international work of the University. Thanks to all colleagues, students and all conference participants who helped make the 2013 ISCAR Conference a success.

Hans Knutagård, Britt Krantz and Marie Jedemark
Kristianstad December 2013
Nordic ISCAR organizing committee
Authors

Andreasen, E Karen Postdoc/Assistant professor, Aalborg University, Denmark
Bang Jensen, Lars PhD Student, Ung-Til-Ung Projektet, Institut for Laering og Filosofi, Aalborg University, Denmark
Bertelsen, John Cand.paed, Den Sociale Virksomhed Guldborgsund, Denmark
Enerstvedt, Theodor Regi Professor emeritus, University of Oslo, Norway
Eriksson, Inger Professor, Stockholms University, Sweden
Farnsworth, Valerie Dr. University of Leeds, England
Hansson, Thomas Theacher, Blekinge Tekniska Högskola, Karlskrona, Sweden
Helle, Merja Dr., Head of Research
Kurki, Anna-Leena Researcher, Finnish Institute of Occupational Health, Finland
Lemos, Monica Center for Research on Activity Development and Learning, University of Helsinki, Finland
Mendoca, Marta PhD Student Eduardo Mondlane University, Mozambique
Picchetti Nascimento, Carolina PhD student, University of São Paulo/Av.da Universidade, Cidade Universitária-São Paulo/SP , Brazil
Popov, Oleg Associate Professor, Department of Science and Mathematics Education, Umeå University, Sweden
Ruotsala, Riikka Researcher, Finnish Institute of Occupational Health, Finland
Ryynänen, Ulla Doctoral candidate, University of Helsinki, Finland
Schaupp, Marika Finnish Institute of Occupational Health, Finland
Tuomivaara, Seppo Specialized Researcher, Finnish Institute of Occupational Health, Finland
Töyry, Maija Dr., Professor
Uusitalo, Hanna Finnish Institute of Occupational Health, Finland
A Nordic perspective in design, implementation, and use of new technology
Video mediated teaching and space for learning at General Adult Education in peripheral regions of Denmark

Introduction

This paper present and discuss results from the dialogue research following a two year innovation project experimenting with video mediated teaching at General Adult Education Centre’s in peripheral regions of Denmark. The General Adult Education (AVU) is a programme for adults to study general school subjects as single courses at a level corresponding to 8th, 9th or 10th grade in Danish primary school. Course participants who apply for these subjects have either not completed lower and secondary primary school with the exam in these subjects, would like to improve their results or just attend the course subject purely out of interest. The General Adult Education (AVU) can be seen as a programme for course participants, the majority of which have had difficulties in attending lower secondary and primary school (Danmarks Evalueringsinstitut, 2011; Katznelson, 2010; Pless & Hansen, 2010). For course participants who live in areas of the country where it can be difficult to get sufficient course participants in order to create groups in specific subjects, parallel teaching based on the video media would make the teaching of two groups possible. Experiments with this have been conducted in several locations in the country (Andreasen & Hviid, 2011). However, this type of teaching comes with a number of challenges as education programmes for precisely this group of course participants. This is about young people who, in many cases, have a great need for professional or social support and who often have low self-esteem regarding their own resources in relation to school (Katznelson, 2010; Katznelson, 2009). They also have a number of bad experiences in relation to feeling accepted in these contexts.

Video mediated teaching and space for learning and participation

Together, the physical and social frameworks for learning activities can be termed as space for learning. The physical space, so to speak, sets the frameworks for how social interactions could unfold and thus be of pivotal importance to the opportunities for participation (Jong, 2005. It opens opportunities, while at the same time sets limitations and generally influences our experience of, approach to and understanding of the teaching. While the physical space
sets the frameworks for opportunities for expression, the teaching and didactics reflect different approaches to occupying these spaces; different ways to make use of the material frameworks through activities that provide possibilities for interactions and social collaboration. In the following, I will respond to these two dimensions.

Modern didactics is based on constructivist approaches to learning and the learning process and simultaneously points out the importance of the learning community in the learning processes, that learning presupposes active participation in learning activities in interaction with others (E.g. Biesta, 2012, p. 27ff). In this way, parallel teaching faces requirements from several sides, by having to match the requirements of modern didactics and teaching, and by having to adapt to the frameworks in which parallel teaching takes place (Christiansen & Gynther, 2010; Christensen & Hansen, 2010).

In his theory on learning in communities of practice, Etienne Wenger discusses how the different communities to which we as people belong, form the framework for learning and the learning process (Wenger 2006a; Wenger 2004). In these social communities we belong to, he emphasises that this is what gives the activities meaning and which, in various ways depending on our affiliation and ways in which we participate in the community, give access to learning. Wenger’s approach to the understanding of learning and the learning process can thus be placed within socio-cultural theoretical approaches.

Wenger defines communities of practice as “groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly” (Wenger 2006b, p.1; Wenger, 2001, p. 1). Learning consequently depends on our ways of participating and options to participate and be part of different forms of interaction that can be linguistic (discursive) as well as physical forms. The learning that takes place can include a more socially oriented form for learning – for example, learning as the forming of identities and self-understanding – and learning of a more academically oriented character in the form of academic knowledge. These two forms of learning must be seen as mutually connected, like each other’s prerequisites (Wenger, 2004). At the same time, it must be seen as connected with self-understanding and identities, which again can play a part as to the ways in which we participate in interactions and our sense of belonging to communities.

In General Adult Education (AVU) programmes, which stretch over a longer period, the distribution of roles and positions may vary and the same course participant could, over time, take on many different positions depending on which types of challenges and tasks that the group or team is actually working on and faces in the work process (Gjosund & Huseby, 2010, p. 51). The higher the degree the individual pupil can actively participate in the teaching activities, the better the conditions are for academic learning. This means that the higher degree to which participants can take on different forms of active roles, the better this is from a learning perspective.
The empirical study

Empirical data is provided with qualitative methods and inspired by ethnographical approaches. The ethnographical research aims towards the understanding of the processes that take place between people in association with different types of activities (Madsen, 2003, p. 22; Walford, 2008). The utilised empirical methods in this project include document studies, observations, interviews and qualitative interviews with course participants, teachers and project managers. The course participant interviews included individual as well as group interviews. A qualitative questionnaire survey has also been conducted. I have followed the project from spring 2011 to summer 2012. Observations have been conducted on three different parallel groups in total where teams both near and far have been visited. Observations and interviews have been conducted with two further groups where the group in the near end have been observed, since the team in the far end was discontinued before I managed to conduct observations. Individual qualitative interviews have been conducted with ten course participants distributed between the various groups and a group interview with five course participants from a single group. Individual qualitative interviews have been conducted with six teachers as well as with the project manager. Interviews with, among others, a careers advisor have also been conducted.

Three teaching situations

Didactically, one can differentiate between different types of teaching situations: The individualised teaching, plenum teaching, and the cooperative learning in larger or smaller groups as well as project work (Meyer, 2005 p. 79). These are situations that can be recognised from all teaching and each of which hold their potential and difficulties. The analysis focuses on these types of teaching situations as contexts for participation, academic learning and identity development. Their options and limitations as far as active participation is concerned, as well as which problems are reflected in them, in relation to social interaction and experiences of relevance to the development of academic oriented knowledge and identity, are discussed.

Plenum teaching has apparently both its advantages and disadvantages in relation to supporting active participation (Andreasen, 2012). There is the option for students to “hide” and thus not actively participate, but on the other hand also to develop academically oriented knowledge by observing and listening to discussions. The teacher has great influence on who is heard and who is not. Academically weaker course participants can avoid making this visible and, in doing so, possibly have their identity and self-image confirmed. Conversely, the taking on of a more passive role seems to have a confirming effect on this, while the opportunities to learn through active participation are reduced.

Collaborative activities and project work as methods can fundamentally give many course participants the opportunity to contribute and participate actively (Ibid.). In the parallel teaching, the work in groups can have a lot to contribute as an activity that can
support the development of academically oriented knowledge. This is reflected in the course participants’ descriptions of how this is linked partly to experiencing oneself as part of a group where one is recognised and one’s knowledge is acknowledged, and partly the academic side which is connected to these processes. Group cooperation across localities is apparently a little more complicated because the technical can affect the communication negatively. One female participant explains: “In group work it is difficult, because it is difficult to get through to the guy on the other end” (Nadia, course participant, 20-years old).

*Individualised teaching* can hold special problems when one interacts by using video and since a course participant is in the distant end and the teacher is in the near end. The problems become evident when the guidance has to take place in a remote location where the teacher and course participant are situated in each their locality. This exposes course participants who want to ask questions but have difficulties of various kinds with strong exposure, as all course participants can follow the guidance dialogues on a large screen which is experienced as a form of display of one’s problems in an uncomfortable manner. The course participants tell about this: “I don’t know if I’d say it was embarrassing, but it is unpleasant when you know that everyone is hearing it” (Ingrid, course participant, 23-years old).

**Concluding considerations**

The parallel video mediated teaching is generally a form of teaching that places great demands on both participants and teachers. In the teaching itself, the teacher must be able to keep updated in relation to two locations at the same time, relate to everyone’s needs, ensure that students can participate with questions and contribute to discussions whether they are in the near or remote location, ensure that teaching materials are accessible at both locations, etc. The students in the remote end must be able to work relatively independently in many situations. They must be energetic and clearly make themselves heard or demand attention when they have questions. Due to the technology, students must adapt to audio limitations and problems, just as they need to be very disciplined when there are joint discussions so that everyone has the opportunity to contribute regardless of which classroom they are in.

To some extent, the form can seem to pave the way for plenum teaching with strong learning control, but this is strongly affected by the disadvantages of the technology at the same time. The same applies to individual teaching. When course participants are in the remote location, situations can be created in which the students feel that possible academic weaknesses are put on display in an undesirable way. This can contribute to the forming of identity and positioning in the community in negative ways. Collaborative activities are, to a certain extent, thought to be free of these problems that relate to the limitations and frameworks of the technology and could also have potential in the form of being able to support the establishment of social relationships and community in the groups.

Video mediated teaching can contribute to increasing the teaching programmes offered in peripheral regions. However, some problems are associated with it when related to the participant’s academic knowledge, resources and experiences. If this type
of teaching is to function as a positive programme for young people who study primary school final subjects, many factors need to be developed in order to match their resources and needs. Results from the project confirm that the didactic of the video mediated teaching has to be renewed as pointed to by to other researchers in this field (Gynther, 2009). Here, a number of points can be summarised where there is a need for innovation in parallel teaching of the future:

- The layout and architecture of the spaces must be re-thought; an architecture that breaks with the dominating aspects of the traditional classroom must be developed. The opportunity for cooperation and discussions in teams must be encompassed here as well as the possibility of not being exposed to an entire group when one needs help from the teacher or needs a personal conversation.
- The technology must be user-friendly to a marked degree so that time spent on switching on or adapting the systems is technically limited to the least possible.
- Didactically, importance should be placed on collaborative working methods, on learning in cooperation relationships.
- There must be specific focus on course participants and teachers re-thinking their student-teacher roles On the one hand, the course participants can be involved and understand themselves as “didactic designers”, in the sense that to a certain extent, they organise their own learning processes as formulated in relation to what is sometimes called “didactics 2.0” On the other hand, teachers must actively relate to developing the learning potential and the didactics in the new space for learning.

References

Katznelson, Noemi m.fl. (2010): Vejen mod de 95% (del II). En erfaringopsamling fra projektet Ungdomssuddannelsen til alle, Kommuneforlaget
Katznelson, Noemi m.fl. (2009): Vejen mod de 95% (del I). En erfaringopsamling fra projektet

15
Ungdomsuddannelse til alle, Kommuneforlaget.
A Nordic perspective in educational practice
Standardized testing, pupil formation of identity and processes of in- and exclusion in school classes

Discussion and presentation of some results from a two year ethnographical study of the implementation of national testing in Denmark

Introduction

This paper discusses the influence of assessment on pupil formation of identity in school classes. The question at focus is how assessments, specifically of a summative character, influences social processes in groups such as a school class and the role of this in pupils formation of identities. The discussion is based on the results from a long-term empirical study of the implementation of national standardised testing in Danish compulsory school. Three Danish school classes were followed from the end of year 5 where pupils are 10-11 years old till the end of year 7, where pupils are app. 12-13 years old.

In 2005 the Danish government of the time decided to introduce standardised test for mandatory use in compulsory school. After having developed and tried out the test which include test in different academic skills, for some years national standardised and mandatory testing was fully implemented in 2010. In spring 2010 all Danish school classes in year 5 and 7 was tested nationally for the first time. This situation formed a unique situation making it possible to make research on the impact of such testing on social processes in school classes. Getting insight into how and by which processes such kind of assessment affect pedagogic practise in school classes and in- and exclusion of pupils, is relevant since assessment play an important role in such processes (McDermott & Varenne, 1995; Reay, 2006). Such influence are reflected in and depending on what can be understood as local test practice, referring to local discourses and ways of using test in specific school contexts.

Assessments tend strongly to affect and shape the pedagogic practises of which they are a part. Thus a relevant question is, how and to which extent such standardised testing seems to affect pedagogical practise in comprehensive schools and classrooms. The specific situation made it possible to study the development of teacher test practise in accordance to the use of standardised national testing. If an important argument for the use of such kinds of testing is, that it should support pupils benefit from activities at school and thereby also processes of inclusion in school and society, a key question in such a discussion is, if the developed test
practises does in fact seem to do that. Standardised testing is a part of pedagogical practice in comprehensive school in all Nordic countries and thus makes the study relevant to Nordic educational research.

National and mandatory standardised assessment is common in basic school in countries all over the world. The implementation of national standardized testing has manifested itself as a trend in educational policy recent years, but as described beneath it is a new practice in Danish schools and educational policy. Politically the argumentation for such practice is that it is meant to support pupil academic learning (Regeringen, 2013). It was fully implemented in Danish compulsory school 2010, and in Norway 2004. In Sweden it has been a well-established practice for several years, and political initiatives concerning school seem to emphasize such practice.

Assessment has profound impact on processes of marginalization and in- and exclusion in school (McDermott & Varenne, 1995). It thus makes it relevant to make research on how this new practice influences such processes. Based on results from a two year study of the implementation of national standardized testing in Denmark in three school classes and drawing on the theory of Etienne Wenger (2004) about communities of practice this paper will discuss the role of such testing in pupil formation of identities and in processes of in- and exclusion. Results are relevant in a Nordic perspective as compulsory school in the Nordic countries is characterized by same developments within the use of such technologies.

Theoretical perspectives on learning and the formation of identity

The different communities to which pupils belong form important frameworks or contexts for their learning – both social and academic - and for the process of learning in general. Etienne Wenger discusses such questions in his theory on learning in communities of practice which thus reflects a socio-cultural theoretical approach to learning (Wenger, 2004). Wenger emphasise that our belonging to such communities add meaning to the activities we are engaged in. He also points to that learning and the process of learning is very much depending on the way we belong and the ways we participate in different activities (Wenger 2006a). We belong to different communities in different ways, and might participate from different positions so to say, positions which frame and influence our participation by opening or limiting opportunities of active engagement (Wenger 2004). School classes, as well as any other social group, represent social communities and are as such characterised by different kinds of roles, positions and hierarchies and by pupils and teachers discourses about activities of school, pupils competencies etc. From such reasons pupils experience based on their interactions in school form a significant context for the formation of their identities, their understandings of themselves, their potentials and opportunities in life (Arnot & Reay 2004; Bernstein 1997; Bernstein 2000). A community of practice is defined by Wenger as “groups of people who share a concern or a passion for something they do and learn how to
do it better as they interact regularly” (Wenger 2006b, p.1; Wenger, 2001, p. 1). The groups of participants and the groups in which they work together around the solving of tasks in connection with the teaching can, consequently, be perceived as communities of practice in Wenger’s understanding. Wenger describes the community of practice as a framework for, and in itself a result of, learning processes: “A community of practice can be viewed as a social learning system. Arising out of learning, it exhibits many characteristics of systems more generally: emergent structure, complex relationships, self-organization, dynamic boundaries, ongoing negotiation of identity and cultural meaning, to mention a few” (Wenger, 2001, p. 1).

The opportunity of learning as well as what is learned thus depends on our opportunities of taking part of different sorts of interaction, being it linguistic or more physical. Learning can be both of an academic and a social character. Of such social forms of learning could be mentioned the forming of identities - the learning that affects our understanding of ourselves, who we are and our academic potentials and opportunities - and the processes enabling this depends on the way we participate and our opportunities of participating. The two forms of learning, the social and the academic, are connected and influencing each other. For instance our identities, the way we understand ourselves, play an important role as to our feeling of belonging and thus to the way we tend to participate in activities in different situations, the way we interact with other people (Wenger, 2004).

Wenger describe the context for learning further and here points the role of reification and the use of different kinds of artifacts by describing how we “produce physical and conceptual artifacts — words, tools, concepts, methods, stories, documents, links to resources, and other forms of reification — that reflect our shared experience and around which we organize our participation (Wenger, 2009, p. 1)”. Participation and reification are interrelated and creates as social history, he describe, a history describing a “regime of competence,” a set of criteria and expectations by which they recognize membership. This competence includes:

- Understanding what matters, what the enterprise of the community is, and how it gives rise to a perspective on the world
- Being able (and allowed) to engage productively with others in the community
- Using appropriately the repertoire of resources that the community has accumulated through its history of learning” (Wenger, 2009, p. 2)

These perspectives seems very relevant in the discussions of the forming of identities, of position and roles in the communities and thus to processes of in- and exclusion.

The research project

The empirical study is comparative focussing on three Danish school classes situated at schools in three socioeconomically different neighbourhoods. The school classes have been followed from form 5 (spring 2010) till the end of form 7 (spring 2012). It has an ethnographic design and includes different kinds of empirical data (Hammersley, 2007;
Walford, 2008a). The empirical data include observations from every-day life in classrooms, for instance from different kinds of test situations and other kinds of assessments, teaching, pupil-teacher conversations, and other common school activities. Results from tests and assessments, interviews with pupil’s, teachers, head of schools etc. are also a part of the data.

**Methodology.** The empirical methods of the project have their origin in postmodern and constructivist understandings of knowledge. Within such paradigm knowledge are to be understood as a product of individual constructions and interpretations, something that can be an object of discussions. Also knowledge should be understood as closely related to specific contexts. Such conditions are reflected in a qualitative approach, the ethnographical, which makes it possible to make research on how individuals experience, interpret and understand the phenomenon of focus in such contexts. Ethnography includes a variety of qualitative methods in relation to field studies. This specific study includes data from interviews, observations and different kinds of documentary. To this comes data of a more quantitative character – such as test scores – but being used with a qualitative approach, for instance in discussions of how such data are created, how they can be understood and how they are being used in different situations and contexts.

**General design.** The research project had a longitudinal design and included field work through two years in three school classes at three different Danish municipal schools. The longitudinal design made studies of developments of pupil and teachers understandings and use of the test possible as well as of pupil understandings of themselves, teaching, and general activities of school. Interviews are conducted with pupils (three times, one time each school year), teacher (once a year), different experts at the school for instance in reading with the head of schools. Through the two years I made observations in the school classes regularly in common teaching – firstly in subjects Danish and mathematics – and in relation to more special activities such as the week for the project assignment, during an project activity in the sciences, when doing the national standardized test and some other assessments, at pupil-teacher conversations etc. All names and places are anonymised.

**The three schools and selected school classes.** Three criterions were used for the selection of schools (Walford, 2008b). The kind of residential area in which they were situated should differ, to support differences according to the socioeconomic backgrounds of the pupil population of the schools. The three schools – called the Suburb School, The Urban School and the City School - are situated in relation to cities of different size, the three cities had populations between 5000 and 55.000. Each school class should reflect diversity according to the pupils according to gender, ethnicity, social backgrounds, and academic skills of the pupils.

**Summary of results from the analysis and concluding remarks**

The analysis has its focus on the influence of testing on pupil discourse about personnel abilities and resources, and on how testing by this play a role in pupil formation of identity and understanding of activities of school. It shows that is plays an important role for pupils
at this early stage of life. By introducing the use of numbers and categories the national standardized test give pupils the opportunity to compare themselves to other pupils and thus to generate hierarchies and positions in class. Further results are understood by the pupils with a reference to discursive categories referring for instance to opportunities in life – such as being rich, poor, being a success and similar – and to certain jobs and educations (low or high status jobs, academic careers, unemployment etc.).

The practice which the test are a part of are framed by different kinds of legislations stating for instance, that test results should be reported in the pupils plan one a year along with results from other kinds of assessments in different subjects. The dialogue which is framed by the pupil plan is reflected in teachers and pupil discourses about different themes such as achievement level in different subjects. For instance pupils began, after the introduction of the national test, to describe their competencies as being average, medium, above or below average and similar terms, which are terms being used in relation to the pupil plan and the categories used in it.

By referring to hierarchies and positions such discourses will play an important role in pupils to pupils perceptions of their resources and their forming of identity as well as in teachers understandings of pupils potentials and abilities. By doing this it will influence processes of marginalization, in- and exclusion of pupils at school and play an important and problematic role according to pupil engagement in activities of school and in a future perspective also in their further educational career and educational choices.

References
Taylor & Francis.


Dear colleagues

First of all I would like say that it is a great honour for me to have been asked to give this speech. I should perhaps motivate my being here for those of you who do not know me, since this room is filled with better-known people in relation to the Nordic ISCAR Society, but I will not. Some of you know me quite well, while others do not know me at all. But, as I have come to realise, in our society one of our core ideas is the importance of multi-voicedness, including lesser-known voices. My voice here today will address issues concerning teachers’ and researchers’ efforts to expand student opportunities to learn a specific content using activity theory as a tool in didactic task design. In doing so, and in relation to the theme of the conference: A Nordic Perspective on the Cultural and the Activity Approach in Theory and Practice, I hope to contribute to further discussions concerning the relationship between practitioners (in my case teachers) and researchers in different interventional research projects.

Over the last ten years, I have been involved in different interventional projects aimed at developing teaching practices in schools. These projects have been realised through different research and developmental models, but one common feature has been collaboration with teachers. When discussing the development of teaching, and collaboration between teachers and researchers, there are five aspects that always appear to be involved:

- What is the main objective of the project (teacher learning or student learning)?
- Who takes the initiative and defines the problem (the teachers, the researchers, the teachers and researchers together or someone else)?
- Who suggests the solutions to be tested (the teachers, the researchers or the teachers and researchers together)?
- Who masters the theoretical tools used (the researchers, the teachers or both the teachers and the researchers)?
- What type of division of labour is established (is it asynchronous or complementary)?

I have organised this speech into three sections. In the first I will briefly discuss experiences from three interventional projects that I have been involved in: the Farsta Project (2004-
2006), the Botkyrka Project (2009-2010) and the Lidingö Project (2010-2012). In the second part I will elaborate on the Lidingö Project in order to exemplify collaboration, and in the final part I will make some concluding remarks about issues related to teachers’ roles in research. All three projects concern mathematical learning in grades 1-6 in three different Swedish compulsory schools.

The Farsta project

The Farsta Project was one of the first, larger-scale developmental research projects that I was involved in. The other researchers were Ingrid Carlgren, Seth Chaiklin and Viveca Lindberg. For two school years we worked together with two teams of teachers. The aim of the project was to study how to design teaching that would realise the long-term goals – the goals to strive for – in mathematics in the Swedish national curriculum. (Here I would like to stress that the Swedish national curriculum gives teachers considerable space in relation to organisation, method and content).

In this project, Seth introduced some of the principles of developmental teaching following Vasilii V. Davydov (Chaiklin, 2010). The core of the project was the analysis of the knowledge to be taught, in this case measuring volumes. What does it mean to measure? What is the germ cell of this knowledge – what historical activities involving measurement can be discerned? What artefacts are connected to this knowledge and how are they used? This analysis was made by the researchers and presented to the teachers. An ontological assumption was that if a germ cell could be identified then it would be possible to develop (what we called) a “key task”. A task that could create a situation where the students’ need for knowledge was likely to develop (Eriksson & Lindberg, 2007; Lindberg, 2010).

The aim, then, was that the teachers would collaboratively plan and test a teaching sequence that in some aspect was in line with Davydov’s model. But since the Davydov model was totally new to the teachers, the researchers had to support their planning. Four different designs centred round a common key task were tested – two of them were more inline with the Davydov model than the other two.

I think that the teachers learned a lot about the importance of analysing content historically as a design base for a teaching sequence that may realise the long-term goals in the curriculum.

My understanding of the project is, however, that the relationship we established can only be described as asynchronous – in many aspects we had the power over both the content and the solutions. The realised aim of the project can be described as teachers learning how to interpret and work in relation to the national curriculum. The researchers ended up with a deeper understanding of the Swedish teaching tradition, as well as practicing developmental research. The latter further developed by Seth Chaiklin, for example in a chapter entitled: ’Educational research and educational practice: Why can’t we be friends?’
The Botkyrka project

The Botkyrka Project was, in relation to its objective, similar to the Farsta Project. That is, the main objective was teachers’ learning, in this case how to use a model to improve maths teaching. The model the teachers (or some of the teachers) chose was 'learning study' and in relation to this, some concepts drawn from the theory of variation were used.

This model presupposes that the learning problem in focus has to be something that teachers experience as difficult for the students to learn – in our case to expand students’ understanding of the meaning of measurement: so that they would be able to understand that measurement could be something more than just measuring length. When the problem is identified, then the teachers (possibly with support from researchers) are supposed to explore the meaning of content both in relation to students’ prior understanding of it and in relation to the structure. In the Botkyrka Project the content was analysed by subject-specific researchers (Torbjörn Tambour and Mona Hverven) and then discussed with the teachers. The content analysis was not an issue for the teachers, neither in Botkyrka nor in Farsta. The learning study model, however, assigned much power to the teachers to design, at least the first two research lessons in relation to their experience of the students’ prior knowledge, but with continuous support from the researchers. The third revised lesson plan was established more cooperatively. The researchers supported the designs since the teachers were unfamiliar with the theory of variation. The relationship established between researchers and teachers must, as in the Farsta Project, be described as asynchronous – as researchers, in many aspects, had power over the understanding of the content. The solutions, the research lessons designed, were developed much more collaboratively as compared to the Farsta Project. The teachers learned the model (and as far I know, they still use the model for local development work) and they also learned much about the content we were struggling with. The researchers developed a deeper understanding of possible contradictions in relation to this type of developmental research, especially in relation to teachers’ subject knowledge and the Swedish teaching tradition.

<table>
<thead>
<tr>
<th>Farsta (design based &amp; Davydov)</th>
<th>Object of the R&amp;D-project</th>
<th>Definition of problem by</th>
<th>Solution developed by</th>
<th>Theoretical tool mastered by</th>
<th>DoF/L</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teachers learning – curriculum</td>
<td>The researchers</td>
<td>The researchers</td>
<td>The researchers</td>
<td>Asynchronous</td>
<td></td>
</tr>
</tbody>
</table>

29
The Lidingö project

Finally, the Lidingö Project can be divided into two projects or stages. The first project (that perhaps should not be described as a developmental research project) was initiated, formulated and led locally by a teacher and the Principal. A group of teachers had chosen to work with the lesson study model – a model that is similar to the learning study model mentioned earlier – however in a lesson study no specific theory of learning must be used. I was invited by the teachers to act as their mentor during this project.

One of the results of this initial step was that the teachers started to question how they introduced students to mathematics in grade one. In most textbooks, first-graders are introduced to practical and laborative mathematics with simple arithmetical exercises using whole numbers from 1-20. These teachers had experienced that this tradition created problems in student learning – a belief that is supported by many tests, both national and international. During the project we had several discussions about how mathematics is introduced in other settings and in relation to that we also discussed some basic principles of the Davydov curriculum, where students are introduced to algebraic thinking before they start to work with numbers (Davydov, 2008; Dougherty, 2004; Schmittau, 2004; Schmittau, 2005; Sophian, 2007).

The teacher, Marianne Adolfsson Boman, and I planned the second project with support from the Principal. The project was named Utveckling av matematiskt tänkande – expanderade uppgifter i nybörjarundervisningen (Development of mathematical thinking – expanded tasks in primary education) and was scheduled over the first term for first-graders in the autumn of 2012.

One of the aims was to design tasks that would introduce students to algebraic reasoning and especially the understanding of the equals sign and the concept of equality. In the design we tried to use some of the principles in Davydov’s model (2008), but we also used the concept of key tasks as developed in the Farsta Project as a design tool. Further we were interested in what could be counted as indicators of emerging algebraic reasoning among the students.

The Principal allocated two hour every two weeks for those teachers in the school who wished to participate in the project. In total 7 of 10 class teachers and two remedial teachers...
participated, as did the Principal whenever possible. Marianne was responsible for the project at school level and the experiment was carried out in her class of 28 first graders. The teacher in the parallel class taught her students using conventional methods and thereby served as a reference class.

In total, the entire research group consisted of approximately 10 teachers (Marianne, the two remedial teachers, the parallel teacher and one teacher from grade two participated actively throughout the project) and four researchers from Stockholm University. The researchers varied in fields of knowledge; mathematics (Torbjörn Tambour), mathematics education (Mona Hverven), educational sciences (Anders Jansson and Inger Eriksson). Torbjörn supported the group with discussions about mathematical content concerning equality in a mathematical sense and in analysis of student reasoning. Mona participated at the beginning of the project with discussions about task design. Anders participated mostly in relation to the interviews and the analytical work.

In establishing the research group we tried to take advantage of our different knowledge and experience. However our aim was to overcome a situation where the teachers could be regarded as the implementers of a research design. One aspect of this was that teachers needed to develop some understanding of the researchers’ perspective as well as the mathematical content. Before the project started the teachers read relevant literature, some of which was suggested by the researchers. To balance this, it is important to mention that all the researchers have a background as teachers in compulsory school with the exception of Torbjörn. In particular Mona has a background as maths teacher in primary school.

The data in the following examples is based on five recorded, planning meetings, one follow-up discussion with Marianne, and videoed interviews with 16 of the 28 students in November. Marianne and I have been responsible for most of the documentation during the project.¹

I will focus upon the design of the three key tasks that were used during the first three months. I will also give some examples of our initial analysis.

Three key tasks

From the beginning the teachers had a clear picture that the students in Marianne’s class would meet mathematics without traditional operations with digits and numbers. Together we discussed the formation of key tasks (a concept with roots in the Farsta Project, see above).

A key task is a task that allows students to participate in an activity in which their knowledge could gradually develop. Further, a key task is a didactical starting point and how the task develops is related to what the students do or do not do. A key task has the potential to be a learning task if we think in terms of learning activity, as for example how Davydov (2008) describes it. When designing a key task in relation to the ideas of a learning activity the students should be able to develop a need or a motive and become involved in an activity. A learning activity

¹ In total the bulk of data consists of different documentation items (video and or photographs of the lessons held during the autumn), students’ work, a follow-up interview with all students in both Marianne’s class and the parallel class. Marianne has also continued the work during the spring term and in relation to this there is some more documentation.
is not to be confused with a teaching activity – there could be a teaching activity going on without giving the students the opportunity to be engaged in a learning activity. However, a learning activity is vulnerable and often temporary. In a classroom of many students, some may not be engaged in a learning activity even though they participate in the classroom activity. A learning activity is not only a reconstruction of knowledge historically developed in society but also the reconstruction of, as Davydov says,

..historically formed capacities (reflection, analysis, and thought experiment) that are the basis of theoretical consciousness and thinking. (Davydov, 2008: 117)

With this in mind, we analysed all proposed tasks and asked "Is the task historically rich and complex enough and is it designed in such a way that it will provide the opportunity for students to develop a motive to explore the content that is made available in the task?"

Since we were drawing upon the Davydov programme we did not conduct a content analysis as we did in both the Farsta and Botkyrka projects. Instead we used, so to say, the analysis presented by Davydov (Kinnard & Kozulin, 2010; Schmittau, 2004).

Inspired by Davydov and the few examples we have from School 91 in Moscow, the teachers decided that one of the key tasks would concern how to express equivalence in an algebraic form – in this case by the use of letters.

By developing number from the measurement of quantities, Davydov’s curriculum also breaks with the common practice of beginning formal mathematical study with number. Observing that culturally and in individual development, the concept of quantity is prior to that of number, he indicted the rush to number as a manifestation of ignorance of the real origins of concepts /…/. (Schmittau, 2005:18)

The dice game

In the discussions about the concept of equivalence and the equals sign Mona suggested that they could start with the signs 'less than' and 'greater than' through a game using dice. If the students only are given the sign for 'less than' and are told to place their dice so that the sign so to say 'tells the truth'. Sooner or later some of the students will throw a double. And then it was a given situation for discussion. "What shall we do now? Can we use the sign 'less than'? Is there another sign that we can use?"

The teachers saw this as a perfect start. Since the teachers believed that the students, at least from preschool, were familiar with the equals sign and its function, this game was considered more as a warm-up task than a key task.

However, the students’ response was unexpected! When some of the students had thrown a double and the teacher asked them: "Can you use the sign ’less than’ now?" The students answered no! But when asked if they knew another sign that they could use the said that they did not! Well, what shall we do now? The students solved the problem: "We’ll throw the dice again!" One of the students suggested that they could use the ‘less than’ sign but draw it the opposite way – with those two signs you have a sign that shows that it is equal on both sides.
Not until the second group did two students say that they knew a sign for showing equality – the equals sign.

Realising that students’ familiarity with the equals sign did not transfer from their previous work with operational tasks to a different situation prompted the research group to expand the dice task and design it as a key task. Marianne developed the task in different ways and they continued to work with this task for several weeks.

**The King’s servants**

One other aspect that we saw in the Davydov tradition was the idea of creating a situation that could draw upon historical development of measuring things and deciding equivalences. During the summer, Marianne had read about Dagmar Neuman’s mathematical programme “Landet länge sen” (The Long Ago Country). The programme is developed around a fantasy world where mathematics does not exist, there are neither digits nor numbers. The King’s servants were paid with gold sand and fine oils. The problem was that the servants were always suspicious, doubting if they were paid equally. Since Neuman’s programme is directed towards an arithmetic understanding, Marianne adjusted it in relation to our project. Instead of having the students develop a need for numbers, Marianne adjusted it to prompt a need for deciding equivalences or un-equivalences. The students met this problem in different ways.

Sometimes it was clear that the amount of gold sand was distributed very un-equally – but when the students found a way to measure the gold sand they could see that even if it seemed unequal it may be equal. In other situations they could explore the opposite, that even though it seemed equal it was not always so. In this task the students also had the opportunity to develop an understanding of measurement and units.

**Equalities, A+B=C and Cuisinaire-rods?**

In the third key task the students had the opportunity to construct and represent different equivalences with the help of relational material. In this task Marianne chose to work with Cuisinaire rods. These rods were common during the 1960s and 70s as practical material often used in remedial teaching – at that time the rods were used to represent numbers in order to visualise arithmetical operations. Marianne introduced the rods in a way that allowed the students to express different equivalences. The teacher suggested that they could use letters to name the rods when they represented different algebraic expressions. The students suggested the rods could have their initials – so William used W to denote one of the rods he used in an expression.

---

At the end of November, Anders and I interviewed 16 of Marianne’s students. At the interview I showed a card that said A=B+C and asked the students if it was possible to express things like this. The students told me that they could explain if they could use the Cuisinaire rods and the equals sign and the sign for addition (the table was full of different signs on small cards and different materials including the rods).

At the time of the interview the students had only worked with the rods three or four times and they had not previously met any algebraic expressions in written form.

During the interviews the students gave many examples of their ability to handle different algebraic expressions and they expanded the expressions that I presented to them in different ways. Their emerging algebraic reasoning was evident in the interview situation.

The Five aspects in the Lidingö project

The Lidingö Project was realised as a small-scale pilot project and the only financing involved was the time the Principal had allocated to the teachers. The project was, in many aspects, realised as a genuine collaborative project where the teachers and the researchers participated with a common objective – student learning. With reference to Engeström (2008) the project may be described as a formative intervention – neither the researchers nor the teachers “had any answers” to implement and try out. Marianne continued to develop the third key ask during the spring. Furthermore, she has tested the dice task in other classes with more or less the same experience as in her class. In my view this can be regarded as an indicator that the project was owned collaboratively.

The pilot project has also led to possible research collaboration between Stockholm University and the Elkonin-Davydov Research Group in Moscow. A further result is that we now have written a common application to the Swedish Research Council.


If we look at the schematic figure, the five aspects the Lidingö Project can be describe in the following manner:

<table>
<thead>
<tr>
<th></th>
<th>Object of the R&amp;D-project</th>
<th>Definition of problem by</th>
<th>Solution developed by</th>
<th>Theoretical tool mastered by</th>
<th>DofL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Farsta</strong> (design based &amp; Davydov)</td>
<td>Teachers learning – curriculum</td>
<td>The researchers</td>
<td>The researchers</td>
<td>The researchers</td>
<td>Asynchronous</td>
</tr>
<tr>
<td><strong>Botkyrka</strong> (learning study &amp; variation theory)</td>
<td>Teachers learning – Learning study</td>
<td>The teachers</td>
<td>Collaboratively</td>
<td>The researchers</td>
<td>Asynchronous</td>
</tr>
<tr>
<td><strong>Lidingö</strong> (design based research &amp; Davydov)</td>
<td>Students learning – equals sign</td>
<td>Collaboratively</td>
<td>Collaboratively</td>
<td>The researchers and the teachers</td>
<td>Complementary</td>
</tr>
</tbody>
</table>

Concluding remarks

Today, teachers are exposed to considerable pressures, not only from governmental level but also from different experts who knows a lot about children’s development, their social and medical aspects. This may lead to a situation where the teachers are blamed for different failures without being given the power or tools to develop their own profession.

Thus, I think that in relation to interventional research using activity theory it is of great importance to further problematise the relationship between practitioners and researchers. And to problematise how (and by whom) research issues are developed. And who declares the aims of the research. In relation to teachers’ roles in research, I argue that teachers need to be not only collaborators, but also colleagues – or that we participate in their projects. My ambition is to contribute to an alternative to the mainstream picture where teachers are regarded as learners, to a picture where teachers are seen as knowledge producers.

So, the issue that Seth Chaiklin raised with his title ’Educational research and educational practice: Why can’t we be friends?’ Could perhaps be rephrased: Educational research and educational practice: Why can’t we be colleagues?
References


Some methodological considerations for working with the theoretical concepts in educational research

Abstract
In a cultural historical perspective school practice should be oriented to work with theoretical concepts in each subject matter. Although this statement should be discussed from the point of view of its philosophical foundations in this paper we are going to discuss, mainly, its methodological possibilities in an educational research focused on the subject matter analysis process. What are the possibilities of working with the germ-cell, the movement of the abstract to the concrete and the development of the higher mental functions in a specific subject matter? For discussing these questions, we are going to present a particular process of subject matter analysis held in the area of Physical Education. Through the explanation of the conceptual relations that organize this area, we present some methodological considerations for working with the process of analysis of theoretical concepts in educational research. Keywords: cultural historical theory; theoretical concepts; developmental teaching; subject matter analysis.

Introduction
School practice in a developmental perspective in teaching should be oriented to work with theoretical concepts of each discipline, for it is the main content related to students’ theoretical thinking development (DAVIDOV, 1988). The theoretical concept of a phenomenon means the system of relations or the essential and necessary relations in it (ILYENKOVS, 2008; DAVYDOV, 1990) and to identify and systematize these relations one has to involve himself in a subject matter analysis process (CHAIKLIN, 1999).

As Davydov synthetizes, a theoretical concept is a means of “mentally reproducing or constructing an object’s essence. Having a concept of an object means mastering a general method of constructing it, a knowledge of its origin” (DAVYDOV, 1990, p.299). Based on

1 Thanks to Seth Chaiklin for his contributions during the process of developing the analysis presented in this paper.
this general understanding, one could ask: What does “to reproduce an object’s essence” mean? What is “essence” in a cultural historical perspective? What does the origin of an object mean? To answer these questions one has to deal with the methodological aspects involved in the process of making a theoretical analysis of a phenomenon, which could be done both: by the explanation of the philosophical framework related to a subject matter analysis and by the exposition of a particular process that attempts to deal with the identification of the conceptual relations that organize a given phenomenon.

Although both processes keep a unity with each other, in this paper we are going to focus on the discussion of a particular process of subject-matter analysis held in the area of Physical Education. By it, we intend to present some methodological considerations for working with the process of theoretical concept analysis in educational research.

Approaching the theoretical analysis in Physical Education

Physical Education is understood as the school discipline that deals with a particular kind of human activity: namely, Physical Culture (COLETIVO, 1992). By this, to understand what Physical Culture is, to identify and systematize its theoretical or essential relations, one has to explain the objects of this activity (LEONTIEV, 1983).

The object of an activity has two dimensions: it is the structure of the activity (that exists outside us, as a product of human practice in history, a product of the process of producing cultural tools to satisfy certain social needs) and it is, equally, the subject’s orientation in this structure (his motive, that leads him to reproduce the objects of an activity).

The objects of Physical Culture are related to satisfy a general social need of reproducing the social relations in a non-utilitarian way (ELKONIM, 1998). Although this affirmation is extremely value for the analysis of Physical Culture if one has to analyze and to explain this specific human activity, one has to determine the particular objects that satisfy that general social need. Play (or Imaginary Play, as Elkonim studies), Art (including its different types: poetry, painting, theatre etc.) and Physical Culture are different particular activities that can satisfy that general social need. Nevertheless, each one answers this need in a different way, according to its own objects, or its own internal relations.

Therefore, by considering this fundamental purpose in a subject matter analysis – to identify the structure or the object of an activity – we could start to argue about “the how” regarding this task of determining the objects of Physical Culture. An important question to be raised is related to “where” one should start this analysis to identify these internal relations in Physical Culture.

One could consider that the main relations in Physical Culture (or its objects) could be on the traditional forms of Physical Education activities (i.e. Collective Games, Combat Games, Dance, Athletics etc.) as being the main forms through which Physical Culture appears to us. But even if starting from these forms were correct, the important question to answer is: what is being considered as the “main relations” in these phenomena and, therefore, as the concrete
(ILYENKOV, 2008; MARX, 1996) in Physical Culture? Is one considering the concrete as being those attributes related to the sensory-empirical existence of the phenomena, that is, those things that we “see”, we “play” and, eventually, that we can transform into words to describe the particular forms of Physical Culture? If this is so, if one is considering as the starting point for Physical Culture analysis the attributes and features of this phenomenon, one is starting by the external or empirical relations in Physical Culture; one is starting from what the reality appears to be and not, necessarily, what the reality is as such (its essence or its necessary connections).

The starting point for Physical Culture analysis is, therefore, the essential relations in it, the reality or the social relations that were truly captured by thought (MARX, 1996; ILYENKOV, 2008), even if at the beginning of the analysis these relations appear only in their simplest form: as an abstraction. This affirmation may cause some surprise for a non-dialectical perspective, for one could consider that starting from an abstraction is, actually, arbitrary and “not very reliable”.

If anyone, impatient of the consideration of the abstract beginning, should demand that we begin, not with the Beginning, but directly with the matter itself, the answer is that the matter is just this empty Being: it is in the course of the Science that we are to discover what the matter is; the Science must not, therefore, presuppose this as known (HEGEL, 1966, p.87).

So we could ask: do we know, at the beginning of our research, what dance, game or athletics are? And if the answer is “no”, we could say with Hegel: “If anyone, impatient of the consideration of the abstract beginning, should demand that we begin, not with the internal relations or the abstractions of Physical Culture, but directly with its sensory material forms (game, dance etc.), the answer is that these forms are just this empty Being: it is in the course of the Science (in the course of a subject matter analysis) that we are to discover what Physical Culture is and what “game”, “dance”, “athletic” etc. are; the Science must not, therefore, presuppose this as known”.

Given this, to start with this fundamental beginning for the analysis of Physical Culture we can present the names of these essential relations in it: the controlling of other’s action; the mastery of one’s own action; the creation of an image. Physical Culture represents a set of activities that has these three relations as their three main objects.

By presenting the names of these relations we are not, of course, moving into their explanation (their genesis and, mainly, their structure or content). Nevertheless, a name always has in it some “embryo” of an explanation. When we name these relations as being the controlling of other’s action, the mastery of one’s own action and the creation of an image, one could consider that it would be better to name them as being “Game”, “Athletics” and “Dance”, respectively. After all, when we propose the relation of controlling of other’s action,

---

1 In defending this necessary beginning for Physical Culture analysis, to start with its main abstractions (DAVYDOV, 1990) or its cell (MARX, 1996), we are not saying that this is the chronological beginning of a research. To find these essential relations in a given phenomenon one has to deeply investigate its particular forms. However, even knowing that the essential relations are a first product of a research, they are, nevertheless, the real beginning of an analysis, the starting point from which one can explain the genesis and the structure of the phenomenon under study.
aren’t we talking exactly about the relations that occur in games, in which there is an internal opposition between goals and among players? When we propose the relation of mastery of one’s own action aren’t we talking about the relations that happen in athletics contests, in which the subject has to be maximally aware of his own body movement possibilities? And, finally, when we propose the relation of the creation of an image, aren’t we talking about the relations that happen in dance, in which the subjects have to create choreography with their bodies? Well, yes, we are talking about all this. However, we are not talking about just this.

On the one hand, one could give any name for those three relations, for the most important, as we know, is not the name in itself, but the meaning that one is attributing to them (VIGOTSKI, 2009). So, in principle, one could name these relations with these very well-known names in Physical Culture (Game, Athletics and Dance). But, on the other hand, one will have to deal with the meanings that already exist inside these terms. This means that someone could ask us about other forms of Physical Culture activities (e.g. swimming, circus, gymnastic, wrestling etc.) wondering if they are other objects of Physical Culture, once we are presenting Game, Dance and Athletics as objects. And to answer this question we would have to say: “oh no: circus is not another object, for it is inside the relation that we are naming as “Dance”. But “Dance”, for us, is not this thing that we see, but rather it is the relation of the creation of an image with the body, that appears, equally, in circus, in mimicry, in synchronized swimming and other forms”. And then, we would be caught by the logical trap of trying to join the theoretical concepts into the empirical ones.

What we are trying to argue is that these words (game, dance, athletics, wrestling, swimming etc.) represent a sensory-empirical existence of Physical Culture activities, that is, they represent singular forms of Physical Culture existence. Moreover, each one of these singular phenomena of Physical Culture exists as a singular synthesis of those three main abstractions in Physical Culture and not at all as a “representation” of just one of them. Although dance has as its main relation the relation of creating an image, to understand dance in its concreteness, one has to analyze it as a singular synthesis of those three relations, i.e. as a singular synthesis of Physical Culture.

Therefore, the process of explaining Physical Culture in its concreteness involves not only the explanation of the genesis and the structure of each one of those essential relations in it (the genesis and the content of the controlling of other’s action, the mastery of one’s own action and the creation of an image), but also the explanation of the different concrete forms that these relations can assume as variations of those three essential relations.

From these argumentations, it is important to note the meaning of essence for a cultural historical perspective. An essential relation is not an “eternal” essence of something, but rather it is a relation that became essential through human practice (ILYENKOV; MARX), a relation that became an object of an activity. Therefore, the controlling of other’s action; the mastery of one’s own action and the creation of an image weren’t always present in human practice, nor were always essential relationships. Precisely, they became essential relations for some particular human activities through a particular process of human practice development. It is based on this concept of essence that one can understand the meaning of history or historical analysis in the cultural historical theory.
On the one hand the historical analysis can be thought as being the analysis of the process of becoming of a phenomenon through human history: that is, the process through which a relation becomes an essential relation in an activity (i.e. the development of a new activity, in Leontiev’s terms). So, this idea of “historical” would refer to the explanation of why and how the essential relations in Physical Culture were developed as such.

On the other hand – and this is very important – an historical analysis is also the analysis of the internal relations in their own movement; or the analysis of the development of the relations inside the relations and how through them, different singular phenomena can appear. Both meanings seem to be emphasized by Vygotsky in his discussion about the method of analysis in Psychology

To study something historically means to study it in motion. Precisely, this is the very requirement of the dialectical method. To encompass in research the process of development of something in all its phases and changes – from the moment of its appearance to its death – means to reveal its nature, to know its essence, for only in movement does the body exhibit that it is (VYGOTSKI, 1997, 54).

Therefore, to justify some relations as being the essential ones in Physical Culture, one has to analyse Physical Culture development through human history which includes both: its genesis (explaining how those three main relations came to exist as essential relations or as the objects of Physical Culture) and its internal structure (the content or the relations in each one of those three relations).

Speaking in a more concrete term, this would require the task of analysing the historical transformation of Physical Culture’s activities that moved from ritual to secular forms, from a practical, utilitarian purpose (religious, political or economic) to a non-utilitarian one. In this process one can understand the process through which Sport (as a particular institution of our times) could both: allow the development of some particular human actions as general relations (precisely, the relations of the control of other’s action, the mastery of one’s own action and the creation of an image) and, at the same time, allow that these general relations in Physical Culture assumed a very particular form of existence (a form of our time and of our society): as a “universal” and secular contest, with standardized rules and, generally, related to record (GUTTMANN, 1978).

These analyses would allow us to reveal the social conditions through which human being could depict in “dance”, “games”, “wrestling”, “athletics” etc. the “rules in human relations that lead one to success” (ELKONIM, 1998, p.19) in the execution of these activities. These rules are related, precisely, to the relations of the controlling of other’s action, the mastery of one’s own action and the creation of an image.

However, so far, this analysis represents only a part of the historical analysis in Physical Culture because, as we mentioned, an historical analysis must include, necessarily, the explanation of the content of the relations under study (the relations inside the relation). Both explanations (the genesis and the structure of the relations) must run together in an historical analysis, for “to reveal the essence of an object it is necessary to reproduce its real historical development, but this is just possible if we know the essence of this object (KOPNIN, 1978, p.184-185).
In the attempt to make explicit this second moment of an historical analysis (the structure of a relation) we are going to present in the next topic a brief discussion about the relations inside one of Physical Culture’s relations: the controlling of other’s action.

**An introductory explanation of the internal relations in Physical Culture’s relations**

To start the explanation of the relations inside the relation of controlling of other’s action we are going to present the theoretical model (DAVYDOV, 1990) developed for it (figure 1).

By saying that the “controlling of other’s action” is an object of an activity of Physical Culture, it means that this object should emerge not from the subject’s intention, but through the structure of the activity. The structure of this activity not just allows that this object emerges through it but, rather, requires the production and reproduction of this object for its own existence as such.

![Figure 1: the theoretical model for the relation of controlling of other’s action](image)

The initial internal relation represented in the model is given by the goal’s relation to each other, in which we have oppositional goals related to a common target-object (i.e. if goal A is directed to achieve the target-object, goal B will be directed to protect the same target-object). Therefore, the goals are internally related to each other in the sense that one goal just exists through the existence of the other goal: that is, the goals are internally opposite. Because of this inner relation between goals in relation to a same target-object, the actions in this structure will always emerge as an inner relation of opposition: one action will necessary interfere in the other action.

Thus, the whole structure/relation of “controlling of other’s action” is put into movement because the initial opposition between goals in relation to a same target-object makes appear an opposition between actions, that is: in this structure the actions directed to a target-object (or directed to accomplish the goal) will always interfere on each other, as a simultaneous or mutual interference. This “interference”, that can occur under different concrete forms, occurs at the beginning in its simplest form: as an interference that just happens but, at the
same time, by simply existing, it creates the very object of this activity: the “controlling of other’s action”.

Let’s notice that, at this moment, it does not mean that the action was meant to interfere on the other’s action; the interference “just happens” because one action is directed to achieve a goal that is in opposition to the other goal, opposition that comes from the very structure of the relation and that makes emerge in it its fundamental object: the controlling of other’s action. We are not analysing, at this moment, the subject’s relation in this activity, which would require the analysis of how this internal and fundamental relation of controlling of other’s action can be a conscious object by an individual (that will act in this structure mediated by certain cultural tools).

In our model of the controlling of the other’s action it is important to understand the concept of target-object. The target-object means a target (a thing) in relation to a specific object of a singular activity. Therefore, it refers to the specific problem (or the singular object) that one has to act with in a particular-empirical activity that has the controlling of other’s action as its main object.

Let’s bring a brief and “concrete” analysis just to explain a little more this concept of target-object. Let’s consider two different concrete-empirical manifestations of Physical Culture (two different games) that have the controlling of other’s action as their main objects: the tag game and the touching the shoulder game. On the tag game the goal is “to frozen the other through touching on his shoulder” and, as its oppositional goal, “not be touched on the shoulder”. On the touching the shoulder game the goal is “touching as many times as possible the other’s shoulder and, as the oppositional goal, “avoiding being touched on the shoulder”. In both games the shoulder is the target. But when one comes to analyse the singular objects of these games (and through it, their goals) we understand the particularities and singularities that may arise from them because of each different singular object. The problem of the tag game is not just or mainly “touching” the shoulder, but chasing this “shoulder-person” through the space to touch his shoulder. While on the touching the shoulder game the problem is to dominate or to subdue the other’s shoulder-body. That is, the target-object is a target in relation to a specific object of action that emerges, nevertheless, as a singular expression of this general object of Physical Culture: controlling the other’s action).

The importance of this relation (target-object) on the relation of the “controlling of other’s action” is that it is precisely through this relation that one is able to analyse the particularities and singularities of different concrete manifestations in Physical Culture that have the controlling of other’s action as its main object. Different forms of games (rugby, football, volleyball, tennis, curling etc.), of combat sports (judo, box, sumo, fencing etc.) and child play (tug-war; tag game; dodge ball etc.) can be understood as singular manifestations of the general object of controlling of other’s action. Both dimensions, the general and the singular (the structure of the relation in itself and this structure put into movement by a singular-empirical manifestations) must be analysed and explained for the understanding of Physical Culture as a concrete

2 Just to make a point, one could also have the goal of touching the shoulder of someone else, but with a very different purpose: to create an artistic scene with this gesture. In this case, one is moving to another general object of Physical Culture (the creation of an image) whose relation we are not able to detail in this paper.
activity. The affirmation that Physical Culture possesses three main relations (the controlling of other’s action; the mastery of one’s own action; the creation of an image) means that we have to explain each one of these relations in its own structure (as we briefly sketched with the controlling of other’s action) and that we have, as well, to explain the interconnections of these relations in each singular activity of Physical Culture. As we mentioned, any empirical and singular manifestation of Physical Culture is a synthesis of those three relations, despite having one of them as a main relation that subdues the others to it.

Some final considerations

The task of identifying the theoretical relations that organize a given area is, from the point of view of an educational research based on the cultural historical theory, a practical task, for it is related to create the bases for a developmental teaching in school.

Whether one is correct or not in his hypotheses of the essential relations in a given area it is, for sure, an important thing to be discussed in a subject-matter analysis process. But this importance – and moreover, the possibility of evaluating the results of a subject matter analysis – comes from its implications in educational practice. If the essential relations found out are able to act as educational tools for elaborating teaching contents and for designing learning tasks directed to students’ theoretical thinking development, one has an important response regarding its validity, even considering that the subject matter analysis, in itself, may not be complete. Therefore, while finding the essential relations in a given area can be thought as an independent research goal in an educational research, its motive (so to speak) is related to contribute for developing educational practice in the direction of students’ theoretical thinking development. Thus, in a subject matter analysis, educational practice becomes the criteria of its truth.

Beyond this, one has to consider that in the perspective of the cultural historical theory the requirement for developing students’ theoretical thinking is not related just, or mainly, with making the individuals more “capable” or more “clever”, but is related to contribute to educate their personality in the direction of their “full development” (VYGOTSKY) according to human relations possibilities in our current society. As Leontiev says: “A different personality with a different fate is created when the principal motive-goal is elevated to a truly human level and does not weaken man but merges his life with the life of people, with their good […] The summit on this road is man having become, in the words of Gorki, a man of Man” (LEONTIEV, 1983, p.180).
References

Ilyenkov, E. V. The dialectics of the abstract and the concrete in marx’s capital. Delhi, 2008.
Monica Lemos

Collective concept formation of educational management

Abstract

This paper discusses the concept formation of educational management in an educational system from São Paulo, Brazil. This work is part of the doctoral research Concept Concept formation in educational management instruments and voices in a reactive Chain of activities. More specifically, it discusses an approach to educational management from a Vygotskian tradition, which implies that the production of shared meanings and motives is an essential aspect for the development of a creative-collaborative possibility for transforming schools. In order to investigate which educational management concepts are produced, two meetings organized in a course for manager-educators in São Paulo, Brazil, are analyzed. The analysis is based on the senses raised by the participants, meaning negotiation and discussion upon a collective concept formation of educational management. Initial findings reveal that there is still lack of onnection between what is collectively defined as educational management and the different activities developed at some schools. Key words: sense and meaning, concept formation, educational management.

1. Introduction

This paper is part of a research that has been carried out in meetings for manager-educators in a Secretariat of Education in São Paulo, Brazil. The main aim is to analyze how a new concept of educational management is produced in manager-educators meetings in the City of São Paulo, Brazil.

In order to guide the study we address the following question: What is the concept of educational management produced in manager-educators meetings at the secretariat of education, board of education and school?

This paper is organized in three sections. In the first section, research context, I describe how the educational system is organized and how the concept of educational management evolved historically. In the following section, I introduce an initial analysis and interpretation of the study on sense, meaning and concept formation. Finally I point out initial discussion and findings of the present study.
2. Research context

In the city where this research is developed, the Secretariat of Education is the organization in charge of establishing rules and regulations for education in the municipality level. This Secretariat manages thirteen Regional Boards of Education, which are in charge of disseminating the Secretariat demands as well as organizing teaching education programs for manager-educators and teachers from 2,710 schools and about 900,000 students\(^1\).

The research is developed in meetings which main demand is to work with directors, eacher educators, principals, school coordinators and teachers, called in the research as manager-educators, with focus on different management dimensions so they can improve quality of management in a public educational system in São Paulo, Brazil.

![Diagram of São Paulo city educational system](image)

**Figure 1:** São Paulo city broad Educational System

After describing how the educational system is organized it is important to describe three main historical features that reveal the necessity of discussing the topic of educational management.

From the sixties to the eighties, Brazilian politician scenario was in dictatorship. According o Godoy (2011), the main objective for education in the city was an attempt to build a more cohesive and uniform primary educational system, so that people would be able to ead and follow the regulations established by the military government.Godoy (2011) also points that this movement made administrative issues place pedagogical ones due to the reation of a system that received such a diverse educational public. This diversity was generated by the opening of public school, which meant that school could be accessible or everyone, although it was still considered a machine to transmit military dominant position of the state.

---

In the end of the eighties, Paulo Freire, a well-known Brazilian socialist pedagogue and one of the originators of popular education in Latin America (Freire, 1998) became the secretary of education in the city. This was very remarkable for two reasons: first he represented the first choice made by a major who was elected by population, and second, but not less important, Freire was one of the most recognized pedagogues with progressive causes, with educational New Left, and with Critical Pedagogy. His biggest challenge was teaching for liberty in a contemporary metropolis.

For Freire (1998) teaching for liberty meant to take key concepts developed by him as an educator to the city educational management, such as: autonomy, educational system dialogue, school dialogue and school dialogue with community, in other words, school in the world and world in the school. Finally, when referring to quality of education Freire (1992) points out that the administration he took part of did not struggle for just any kind of quality, but for a certain type of quality of education that was democratic, popular, rigorous, serious, respectful, and affirming of a popular presence in the school, in the hope of making schools increasingly happier places to be.

In the nineties with the change of the political party that ran the city changed as well. The party Freire made part of, the Labor Party (PT), the most important left movement at that time was replaced by the Social Democratic Party (PDS), right wing and conservative party whose major\(^2\) was one of the most remarkable businessmen in the city. From the Freirean idea of quality of education as dialogue inside the school system, school and community, based on a total quality management perspective, quality became a way of looking at school as a company and community as clients who were supposed to receive an educational service based on evaluation results and indicators.

\(^2\) Paulo Maluf.
At that time it was also remarkable that instead of investing in teaching education programs, investments were made for teaching recycling and for building schools quickly in a short period.

By focusing on results and evaluation demands, teaching and management education were left aside as well as the connection between school and community. This generated the necessity of rethinking educational management, in which the different contexts from the city educational system could work collectively in order to develop and implement activities in a chain so that the system could be connected, as well as the school actors and the school with its community. In relation to the necessity of concept formation, Vygotsky (1934/2003) states that: The concept is taken in connection with a particular task or need that arises in thinking, in connection with understanding or communication and the fulfillment of a task or instruction that cannot be carried out without the formation of a concept. (Vygotsky, 1934/2003:125)

So, educational management has been transferred from people to proposals, which lacks a dialogue between both. All the contradictions produced throughout the historical movement of educational management in the city generated the necessity of concept formation in educational management.

Sense and meaning towards the formation of a new concept

In order to answer the first question “What is the concept of educational management produced in a course for manager-educators at the secretariat of education, regional board of education and school?” it is important beforehand to move to sense and meaning in order to travel into the process of concept formation.

When we refer to senses we are connected to Leontiev (1978) view of personal sense. According to him, personal sense is always the sense of something (p.20). Personal sense connects the subject with the reality of his own life in his point of view personal sense also reates the partiality of human consciousness (p.19).

Sense and meaning is understood in this work as the interplay between inadequate and adequate ideas (Spinoza, 1677). By inadequate or confused ideas Spinoza does not refer to mistaken ideas, but to ideas that are more away from the object. According to Liberali (2009, p.102) when in contact with their human beings inadequate ideas are put together to create ideas that, though still partial or inadequate, can share more aspects with the infinite and adequate ideas.

Regarding, adequate ideas, Spinoza (1677) refers to an idea which, in so far as it is considered in itself without relation to the object, has all the properties or intrinsic marks of a true idea. (P. II DIV). In the context of this research, as needs and motive are always aken into account it is not possible to state that an idea reaches total adequacy or total rith, so it is partially shared ideas.

The passages presented in this paper refer to a meeting in which participants work on their senses of management in order to come to a meaning of it. In addition, the discussion is framed through four questions: What? What for? Why? and how? Although they are opened
questions they are used to frame management sense so that it contains the core word or set of words that is surrounded by needs, motives and instruments. For this paper I focus on the question *What?*

In the following passage when CR invites participants to recap August 2011 discussion. She wants to make sure that the idea that was partially adequate on that meeting is the same in September meeting.

51 - CR: This is what we discussed last month. *Would you like to add or change anything? Does it express what we said last month? Had anybody taken notes of anything else?* According to PC10 voice positioning it is possible to notice that what was partially adequate in August 2011 is closer to inadequate in September 2011, so PC10 and needs one addition.

70 - PC10: *I don’t know if it suitable but I think it has to do with decision taking. Actions, and decisions.*

As mentioned before, when referring to lack of error when regarding inadequate ideas is it possible to notice that PC10 adds the word, decision in order to compose the meaning of management and she still keeps the word suggested before, actions.

From the moment it is necessary to make the inadequate ideas as closer as possible to the partially adequate idea. In order to make it happen personal senses are manifested through key words in order to compose later on the meaning of management. In the meeting analysed, senses are shared through key words in a movement of inadequate to partially adequate ideas. Partially adequate ideas are reached by questions, disagreements and agreements in order to compose the best management meaning for the RBE-B group.

The discussion regarding management sense, more specifically in the What? moment, here are three key words that are expressed by participants: Decision taking, Resources and People management. For this moment I selected the discussion on Decision taking.

In order to compose the What? part of the management meaning the movement inadequate is established by the way participants share their senses and contribute to the shared composition of what management is. The discourse is organized through a dynamics of autonomous discourse, in which pronouns I, you and they are commonly used, and implicated discourse, in which the pronoun we is commonly used. It is important to mention though, that both modes of discourses are not only remarked by the pronouns, it can also be related to how the voices are positioned and referred to in the discourse (Bronckart, 1999).

70 - PC10: *I don’t know if it suitable but I think it has to do with decision taking. Actions, and decisions.*

71 - CR: So, you would add decisions.

72 - PC10: *I wasn’t here but I think that there are actions that imply decision taking in order to organize them.*
73- CR: Do you think it is worth adding it? Actions and decisions.

74- PC10: When the teacher manages a classroom he/she needs to take decisions. The same with other people involved with school.

75- CR: Student needs to take decision when they decide what they are going to study, how they are going to study. If they are going to study. It is also a decision they are managing their own learning.

78- PC10: It would be shared decision level.

(...) 

81- PC15: When we talk about actions we talk about levels of actions. Planning, decision making...

82- CR: So I think it is good. R, Can you take notes? Is it ok Anything else?

Autonomous and implicated discourse dynamics can be related to inadequate and partially adequate idea. As in more individual, it is further from being shared and being far from hared ideas are further closer to inadequate.

The red markers are referred to the key word Decision taking and in the passage above we show in bold the use of the pronouns and how participants use implicate or autonomous discourse. As we can see, although I think can also be full of other’s meaning, I think shows autonomous discursive positioning, that points out to the personal ense sharing as an inadequate idea towards the meaning composition, closer to the partially adequate ideas.

Discussion and initial finding

Two important features are resulted from the analysis above. The first one relates to the movement of sense and meaning towards concept formation. In his process we can notice that personal sense is used to compose the meaning of educational management that further is going to become the concept.
As a result, the following concept is produced by the group which I remark the part related

**What is management?**

Set of actions that organize work in a participatory, democratic and co-responsible way for the achievement of collective objectives taking into account the context, through decision-making, studying, planning, supervision, training and evaluation.

Establishing a connection with Engeström et.al. (2005), who pose that there are the situational concepts, those which guide to the question: (What’s the concept?) and the visionary-historical concepts that allows discussing (Where is this concept going to take?). By answering both questions: What’s the concept? and Where is this concept going to ake? we can go beyond the theory that embraces the concept showing their development through activities (Engestöm 1987).

In this paper I point out what concept of educational management is produced and it is important to mention that they are further going to be used as instruments for producing and evaluating new instruments of educational management.

The relation between situational concept and visionary-historical concept is established by the movement of management concept definition and by its use investigated from instruments such as management plans.

### References


A Nordic perspective in work practice
To Change or not to change?
Dilemmas in graphic designer’s work

Introduction

Graphic designers work is changing with the digitalization of media, fragmentation of more autonomous audiences and the fall of circulation and revenues of print media. In cross media environments visual design is crucial for attracting audiences, but the design of new artifacts requires also changing the old activity.

We studied the renewal of a print magazine where the art director (AD) faced contradictory demands from the management of the media company, the editor-in-chief, and the editorial office. All stakeholders acknowledged the need for a visual update, but a central goal for the update was to be not noticed invisible to the readers. The magazine needed contemporary more modern visuality to attract younger readers, but there was a fear of loosing the current readers. This posits a dilemma of needing to change and staying the same. The topics of the magazine ranged from cars to computers, bikes and other technology related topics, with emphasis on testing.

This research follows the tradition of ethnographic studies applied in different design contexts and which draw attention to the cooperative and social quality of the design process as it is actually practiced, instead of regarding design as a singular cognitive discipline (Martin 2012). Graphic designers’ work has been mostly characterized with an individual focus: “The graphic designer’s materials are fonts and pictures. She uses a structured process of selecting them to provide herself with the constraints that she needs to be creative in her process” (Eckert 2010). The media AD, who is responsible for the graphic design, is becoming a central figure in developing media products, as visuality becomes more and more important for engaging readers (Helle & Töyry 2009). Therefore opening up graphic design from an organizational point of view is fruitful.

Theoretical background

To understand the dynamics of the magazine update we use two concepts building on cultural historical activity theory: media concept (Helle & Töyry 2009, Helle 2010, 105-118), based on “the concept of activity” (Virkkunen 2006), and contradictions (Engeström 1987, 82-91).
By media concept we refer to the combination of three levels that are inherent in all media titles: 1) values, goals and needs of the publisher, changing audience behavior and needs, social situation, journalistic culture and technology, 2) the organizational structure and division of labor as well the architecture of the media product, e.g. a page plan, 3) the daily work practices, skills and journalistic tools for addressing the reader’s needs and interests when producing media content (Helle & Töyry, 2009; Töyry, 2008).

The concept of dialectical contradictions is central as contradictions are the source of change and development. When contradictions become aggravated some individual change efforts can grow into collaborative envisioning and deliberate collective change efforts (Engeström 2001). Contradictions are conceptualized by analyzing disturbances and innovations within and between activity systems (Engeström, 1999). They can be divided into primary, secondary, tertiary and quaternary contradictions (Engeström 1987, 87-88). Contradictions can be identified as everyday dilemmas, conflicts as resistance, as critical conflicts, and finally double binds, which indicate a real crisis (Engeström & Sannino 2011).

We find the concept of dilemma most useful for our analysis since the magazines simultaneous need to change and the need to remain the same resonates well with the definition of a dilemma. A dilemma is “an expression or exchange of incompatible evaluations, either between people or within the discourse of a single person. It is commonly expressed in the form of hedges and hesitations, such as “on the one hand [ . . . ] on the other hand” and “yes, but”. In ongoing discourse, a dilemma is typically reproduced rather than resolved, often with the help of denial or reformulation” (Engeström & Sannino 2011). We use the three levels of the media concept to analyze how the change effort materializes in the media organization and the work of the AD, and where the dilemmatic situations emerge. We show how the graphic designer is caught in a web of conflicting demands within the media organization.

Methods, data and analysis

The data is part of a larger set of data collected during a five-month ethnography following a visual update process of a magazine, and for this paper five meetings concerning the visual update, and six interviews, were chosen. The thematic analysis of the transcribed discourse began by identifying talk about change. Thereafter talk about change was coded using descriptive coding (Saldana 2009, 70), showing themes that emerge from the talk about change. Finally, theoretical coding (ibid., 163) was used to identify which level of the media concept the themes referred to. This is how we were able to identify what kind of change was talked about at the different levels of the organization. The concept of dilemma will be used to analyze what kinds of dilemmas were present on the different levels of the media concept and between the levels, in order to understand what contributed to the dilemmatic character of the change process.
Themes of change talk on the different levels of the media concept

Themes of change talk on the first level include the values, goals and needs of the publisher, and show a dilemma where the media company had financial challenges, and was at the same time developing digital publishing, while the magazine is was still quite profitable. Financial challenges in the media field was one theme that was present especially in the management talk. Reaching out to a younger generation was recognized as a challenge by the management, because of the growing interest in digital reading instead of print. This direction was also visible in the talk about Change in publishing platforms, e.g. iPad. Still, the theme of Need to maintain the strong magazine brand was visible in the talk, as the profits came from older long-term subscribers. The themes concerning the readers showed that they were seen as conservative since Readers are understood to oppose a big change and might regard the update a Facelift procedure.

From the perspective of graphic design the dilemmas emerge between the different design processes depending on the content creation requirements of the magazine and the iPad. in the media house, structure/PLATFORM?/epäselvää mitä tarkoitat of the media used BY WHOM?, logic of digital reading vs. reading printreading, and visual conventions of the different media products and platforms. The fairly independently editorial office has produced the content of the magazine and the magazine arrives delivered home to the reader as a fairly independent piece of reading. This had been a profitable way of functioning from the media organization’s perspective. The iPad production on the other hand is involved collaboration between different parts of the media organization and uses new elements that are not provided by the editorial office, such as video production or editing. This meant balancing with the same content between two platforms, the old magazine and the new iPad. The iPad required the design of new visual elements and collaboration beyond the editorial office, but was financially not yet profitable.

Themes on the second level of the media concept concentrated on the organizational structure of labor and architecture of the content. Here show the a dilemmas shows on one hand the where recognition of the challenges and the influence of the iPad are recognized, but on the other hand the small changes in the structure of the magazine. One theme in the management talk was that Expertise is challenged by the web and social media, and that the careful testing expertise and high information status of the brand is challenged by a new emphasis of peer-to-peer networks and evaluations. A theme present especially in the AD’s talk was about how the New visuality for iPad should affect magazine visuality, and this emphasized that the magazine should follow the development of visuality for the iPad. Still, some themes, especially in the talk of the editor in chief and the AD, emphasized Slow evolutionary change instead of noticeable change and there was also talk about a History of incremental visual changes. The talk concerning the theme Story types and page plan not changed was present especially in the talk of the editor in chief and the AD, as was talk pointing out that Elements of change are visual details. This meant that the structure of the content was not changed and the story types and the page plan remained the same.
From the point of view of the graphic design the dilemmas means designing new visual elements, but doing it in a way that made possible the same amount of content and the same types of stories as before. For example, the new text type had to fit the same space as the old text type. The visuals where to be similar to the old design so, that the readers would not think that the content had changed. The magazine was to be completely recognizable as the same old magazine as before, even though the fonts were new, and the logo slightly changed.

Another dilemma on the second level of the media concept was present in the theme concerning how The media organization strategy emphasizes sharing resources between editorial offices. This pointed out the difference between the new more collaborative strategy of the company management and the independent editorial office. This talk was present, but did not influence the update process, as becomes clear form the paragraph concerning the daily practices on the third level.

From the point of view of the graphic design the dilemma means designing new visual elements, but doing it in a way that makes possible the same amount of content and the same types of stories as before. For example, the new text type had to fit the same space as the old text type. The impression of the visuals should be similar to the old design so that the readers do not think that the content had changed. The magazine should still be completely recognizable as the same old magazine as before, even though the fonts were new, or the logo slightly changed.

Themes on the second third level of the media concept, the daily work practices, also show a dilemma in the working practices between the independent work practices of the editorial offices and reorganization of the media organization into a more collaborative way of working and the shared designers and photographers between media titles. tools of the media organization. One theme in the talk of all person people present was that The media organization strategy emphasizes sharing resources between editorial offices. This pointed out the new strategy new elements influencing the work process of the company management.

On the third, daily practice, level of the media concept the changes concerning the update were fairly small and affected only the graphic designers. The AD worked on the visual update mostly at home in the evenings and weekends, so the update process had little influence on the everyday work in the editorial office. Both the management and the members of the editorial office talked about Development of planning in the editorial office, but the members persons planning the update were few. Instead, one theme present particularly in the talk of the AD was that Visual update should have little effect on the work of the editorial office. Both the AD and the editor-in-chief agreed that Readers’ reactions are to be minimized, and is fear for the current readers reaction. Only the AD talked about how Visual changes affect graphic freelancers’ work, meaning collaborators of the magazine not situated in the editorial office. Beyond the visual update, everybody recognized that Collaboration in photography is
difficult, because the work principles of the editorial office and the shared photo group of the media company were very different.

The dilemma from the perspective of the work of the AD and the graphic designers is was that the update alloweds the some changes changing ofin visual elements but they are were not supposed to influence or change the content production beyond the graphic designers work. For graphic designers, including freelancers, this meansst learning new layout principles, color use, and font styles. But careful measuring thatof the new fonts allowed the same amounts of text as before and the old elements for all different types of stories were still are available. TheAD worked on the visual update mostly at home in the evenings and weekends, so the update process had little influence on the everyday work in the editorial office.

Discussion

The goals of the visual update seem different on each level of the media concept. When looking at the different levels of the media concept it becomes visible that there are clear change efforts on all levels of the media concept, but the different levels are fairly independent of each other. The financial challenges or the need to attract a younger generation are not transferred to the second level, to the actual shared structures, since the iPad is not yet profitable and the editorial office is focusing on producing the magazine for its old readers. The difficulties in daily work shows how the visual update only concerns collaboration with the media company, that are visible on the third second level, seem disconnected from the goals of the editorial office, since they support including also a different content than in form the current magazine. On the third level the visual update only affected graphic designers’ work, butand the handling of some typographic details..

It could be argued that a connection between the different levels of the media concept could have been established by using the visual update as a mediating artifact for discussing and implementing major change. If there had been a more clear and shared idea about how the work process should be changed to support digital publishing, like iPad, and the collaboration within the media organization, the visual update could have been used as a tool to experiment and negotiate the new way of working for the whole editorial office. But in this case the dilemmatic quality of the update did not require more radical decisions as the update was designed to support the existing work processes.

This update reflects the uncertainty in the media field where it is unclear how media companies and their print products can survive the changes in the reading habits and the influence of the new electronic reading devices. In our case a strong brand was built around the profitable print magazine, and there seem to be several reasons that support only incremental changes. Still, in a media organization where the strategies and changes in the technologies available have an impact on all the magazines published, it is not possible to leave one editorial office in a vacuum in the long run. The changes in the organizational strategy influence all the elements of the media organization as an activity system, and the tools/technology in use directly influence the content produced.
Small changes in the visuals can be done with a selected group of people, but if a bigger change effort is needed it seems to require connecting the visual update to the larger changes needed in the work process, and to other challenges taking place. The AD is central in developing magazines and is thus situated at the crossroads of conflicting demands from management, readers and editorial office. The visual update could become a tool for supporting negotiations to implement the strategic change presented by management and the changing media environment.

References

A comparative analysis of university pedagogical centres’ activities in Mozambique and Sweden

Abstract

Many universities around the globe consider raising the pedagogical competence of their teachers to be an important task. The common way of approaching this task is the creation within the university of a specialised centre in charge of staff pedagogical development. This study attempts to provide an analysis of activities conducted by two pedagogical centres situated in two dramatically different contexts: one of the poorest countries in the world (Mozambique) and one of the richest (Sweden). A qualitative study was carried out based on a comparative policy document analysis, on-site observations and semi-structured interviews with two staff members from both centres. Cultural-Historical Activity Theory (CHAT) provided a theoretical framework for the analysis. The collective activity system is taken as a unit of analysis that connects psychological, cultural and contextual perspectives (Engeström, 1999). We found that the official rhetoric of both universities explicitly focuses on the development of pedagogical competence for all categories of teachers. Therefore, as was expected, similarities were identified in the object and expected outcomes of the centres’ activity. However, due to significant differences in historical pre-conditions, cultural contexts and artefacts used for mediating activities in the two centres the findings revealed many differences in the corresponding collective activity systems. The study suggests that the implementation of pedagogical training at a university should carefully consider contextual, social and cultural factors shaping collective activity systems and if necessary construct compensatory artefacts to ameliorate possible frictions in the developmental process.

Key words: University teacher, pedagogical competence, activity theory, context

Introduction

The pedagogical education of university teachers has become common practice in many countries around the world (Lindberg-Sand & Sonesson, 2008). Quality development in higher education is linked to the quality of teaching and learning, which is connected to the teachers’ acquisition of a higher level of pedagogical competence. Ryegård, Apelgren & Ols-
son (2010) define pedagogical competence as a continuous development of teaching and personal professional development, supporting and facilitating student learning in the best way. The focus of many pedagogical projects at university level is placed on teachers’ pedagogical competence development.

However, different universities approach this issue in different ways. For example, it could be in the form of compulsory or voluntary attendance of pedagogical courses. According to Tågerud (2010) courses in the pedagogy of higher education are now offered by all Swedish universities. Many universities consider a ten-week course in higher education pedagogy compulsory for tenure track lecturers (Lindberg-Sand & Sonesson, 2008).

This study aims to examine how the development of teachers’ pedagogical competence is framed and implemented in two universities located in two different contexts, i.e. Umeå University in Sweden and Eduardo Mondlane University (UEM) in Maputo, the capital of Mozambique. At Umeå University the Centre for Teaching and Learning [Universitets pedagogiskt centrum] (UPC) provides pedagogical development activities. At the UEM the implementation of pedagogical education is carried out by the Academic Development Centre [Centro de Desenvolvimento Académico] (CDA).

In this study the following research questions were posed:

- What are the contextual preconditions at Umeå University and at UEM concerning the development of pedagogical competence?
- What are the similarities and differences between activities carried out at UPC and CDA?

This study brings into consideration issues related to the nature of social activities and the role of cultural context in shaping the development of teachers’ pedagogical competence. In this regard, cultural and historical dimensions of development presented in Cultural-Historical Activity Theory (CHAT) provide important insights for the analysis.

Theoretical framework

In Cultural-Historical Activity Theory, human activity development is conceptualised as a complex sociocultural and psychological process. According to Kaptelinin & Nardi (2012) Vygotsky defined the process of human development as the appearance of new functions and attributes that first emerge as distributed between individuals and their social environment (inter-psychological) and then become appropriated by individuals (intra-psychological). CHAT also suggests that the historical process of human development is based on active transformations of existing environments and the creation of new ones, through human labour in a collective and collaborative use of tools (Stetsenko & Arievitch, 2004). CHAT sees human activities as products of their history and culture (Daniels, Lauder & Porter, 2009). Any developmental activity assumes participants to be active agents in collective practices, communities and institutions (Engeström & Miettinen, 1999).

An activity is considered to be the key source of development of both the social practice/object and the subject. An analysis of activities therefore opens up the possibility to properly understand both subjects and objects, and technical tools as mediators changing the activity
(Kaptelinin & Nardi, 2006). Logically, this also concerns educational activities. Gutiérrez (2002) suggests that educational practices, constituted through the junction of cultural artefacts, beliefs, values, and normative routines, can be described as an activity system. Following this line of thought, we assume that CHAT can contribute to understanding activities designed to develop teachers’ pedagogical competence. In this study, the collective activities of pedagogical centres functioning in two different contexts are chosen as the units of analysis.

Accepting that an important role is played by the context in pedagogical development, Gutiérrez et al. (1999) make the inference in their research that contexts are characterized by conflicts, tensions and diversity. We will pay particular attention to these qualities of the context.

Figure 1 below shows the schematic structure of an activity adapted for the development of pedagogical competence. In particular, it highlights the influence of the context and mediating tools on activities in pedagogical centres.

**Figure 1: Structure and context of the pedagogical development activity**

In the figure above, the subject (teachers) need to develop their pedagogical competence (object) in order to enhance the quality of teaching and learning (outputs) through pedagogical courses supported by different means (mediating tools). According to Kaptelinin & Nardi (2006) mediating tools facilitate the coordination of individual contributions to collective activities and signify the social status and specific responsibilities of their owners.

**Methods**

A qualitative approach was carried out, based on a comparison of the official documents that guide and regulate the process of teaching and learning at Umeå University and UEM. Some documents were accessed online and the facilitators of the courses provided others. The main researcher (the first author) herself attended courses in both centres in order to gain better
understanding of the contents, methods and strategies used. Thus, notes were taken during the course, about aspects of interest.

In addition, semi-structured interviews were conducted with two course leaders at UPC and CDA respectively. The interviews were carried out via Skype at UPC and face to face at CDA. Issues related to curriculum organization, activities developed, research, and future perspectives were approached. The selection of the respondents was done by convenience and length of their experience of working at the centres. The interviews lasted from 45 to 50 minutes. The answers were recorded and transcribed verbatim. The validation was done in two ways: for the group interviewed via Skype, the transcripts were sent by email for confirmation. For the other group, the interviewer and respondents listened together to the answers given and the correctness of the replies was confirmed. Ethical considerations were observed. All interviewees gave their permission to participate in the study as well as to use the information provided for research purpose.

These interviews complemented the data collected through the document analysis, which was done at two levels: the university and the centre. At the university level, official documents were compared in terms of the demands made for development of pedagogical competences, and how these competences were conceptualized and operationalized in both universities. At the level of the centres, we compared the curriculum documents describing the courses and contents offered as well as the course evaluation summaries. The latter was done only for two similar courses Assessment and Evaluation [UPC] and Students Assessment [CDA].

Governmental publications and official statistics provided the necessary background information for an understanding of the broader context. Through the comparison of official policy documents, we tried to see what is culturally specific and what are globally accepted trends. Also, following Schriewer (2000), we expected a comparative analysis of the official documents to provide evidences for causal explanatory arguments of the pedagogical centres’ activities. The document analysis was done through consequent, iterative readings and comparison of the official texts and identification of common and different positions.

Findings

Two broader themes became evident during data analysis through the CHAT theoretical lens, namely, factors affecting the activities of the centres related to mediating tools and the context of activity. In relation to mediating tools, these are presented in two categories: Official documents as mediating tools and Pedagogical tools and methods. In relation to the second theme the following two categories were identified Administrative and organisational frames and Local contexts of the centres’ activities.
Official documents as mediating tools

The analysis of official documents shows that both universities are concerned with teachers’ pedagogical competence. For instance, according to the pedagogical action plan of Umeå University, pedagogical development must be systematically enforced in order to safeguard its position as one of Sweden’s most attractive and strong providers of higher education (Umeå Universitet, 2009). Similarly, at UEM, official documents underline the importance of continuous, regular education and lecturers’ pedagogical actualisation in order to assure the high quality of professionals (UEM, 2008).

At national level in Mozambique, the higher education law in its article 3g (Boletim da República, 2009) stresses the need for teachers and researchers’ continuing education in order to respond to the needs of modern society. At the university level, the Operational Plan 2010-2014 (UEM, 2010) underlines the need for the definition of the profile of academic excellence. Further, the same document expects the creation of an instrument for teaching quality assessment at UEM. The Strategic Plan of UEM stresses the need to define “clear terms of reference” for a lecturer’s activity and the lecturer’s professional profile. However, the document also expresses concern that “the current professional career regulation does not explicitly identify connection between pedagogical competence and career in the academy” (UEM, 2008, pp. 21-22).

Further, we found that employment regulations at UEM do not clearly demand consideration of pedagogical skills. At Umeå University there are clear rules and guidelines for teacher employment at the University (Umeå Universitet, 2006a; Umeå Universitet, 2006b). Demonstration of teaching skills is a requirement for employment of all categories of teachers. Further, they should also take an introductory six-week course in higher education pedagogy and carry out a continuous compilation of their teaching portfolio.

A similar situation was found concerning the yearly evaluation of staff performance. In Umeå, pedagogical development, including attendance of UPC courses, is an important indicator of professional growth and normally even included as a criteria for individual salary setting by the departments. In Maputo, the Guidelines on assessment of teacher’s and researcher’s performance (UEM, 2005) does not mention participation in university pedagogy courses as an indicator for teacher’s professional development during the year. Pedagogical courses are only requested when considering category promotion of junior teaching staff, for example, from probationers to assistant lecturers.

Thus, the official policy and guidelines in both universities provide facilitation for the activities of the pedagogical centres. However, in Umeå, we could find more concrete support for conducting staff pedagogical training than in Maputo.

Pedagogical tools and methods

Expectedly, a clear difference between the centres was identified in material facilities mediating pedagogical activities. CDA staff reported lack of classrooms, computers and out-of-
date library. At Umeå University, there is a specific room for UPC courses, with IT resources and an up-to-date library.

Related to the work methods, course participants in both centres appreciated interactive activities, like group work, discussions, group presentations and feedback from the facilitators. At UPC, participants requested more clear links in the discussions and presentations with the course literature. At CDA, participants were more focused on feedback from the facilitators for clarification of concepts, rather than references to the literature.

Course evaluations were used in both countries as mediators of learning. At UPC small evaluations were made after each day or after two days of the course. This elucidates the formative purpose of the course evaluation system used there – to continuously attune the activities of the course to participant needs. At CDA the evaluations were made at the end of the course aiming to improve the next course. The type and content of the evaluation questions used in both centres were rather similar – enquiring about participants’ satisfaction and suggestions for improvement. The main differences were related to more clear focus at UPC on gender issues, information technologies (IT) and literature used in the course, themes which were not mentioned in CDA’s evaluation instruments.

Administrative and organisational frames

The two centres clearly differ in relation to administrative placement and degree of academic freedom. UPC is a rather self-steering centre working in coordination with the Office for Human Resources [Personalenheten]. CDA belongs to the Faculty of Education without any financial or administrative autonomy and thoroughly controlled by the faculty. They also differ in the activity orientation of the centres. UPC’s target group are teachers and administrators. CDA’s target group are teachers and students.

In relation to the curriculum development of the centres, the findings showed some difference and some similarities. UPC delivers more than 20 courses, many of them ICT based, and provides diversified internal (within university) and external pedagogical consultancies. The current process of restructuring the courses at UPC is about reducing the number of courses, not the contents. This process has been initiated internally by UPC staff in order to optimise the curriculum. At CDA, the current restructuring of the courses has been instigated by central university administration. It prescribes an increased number of courses delivered from 4 to 14 in one year, most of them with new contents, but without any improvement of material conditions for the centre concerning, for instance, an information technology component.

Similarities were found in the contents of some courses and also the methods and strategies used in their implementation, for example, in the Assessment and Evaluation course [UPC] and the Students Assessment course [CDA]. Also, some similarities were found in the ways the courses are led and administrated. In general, all teachers at both centres can teach any scheduled course. There are two course leaders, a main and a co-facilitator. However,
at Umeå University the main course teacher is always from UPC. At CDA, with the current dramatic increase in the number of courses, the course leader can come from any faculty or department at the university. This poses, according to the interviewees, a challenge to the maintenance of the established interactive dialogical method of course delivery at CDA.

Regarding research activities, we found that at both centres few research articles are published yearly. This is done mainly by the staff members involved in PhD programmes. However, UPC organises an annual pedagogical research and development conference at the university, as part of its assignment, where proceedings are peer reviewed. Reports from the staff interviewed revealed that both centres wish to improve in this field.

The local contexts of the centres’ activities

The findings showed significant differences concerning the conditions and socio-cultural contexts where the two centres function. One illustrative example of such differences is how university infrastructure supports the centres’ activities. Libraries at Umeå University provide top world-class service for students and researchers. UEM has a modern library building but CDA cannot count on good service as the library services are minimally efficient. The same is true for the Internet connection, which is not reliable at UEM.

One important contextual factor for the pedagogical centres’ activities is who attends the courses. In Umeå it is a rather broad audience that includes researchers, PhD students, senior and junior teaching staff from different faculties and centres. This opens an opportunity for multi-level exchange of experience and productive discussions. In Maputo, the major group of participants in CDA courses are junior teachers. Senior staff, particularly PhD holders, very seldom attend any CDA activities. This limits the learning opportunities during the group work.

Staff pedagogical education is aimed at supporting different kinds of academic practices at the university. At Umeå University this includes PhD supervision, on-campus and distance teaching, using traditional approaches and a variety of modern multimedia tools. Thus, UPC designs and provides a broad selection of courses to meet these needs. In Mozambique, teaching is the main activity of the university; it is done on-campus and with very limited technical possibilities for using the Internet and multimedia. This is what CDA activities are oriented towards – classroom teaching/learning with rather large groups of students.

Teaching at Swedish universities is normally done in both the Swedish and English languages and academic work in general is conducted in these two languages. Therefore, many of the UPC courses are also delivered in English and Swedish, because there are many international PhD students, teachers and researchers at the university. At UEM, Portuguese is the only language of instruction. All CDA activities are conducted in this language.

General ideological discourse in society always affects educational activities. In Sweden the dominating topics in the social sphere are gender and equality. UPC staff have to consider these issues when working with course curriculum. Course facilitators in Mozambique
unavoidably will consider issues of poverty and development which dominate discourse in the public sphere.

The economic situation at the university defines the possibilities for the competence development of the centres’ staff. In Umeå every UPC staff member has 20% of their working time allocated for individual competence development. In Mozambique CDA teachers do not have time formally allocated for this purpose. They have to teach 100% if they are not involved in masters’ studies or a PhD program abroad.

**Discussion**

The study focused on a comparative analysis of two university pedagogical centres’ activities, one located in Mozambique and another in Sweden. We found that the official policy of both universities explicitly demands the development of pedagogical competence for all categories of teachers. Using the CHAT conceptual framework, we can say that similarities were identified in the Object and expected outcomes of both centres’ activity (see figure 1). However, the results of the comparison revealed many differences in the collective activities of the university pedagogical centres. Our analysis suggests that reasons for these differences could be found, primarily, in the artefacts mediating the centres’ activities and the contexts where the centres operate.

The study identified some clear tensions between mediating tools and the object of activity in the Mozambican context. The rhetoric of official documents is not supported by instrumental tools for the sustainable implementation of university pedagogy courses. This is in contrast to the situation in Sweden. Lindberg-Sand and Sonesson (2008) point out that in Sweden teaching competence is brought forward as a central aspect of quality programmes in higher education. Policy on the development of teachers’ pedagogical competence is aligned with the regulations of teacher employment at the university. However, at UEM, novice teachers are not requested to show pedagogical skills for their employment. Policy and practice alignment is rather weak. This situation becomes understandable if we look at contextual pre-conditions. In Sweden, there is hard competition for any position available at the university. Therefore, it is possible to make sophisticated selection criteria, including the demonstration of pedagogical skills. On the contrary, in Mozambique, where availability of competent people for any position is very limited a selection is made primarily based on professional/subject knowledge.

CHAT emphasizes the role of mediation or “auxiliary stimulus” as extrinsic stimulus of human action that comes from outside in order to control the behaviour (Engeström, 1999, p. 29). In the case of UEM, the inclusion of a pedagogical dimension in the terms of reference for teachers’ employment and in the regulations for annual assessment of teachers and researchers’ performance could be such an “auxiliary stimulus” for pedagogical development.

CDA and UPC are influenced by the specific academic contexts they belong to but also exercise collective agency aiming to change these contexts. This is not a friction-free process, but the staff interviewed were still enthusiastic about their mission.
References

The emerging object of municipal home care – collaborative innovation as a potential for expansion

1. Introduction

The national reform of the social and health services is one of the main political topics in Finland. The focus of discussion is on the national organizing and financing structure of social and health care provided by the public sector. The challenge faced at the organizational level is how to produce services more qualitatively and efficiently, while simultaneously improving the services to respond to the changing needs of customers.

In this paper we present the case: the municipal home care team which is working under these challenges. The team offers nursing and support mainly to elderly people in their daily tasks. The customers of home care are changing: they increasingly suffer various diseases and need help several times a day. The challenge is to develop working practices so that they enable the customer to live at home and meet the customers’ needs as well as possible. Our interest is in how home care activity is changing qualitatively due to the collaborative innovation.

2. Collaborative innovation as a learning process

We focus on innovations at the workplace level, at the level of local activity. Our interest is in collaborative innovation and the innovations at home care team. In this paper we define innovation as something which is new in the local context, in which it is developed or implemented, even though its novelty may be limited in a wider context. (cf. Ellström 2010)

In the short term, those local innovations may look marginal, but in the long term they are important for the strategic development of an organization (cf. Høyryp 2010). For example in the school context, local innovations are typically small scale changes in specific and local practices that mediate the development of activity and are triggered by new pedagogical ideas, new technologies, etc. These kinds of innovations spread through interpersonal relations and might be implemented in local settings elsewhere. (Sannino & Nocon 2008)

Local innovations rarely become system wide, although this is possible. Instead, system-wide or more general innovations usually trigger local innovations. These local innovations
are not mechanical applications or copies of a more general idea: they need to be formulated to suit the local activity (Ellström 2010; Sannino & Nocon 2008).

In this paper we are interested in how the activity of home care team develops through innovations in the collaborative innovation process. The innovation process is the learning process in which something new is created (Ellström 2010; Høyryp 2010; Sannino & Nocon 2008). We define collaborative innovation as an expansive learning of the work community in which the new collective structure of activity develops through innovations and practical solutions (cf. Engeström 1987; 1995). Thus collaborative innovation is collective activity in which employees, customers and others involved develop practices and services actively, on their own initiative. In this learning process, collaborative understanding and a qualitatively new form of activity emerges.

3. Qualitative change of activity

In Activity Theory and Developmental Work Research (DWR) the core of the collective and culturally mediated activity is the object. The whole activity system is constructed around the object; the object embodies the meaning, the motive and purpose of the activity. The activity is continuously changing; the sources of change are contradictions, which generate disturbances, but also innovations. (Engeström 1987; 2001) In DWR the tool for analysing the development of the activity is the activity system model (Figure 1) (Engeström 1987).

![Figure 1: Activity system (Engeström 1987)](image)

The activity changes qualitatively through expansive transitions. In this framework, collaborative innovation can be seen as an expansive learning process in which the object of activity is changing qualitatively, through specific and situated actions (Engeström 1987). Thus innovations are source for the potential qualitative change. That potential, i.e. the attempts to expand the object, can be distinguished and analysed through four dimensions of expansion (Engeström 2001, Hasu 2000):
Expansion in the social-spatial dimension means the broader view of actors or network collaborating – “who else should be included (Engeström 2001) and what other artefacts and systems should be considered?” (Hasu 2000). For example, the patient and their illness are constructed in their own social network, which includes other caregivers involved with patient (instead of being regarded as an isolated disease) (Engeström 2001). In the temporal dimension, the time span related to the object expands. “What previous and forthcoming steps (Engeström 2001) and potential new directions and approaches should be considered?” (Hasu 2000). For example, the patient and their care are seen as a long term trajectory, instead of discrete visits (Engeström 2001). In the moral-ideological dimension, the responsibilities and the power of actors are taken into consideration. “Who is responsible and who decides?” (Engeström 2001) For example, a team or group of practitioners are responsible for the overall process instead of each individual being responsible for individual tasks (Hasu 2001). In the systemic-developmental dimension, the actions taken also somehow influence the practice in the long term: “How does this shape the future of the activity (Engeström 2001) but also how should artefacts used in the activity be developed (Hasu 2000)?”

4. Case - Home care team

Our case is that of the home care team. Team was founded in 2009 when home service and home nursing were combined into one home care unit. The organization is a social and health care federation of municipalities in western Finland. The nurses and practical nurses of the team offer nursing and support in daily tasks (washing, dressing, breakfast, also walking outdoors) mainly to elderly people, to enable them to live at home for as long as possible. The density of the home visits varies from one visit a week to several visits a day. A need-based care and service plan is made for each customer. More often customers have multiple diseases and increasing need of help in daily tasks. Situations at home sometimes change quickly, and the care givers need to be flexible.

5. Research questions, data and method of analysis

In this paper we focus on home care activity; how the activity is developing by innovations? How do the bottom-up innovations of the team, but also organization-wide top-down innovations, are expanding the object of activity?

Our data consists of five transcripted interviews: with the immediate superior, nurse, and three practical nurses of the home care team. The transcription of the data was divided into episodes of discussion, which were named. In further analysis we focused on the episodes classified as “change in activity of work community” and “disturbances”. As a framework of analysis we used the four dimensions of expansion (Engeström 2001, Hasu 2000).
6. Changing activity of home care

The change in home care activity has been triggered by national policy and organizational strategies, but also the needs of the local customers and ideas of employees. Top-down and bottom-up innovations are made simultaneously (see figure 2; top-down innovations marked with blue and bottom-up innovations with green). The objective of home care is to enable living at home for as long as possible. Customers have multiple diseases, and special treatments are given at home. This requires a comprehensive view. We use the dimensions of expansion to make visible how the new object develops through innovations.

[Figure 2: Innovations at home care team]

Social-spatial dimension: From home care to the care given by the network

Regular SAS meetings (plan, evaluate, (re)locate) in which the customer’s service needs are discussed together, as well as informal communication between units, have been expanding the object of home care in the social dimension.

Networks of actors (physiotherapist, doctor, and geriatric and interval units of hospital) are seen as important partners when accurate care is offered to customers. Co-operation has become part of the work of the immediate superior and nurse. The division of labour between units is also discussed. Taking IT systems into use makes it possible to share information in the network. In addition, relatives are contacted via notebooks and invited to take part in care plan meetings; they are given a more important role in the care.

Temporal dimension: From discrete visits to trajectory of care

New IT systems, SAS meetings and the care plan meetings with each customer mediate the transition of the object; instead of discrete visits at home, the object of the home care team is
moving towards a trajectory of care. The object is also shared with the network, for example home care and interval units regularly discuss their common customers and the continuity of their care. The innovations of the home care team also expand the object in thetemporal dimension; new practical tools, like different forms, help communication between team members and support the trajectory of care. The overall situation of the customer is also taken into account in the planning of work and tasks, and their pace and intensity.

**Moral-ideological dimension: From care to care planning and documentation**

The idea of the compact use of resources has lowered the occupational boundaries between nurses and practical nurses; for example medicines are distributed by practical nurses and nurses make breakfast during the nursing visits. Rehabilitative work and documentation is becoming part of everyone’s work. The object of work has also expanded from care to evaluating the functional ability of and with the customers, also to care planning and updating of care plans. The important customer knowledge of practical nurses promotes the planning of the care based on customer needs. So those changing responsibilities of nurses and practical nurses are expanding object in the moral-ideological dimension.

**System developmental dimension: Developmental potential of home care activity**

The developmental potential is seen in IT systems; these are seen as a tool for customer work: but documentation has some gaps. Extensive documentation would open possibilities to perceive, for example, reasons behind depression. Working in pairs but also common discussions are seen as a way in which to develop the evaluation of the functional ability of customers, care planning and documentation. Those ideas has potential to shape the future of activity, i.e. expand object in the systemic-developmental dimension.

**7. Expanding object of home care**

In the home care team, there is an on-going transition towards comprehensive care of customers with rehabilitative work in which the customer is seen as active. The innovations in the home care team are attempts to carry on that development and expansion of the object. The potential for the expansion of the object is seen in social-spatial, temporal, moral-ideological and system developmental dimensions: Other actors in social and health care, as well as relatives, play an important role in the care of the customer; the idea of the trajectory of care is perceived in the team but also in the network and the boundaries between units; the nurses
and practical nurses have become responsible for care planning and evaluating the functional ability of the customer in addition to merely carrying out practical tasks during home visits. Potential for further developing comprehensive care are seen in IT systems, pair work and common discussions in the team.

The developing object, i.e. the comprehensive care of the customer, is generated simultaneously by top-down renewals and the bottom-up innovations of employees. The innovations developed and implemented (such as IT systems, SAS meetings, different practical forms and notebooks in customer homes) are significant for development of the local home care activity, even though the novelty of those innovations is limited in the wider context (see Ellström 2010). The new home care activity is developing by collaborative innovation in a collective learning process: it is seen in bottom-up development, but also when top-down renewals are adjusted to local activity.

The new object of home care activity, i.e. the comprehensive care of the customer, is developing by innovations and actions in different dimensions but also in various organizational layers. This anticipates the potential for expansion of the object. The next challenge of our analysis is find out how the immediate superior manages and supports collaborative innovation and makes the expansion of the object possible.

References

The working- or the labour activity are one of the most prominent matters in understanding adult human development, when looking into the classical activity theory. But in real life practise there also is another use or understanding of this important activity, meaning the use of working activity as a punishment - as forced labour?

Poverty, non-employability, and "deviant behaviour" are societal challenges that have been addressed historically through various initiatives. These initiatives were meant to prevent “spreading the disease”, social unrest, and unfortunate reproduction. The means included detention, forced sterilisation, and subjectification to lifelong measures of state control. One of these means has been more or less disregarded in a Danish context, namely the phenomenon of deportation. People were sent to America on a one way ticket.

The money for the journey was raised in the local parishes in order to avoid the return of these individuals to the local community from various asylums and institutions of forced labour. The management of the local poorhouses and the local poor law authorities agreed: a return to the community was not desired. The authorities had the right to deny the return to the community because of the nature of “administrative placements”, and because the parish itself was in a position to accept or refuse the release of the individuals. It would frequently be the manager of the asylum or the workhouse that would suggest deportation to America. The question is: how can we understand this strategy? Is it to be considered as deportation per se, or as a way of providing a “last chance”? An act of solidarity or one of ultimate rejection?

Our research focuses on 25 men and two women that were sent to America from the institution of forced labour (workhouse) Saxenboj in Maribo from 1867-1930. Some of these individuals managed to get a life in America. Others returned to Denmark, and some we are not able to track. One of the individuals who managed in America was Charles Luchow. He died in Minneapolis in 1916. Until 1910 he was a gardener, and before that a police officer. He married a Norwegian immigrant in 1886, which was 6 years after coming to America from Denmark. His name in Denmark was Carl August Lüchau, and he was condemned to forced labour in 1878, to be served at the Maribo Asylum and Workhouse. The year after that he served another sentence for begging and excessive drinking. His parish of origin did not wish for his return after served time. The management of the workhouse and the parish arranged for him to go to America on a one way ticket. He was provided with a new set of clothes and a little money. The archives show the discussions leading up to the deportation. The police was part of the collaboration and escorted him to the steamboat in Copenhagen. Lüchau is just
one of the individuals who were deported in a joint venture between the poor law authorities, the police and the legal system.

My presentation reflects, firstly, a historical account of the deported individuals seen from a disability perspective. A large part of the rural population on the Southern Danish island, Lolland, where Maribo is located, emigrated during the mentioned period (the majority to America). At the same time people immigrated to Lolland from other parts of Denmark, from Sweden and Poland. Many persons were needed for farming, but at the same time, the individuals not suited for this purpose had to be pacified and subordinated, forced to work or deported. Secondly, the presentation is a consideration of social history, reflecting on the relationship between the society and the individual. What is the nature of the measures that we implement, past or present, to encapsulate or cast out individuals that are considered dangerous to public safety? How can we explain (and defend), that persons not wanted in Denmark due to their “being a threat” were sent to America with the aid of the police?

The story of the people who were sent to America is full of contradictions and ambiguities that lead to the research questions we have raised: Was there talk about deportation, a last chance, or both? Why was this small handful of people sent off when the vast majority stayed at the poorhouse or workhouse?

The narrative of the Other that can be derived from the correspondence between the institutions different inspectors and the chairmen of the local parish council and the poor commissions are part of a larger story that deals with the general exodus to America from the 1830s until the early 1900s. America is in this period presented, as the country that will give every person who can work a good life. According to the Danish historian Kristian Hvidt it was not only Danish destitute, but also criminals who were send to America with police complicity. In 1868 came the first official complaint from the U.S. embassy in Copenhagen on this issue in connection with a named thief and murderer who was probably paid by the
police to emigrate to America - a case that caused a stir over there. However, practice did not stop. “They continued, which is demonstrated by cases in 1882 and 1887, to pardon criminals for punishment if they would travel to America,” writes Kristian Hvidt. We have compared the records, we were able to find about the individual persons, with records about the place and time just to try and understand what lies behind these “away sending’s” and why these 27 people were sent off to America. And not least what was the idea the “leaders” had in regard to whether the experiment would succeed.

Many different factors contributed to:

- First many people from Denmark emigrated between the years 1866 to 1930. There was a widespread notion that the poor and unemployed people in America could get a new and better life. Especially on Lolland, it was difficult to acquire land for farming for smallholders, and there were particularly high unemployment rates for men, which meant that many from this area of Denmark immigrated to America.

- Secondly, the poor and begging people were seen as a social problem. In 1860 came the “Act on Punishment for vagrancy and begging”. In Act § 1 it is stated that a person who wanders around unemployed, and who cannot demonstrate that he has the means of subsistence or seeking legal profession is regarded as an independent. The punishment for vagrancy was imprisonment on bread and water, but where there were Workhouses the person could be sentenced to six days of forced labor, which was equal to one day’s imprisonment on bread and water.

- Thirdly, people who were sentenced to forced labor, but who had violated the rules in a asylum, is placed in “Institution” without judgment. They were administratively placed in the institution by the administrative authorities, which then also could determine when he once again could be released. It seems like the parishes did not want difficult people released, but that they were willing to get those shipped to America or Canada equipped with a single ticket.

- Fourth, did the institutions inspector have a particular interest in these departures or “away sending’s”, since in those (few) cases it was his only option to release a person, but also because he sometimes became concerned about the psychological cost to the individual, the indeterminate sentence had. It seems that the inspector specifically suggested exit for people who the parishes under no circumstances wanted to get released or send home. It was not the mild cases that were “send away”, but typically boozer, maladjusted, violent criminals and people who no one would employ.

- Fifth, it seems to be a united wish among the “poor commissions” and inspectors that have reinforced the trend. Parishes wanted urgently to be excused from an everyday problem that was financially stressful. The inspector wanted to discharge the most difficult. Over time there evolved routines in the area with the inspector as the driving force. The amounts for the journey were typically collected among residents in his home parish.

- Sixth, there was in the Penal Code of 1866 a notion that ”unworthy” poor, that could
work, but did not, were the only one to blame. Since the Penal Code of 1866 was replaced by a revised penal code in 1930 there were a change to the crime etiology. The concept of "fault" was replaced by scientific explanations for certain deviations.

- Seventh, it is worth to notice the way these “away sending’s” were verbalized. The rhetoric about the people changed when their departure was decided. From focusing on negative behavior the focus now shifted to bodily strength and physical work abilities. The story of a deviant person at the Institution blend into the story of what is required of an emigrant who have to live under different conditions in a foreign country. "He possesses a rare strong body, strength and endurance and is use to live with only little comfort", this was written about the 27 year old Hans Peder Olsen from Saxkjøbing parish as an argument for his suitability to be sent to America. The idea was that life in America demanded something else of those who emigrated, than what was required in Denmark. They people who were sent away had something that could be an advantage when you had to live in a foreign country.

One of the central questions in this study is whether or not the persons leaving for America and Canada was deported or given a second chance. There is no doubt about that both the parish council and the inspector wanted to be free of the financial and behavioral problems, as each “away sending” represented. But there were also a perception that it might be possible for the individual to “pull himself together” in a new environment, where they were left to themselves, and that America might need other behavioral traits than what was norm in Denmark. Although there was formulated hope the individual’s change in behavior, it was not discussed whether “away sending” to America was a professional and ethical procedure. It is of course debatable whether it was better to stay indefinitely in the Institution than being “deported” to America. Was it more humane to have continued institutionalized than being “away sent” to a possible comedown? The answer to that question depends on how it went each on in life. We only know little about that. Of the 27 who were sent off, turned seven back to the Institution. What happened to the other, we only have scattered knowledge about through postcards and American archival collections that we have accessed via a Danish historian Henning Bender. Some seem to have done okay, but for most there is no information. Legally it may be questioned whether the Penal Code of 1866 was a condition for the 27 persons “away sending’s” to America and Canada, because the Penal Code looked upon the individual as one who had his free will to choose “good over evil”. Or did it in the Penal Code of 1930, with its more humane and diagnostic view of deviant behavior; became the other way around so that it prevented the individual from that opportunity? Or is deportation a phenomenon that at all times could take place just like the Norwegian historian Lars Borgesrud advocates. For the latter speaks that Denmark respectively in 1911 and 1921 created the “island institutions” for what was called “morally retarded men and women”, and these institutions functioned up till 1961. Here it was not a deportation from Denmark, but a deportation of people within Denmark’s borders who didn’t have the ability to keep a job. The
people who were “admitted” on the “island asylums” were regarded as suffering from a particular diagnosis, which also gave a prognosis of their future behavior. The conclusion was that they could not be left to themselves, but should be under constant supervision of the “asylum system”, which meant placements indefinitely. If the deportation idea were both a former and contemporary phenomenon, then a contemporary issue would be how we as a society treats those that are currently perceived as financially burdensome and behaviorally difficult. Are they treated ”deportativt” and if so in what way are they placed outside the community?

In our research on the persons who in the period 1866 - 1930 was seen as undesirable in Denmark and was sent away to America, we find following patterns:

- The (few) people who were sent away from the Institution were seen as the most troublesome.
- There was an economic incentive to the “away sending’s”, but also a behavioral.
- The “away sending’s” solved a everyday problem for the parish and the inspector.
- Ethical issues related to the “away sending’s” were hardly discussed.
- The rhetoric used in the letters on the “away sending’s” were expressed in human terms.
- The professionals disclaimed any responsibility for the fate of the “away sent” once they were sent off.

**Photos:** From inside the yard of the asylum 1920. The asylum 1930. Part of a picture. The priest, the inspector, the guards and some of the people in forced labour. Around 1890. Saxenhøjarkivet
References


Brinkmann, Svend (red.) *Det diagnosticerede liv. Sygdom uden grænser* Forlaget Klim, Aarhus.


Kolstrup, Søren (2010) i Jørn Henrik Petersen, Klaus Petersen, Niels Finn Christiansen (red.)(2010): *Dansk Velfærdshistorie bd. 1, kap. 4.* Syddansk Universitetsforlag.


A Nordic perspective in theoretical analysis and methodological
Colliding concepts of activity: How to make sense of production supervisors’ changing work

Introduction

Changes in business organizations derive from the need to survive, adapt or grow in the turbulent and intense competition, which requires constant development of more innovative production and service concepts. From the standpoint of interventionist research the question is how to get hold of these wide-ranging transformations occurring in work organizations, i.e. how to operationalize and analyze change in a way which enhances adequate consistency of the developmental efforts. In this paper we describe how organizational change was analyzed during an intervention process and elaborate the usefulness of the notions of activity concept (e.g. Virkkunen, 2007; Seppänen et al, 2011) and asynchrony (Launis & Pihlaja, 2007), which were employed as mediating concepts to generate a more systemic view on the on-going change.

Our case study takes changes in production supervisors’ work as a ‘window’ to examine the transformations in a manufacturing facility located in Finland. The data, which consisted of, for example, interviews and a developmental intervention, was collected in a post-acquisition transition phase, during which the factory - with its over 200 years of industrial history - was adapting to its new life as a business unit of a global industrial corporation. Based on the data, the renewal of many organizational procedures combined with simultaneously growing economic pressures had blurred the division of labour and caused tiredness, especially among supervisors. We analyze how the practitioners from the so-called support services of the organization – that is from human resources, occupational safety function and occupational health services – conceptualize the supervisors’ changing work.

Supervisors are viewed here as the internal clients of these support services. The working hypothesis for the intervention was that in order to serve supervisors better, the practitioners in support services need to understand the practical and evolving challenges in supervisors’ operational environment (for client understanding in service networks see Seppänen et al, 2012). As a first step of our analysis we examined how the practitioners described supervisors’ role, main tasks and challenges to perform accordingly. In this paper we present the preliminary findings of this analysis and outline the theoretical starting points of our study. The results are discussed in more detail in a forthcoming article.
The need to analyze asynchronous development of activity concepts

The term “activity concept” refers to a certain historically developed logic according to which production and/or services are organized to meet different societal needs (Virkkunen, 2007). It defines, for example, the financial principles, technology, division of labour, and management system of a particular production entity (Launis & Pihlaja, 2007, p. 605). The activity concept of a firm is, thus, a unique, locally formed socio-material system, which at the same time is bound by the general technological development and the economic situation. Victor and Boynton (1998) have presented a model of the historical types of production, which evolve from craft, through the phases of mass production, process enhancement and mass customization to co-configuration. According to this model, each historical productions type is based on specific principles of producing goods and services to the market.

Transformations in activity concepts may occur within the predominant type of production or they may be transitions between them (Virkkunen, 2007, p.160). Within a large corporation the local activity concepts can also develop asynchronously. This particular aspect is present in our empirical case: Within the multi-layered corporation in question, each business line, business unit and department follow their own path of development. Similarly, the support services (i.e. human resources, occupational safety function and health services) are affected not only by the changes within the corporation but also by the developments in their own field of practice. Our case study provides a snapshot of a change situation, in which various functions and actors influence each other from the point of view of their own stage of development. In our intervention, we aimed at developing methods for analyzing the systemic nature of these kinds of change situations with a specific focus on work-related well-being (see Launis and Pihlaja 2007).

The intervention followed the ideas of Launis and Pihlaja (2007), who studied the simultaneous changes in activity concepts and in workers’ manifestations of work-related well-being in two Finnish organizations relating their observations to the historical types of production. This way they identified interesting asynchronies in the change process: Shifts back and forth between different activity concepts at different levels of organization created disturbances and discontinuity that were experienced as frustrating and tiring, and consequently lowering productivity. They maintain, however, that asynchronies cannot be avoided in change situations. Thus, they emphasize the necessity of systemic level interpretation of changes in organizations, which requires new, dynamic tools and models.

The data

The intervention phase lasted one and a half years and provided a rich set of data in the form of interviews, on-site observations, three audiotaped workshop sessions, seven audiotaped planning meetings of the workshops, and organizational documents. The participants of the
workshops consisted of representatives of different support services as well as supervisors from two different production departments of the factory. The overall aim of the workshop sessions was to jointly analyze the on-going change. In the planning meetings the main goal of the researcher-interventionists was to prepare the themes and working methods for the actual workshop sessions together with the representatives of the support services, but as the practitioners were present, the planning meetings functioned as part of the intervention as well. Our analysis focuses especially on the parts of the data where the support service practitioners discuss and conceptualize the supervisors’, that is, their clients, work.

Practitioners’ conceptions of supervisors’ work

We analyzed the data applying the principles of phenomenography (Marton, 1981). First, the transcribed data of the planning meetings were divided into topic-related episodes, after which the turns of talk concerning supervisors’ work were identified (n= 410 utterances). Secondly, the particular conception types of supervisors’ work were formed: The variation in the conceptions was categorized with the help of the analytical tools based on the Cultural Historical Activity Theory and Developmental Work Research (Engeström, 1987). The analyses proceeded as follows: 1) First we categorized the expressions according to the temporal dimension (past, present, zone of proximal development and future), 2) then the expressions were examined as discursive manifestations of contradictions (Engeström & Sannino, 2011) and developmental innovations, and 3) lastly the content of each expression was analyzed with the help of the activity system model (Engeström, 1987). As an outcome of the analysis four conception types were formed: supervisor as 1) a master, 2) a tool user, 3) a coach and 4) a “managing director”. These four conception types revealed qualitatively different kinds of explanation models that the practitioners used in describing the challenges and solution ideas concerning supervisors’ work.

Preliminary findings

In developmental interventions that cross organizational boundaries the question seems to be how the participants, who primarily pay attention to the everyday disturbances within their own activity systems, find a motive to go beyond “their own agenda” and reconceptualise change in wider organizational context and in a more systemic way. Based on our initial findings the notion of asynchrony is a promising mediating concept in reflecting the organizational change. However, the process of adopting and using such a concept in an intervention context should be studied in-depth: How the concept of asynchrony is used and how its adoption may expand participants’ notions concerning the on-going change. In our study we used supervisors’ work as a window to study changing activity concepts. Accordingly, the first
step of the analysis focused on studying practitioners’ conceptions of supervisors’ work. In our forthcoming article we will elaborate further on how we anchored these above mentioned conception types of supervisors’ work to the analysis of the changing activity concepts. We also demonstrate how we tracked the indications of the usability of the term asynchrony in this intervention context.

References


Mediating acts and systemic performance

Working practices rather than purpose or instrumentation defines workplaces as individually-motivated or systems-controlled units of analysis. This study covers interview data related to employees’ experience of religious work in spiritual home organizations. Methodological consideration applies for comparison between concepts, models and approaches. Results on religious workplace characteristics emerge from applied activity theory and literary analysis. Religious people perceive of their workplaces as self-controlled, purpose-driven, administratively structured and multi-faceted social scenes. Reported experiences during interviews differ from workplace perceptions. Theories and empirical data make up the functional means for analyzing relations between individual acts and collective activity.

Background

Contemporary workplaces thrive on language use, language in action and situated communication. In narrowing down on relevant issues for activity theoretical research, Daniels and Edwards (2004) plus Martin and Peim (2009) suggest focus on (a) relations between individual acts and organizational practices plus (b) exploration of the ambivalence over conceptualizations of agent (who), action (how) and agency (how). As a result of studies into the interrelatedness between language and action, Enerstvedt (1971, p. 53) says “social action has-contains-reflects linguistic structure”. With the exploration of relations between social actions, shared acts and language follow that on the one hand, singular human acts go beyond and produce natural language. On the other hand, natural languages are personal (autonomous) constructs and collectively accepted (social) conventions. In short, natural languages are functional instruments for defining the limits and impact of singular acts. By studying experiences of working routines, beliefs and environments this text explores dynamics of verbal communication provided by religious informants.

Accounts of routines and behavior in religious settings are problematic concepts to deal with, regardless if the object of study is religious or secular environments. Enerstvedt (1977, p. 61) characterizes religious discourse by believers who reflect their “concrete experience of the world” (italics in original text), e.g. “harmony” between religious purpose and social control. Also, phenomena like employees’ reflection on workplace learning are hidden from direct scrutiny.
For employees in a spiritual organization, fellow citizens expect a specific code of conduct—a given role related to a religious mission. What remains is to construct and apply an analytical filter capable of describing how people experience of their settings, jobs, tasks and working routines by rules and regulations, community plus division of labor (Engeström 1987).

**Previous research**

People have a natural feel for the most obvious aspects of individual (self-controlled) agency and (developmental-evolving) collective phenomena. Lev Vygotsky (1987) emphasizes the impact of agency and cooperation for the development of human activity systems. Kaptelinin & Nardi (2006, p. 11) outlines agency versus structure, saying: “activity theory has always had a strong notion of the individual, while at the same time understanding and emphasizing the importance of a socio-cultural matrix within which individuals develop.” Also, Stetsenko (2005) interprets Leontev’s dichotomization of individual and collective input to human activity.

One interpretation of Latour (2000) is that he suggests studies of the impact-function-meaning of personal initiative (Agency) versus environmentally controlled necessity (Scene). In Referring to Gibson (1966) Greeno (1994, p. 338) says “The term affordance refers to whatever it is about the environment that contributes to the kind of interaction that occurs.” On this note, Asplund (1980) refers to actus by a religious agent by compassionate, helpful, kind and patient behavior. Status on the other hand, refers to systemic efficiency of performance as defined by social roles, for this study by religious US-teachers, Mormon missionaries and Swedish clergymen. But who is the agent, how does s/he act, how do citizens perceive of “religious” action. What do relations between people, setting and purpose consist of and how do people communicate their experiences?

Finding the relevant unit of research, knowledge object or purpose of study is an easy job provided that the researcher focuses on one aspect of a studied phenomenon only. However, Dewey (1910) refrains from explaining how how understood as “method” differs from “by what quality” and/or “by what artifact”. It is a slightly harder task for the researcher (Jackson 2012) to narrow down an empirical study on people’s “why and how of thinking”. Janzen et al., (2011) present a “quantum approach” for identifying influences on human behavior. Their theory consists of how- and what-questions like How does learning occur; Which factors influence learning; What (again) is the role of memory; How (again) does transfer of knowledge occur; What (third time) types of learning are best explained; What (fourth) is the relevance to instructional design; How (third) should instruction be structured to facilitate learning. Janzen’s et al. (2011) questions may seem intuitively relevant, but they are far from sufficient instruments for describing, analyzing and understanding human behavior in e.g. spiritual workplaces.

In a review of general activity theory, Bakhurst (2009, p. 200) holds that second generation CHAT-proponents emphasize motive as a crucial influence on how people (re-)construct their experiences of the world. From a complementary perspective of motivational grammar,

Theory

Burke (1962) expands research by a compound of descriptors provided in response to questions by ASAAP-words like act (how), scene (where), agent (who), agency (by what artifacts) and purpose (why). Interpreting interview data by analyzing religious employees’ answers to questions about workplace dynamics primarily involves Scene (where), Agent (who), Agency (how) and Act (how) because the why-purpose of a particular act/activity is given, obvious, self-evident. Analysis becomes a matter of understanding the ASAAP-categories, how they appear, combine and function. Dickinson (2009, p. 126) says: “The five elements go beyond naming who, what, when, where and why.” In fact, Burke’s parameters make up a framework for generating comprehensive understanding of people’s workplace experiences. Gutierrez (2007) notes the kinship between Engeström’s (1987) “triangular model” and Burke’s (1962) “grammar of motives”. By connecting second generation CHAT with a grammar of motives, compatibility between triangular nodes and analytical ASAAP-concepts emerges.

There is “isomorphism” between Engeström’s (1987) choice of crucial elements like Subject, Object, Objective for describing activity systems and Burke’s (1962) necessary/sufficient categories/elements like Agent, Agency and Purpose. Burke’s framework covers crucial combinations of Scene, Agent and Act; i.e. dynamics between setting, people and behavior. Adding to the potential for analyzing the dynamics of human behavior, Asplund (1980, p. 159) argues that there is a centre of gravity on Scene in Burke’s construct. There are dynamic relationships to explore by means of the formula Act + Agent = (defining) Scene = (producing) Act + Agent. Issues of (in)consistency within and between Engeström’s sub-triangles (production, consumption, distribution, exchange) and Burke’s ASAAP-categories also appear, mainly because the former is theoretically descriptive and the latter becomes verifiable by adding of empirical data.

Analytical approach

Interview data for this study cover workplace characteristics (Scene). Analysis of the religious respondents’ answers uncovers how religious people perceive of their jobs, basically environment, people and behavior. Religious employees provide data by answering questions about setting (where), colleagues (who), individual acts (how) or means (how). They also
supply data for interpreting the dynamics of Engeström’s (1987, p. 78) triangular model, thus enabling for a study of interrelationships between nodes in the small scene sub-triangle production (Subject-Instrument-Object/Objective). The big scene triangles consist of analytical concepts for consumption (Subject-Object-Community), exchange (Subject-Rules-Community) and distribution (Object-Division of Labor-Community). Taken together, small and big scene relations reveal how dynamics between setting, colleagues and acts affect religious employees’ experience of their jobs.

**Method**

Outlining a valid method for analyzing how people perceive of their jobs is a seemingly straightforward task. However, any such endeavor involves analysis of complicated processes. First of all, the familiarity of the concept is deceptive. Second, the very concept needs defining. “How did you manage, operate, control, cope, learn, do it” etc. are everyday expressions, begging for a narrow description of the agent’s input and performance. In defining “doing something” the analyst provides an outline by describing-explaining in what way (how) an agent performs an act. Adverbs like swiftly, carelessly or diligently indicate the quality of such operations. In defining “doing something” the analyst has to provide an outline by describing-explaining by what means (how again) an agent acts by mediating means of physical, mental or linguistic artifacts. During such work the analyst looks for verbs like manage (meeting), operate (machine), control (lever), cope with (resistance), learn (Bible) or do (homework).

There is a need for a model that separates between personally motivated/motivating influences characterized as Agent who Acts on a motive and influencing small Scene. There is also a need for a systemic prerequisite characterized as big Scene influencing Agent to perform contextualized Acts. The first part of Burke’s formula (Agent + Act = Scene) matches analysis of religious workplace dynamics by means of individual initiative, relating to Engeström’s sub-triangles production and exchange (value). The second part of the formula (Scene = Act + Agent) covers systemic-organizational influences, here deployed as matching sub-triangles of distribution, exchange and consumption.

The respondents’ answers enable for a multitude of references, meanings and reflections. On the one hand concepts like Scene-where; Agent-who, Act-how and Agency (how) are clear. On the other hand their use and meaning are “transcendental” and thus subject to interpretation. Furthering the relatedness between activity theory and ASAAP-categories, Burke (1962, p. 317) says human thought and perceptions materialize as linguistic categories: “Instead of calling them necessary ‘forms of experience’, however, we call them necessary ‘forms of talk about experience’.” This contention applies for ASAAP-pentad categories we have to use because their multiple meanings and interpretations is a necessary precondition for higher mental functions and positive development. So everyday use of language claims distinctive functions as to people experience of their workplace, how they feel, act and think. Burke’s line of reasoning motivates ASAAP-concepts, perceptions and/or expressions as prerequisite for analysis of religious work-
Results

In analyzing the respondents’ answers it is reasonable to focus on differences and similarities between Big Scene cultural characteristics in Norway, Latvia and Sweden plus socially controlled Small Scene qualities during the actual interviews. The reason for choosing a combined approach is that learning about the religious respondents’ experiences of big or small Scene experiences forms a necessary component for understanding related elements like division of labor or rules and regulations. For US-teachers the answer to a characterizing question would be “How can you tell if something is wrong in your classroom?” For Mormon missionaries the answer to a characterizing question is “Have you been offered any kind of leadership or in-service training?” and for Swedish clergymen the answer to a characterizing question is “What is leadership like at your workplace?” The respondents mention pairs of relationships between either Scene-Agent or Agent-Act (Asplund 1980), i.e. distribution of attention to the dynamics of production, consumption, distribution and exchange sub-triangles (Engeström 1987). Some answers cover both personal (Agent) and systemic (Scene) perspectives.

Individual action in a close setting

One set of data a person-centered (Agency) trajectory covers small Scene Agent/Act classifications by seven respondents. They illustrate the dynamics of Engeström’s (1987) sub-triangle for production (Subject-Instrument-Object) and exchange (Subject-Community-Rules and Regulations) relative to Agent/Act. Personal pronouns (who) indicate focus on self; you, you, we, we, I, I, I, I, I, we, I. Verbs like notice, learn, happen, do, learn, study, accept, study, attend, accept, learn, meet, discuss and attend suggest personal action in situated arrangements for learning.

Reports on collective activity

A systemic rather than personal, trajectory on a Big scene covers information on Scene/Agent. There are quotes describing a basis for analyzing the dynamics of Engeström’s (1987) sub-triangles on consumption by Subject-Community-Object-relations and on distribution on Object-Community-Division of labor-relations relative to Scene/Act/Agency. References to where, who and what indicate a focus on setting; University of Wisconsin; books; we are encouraged (passive voice), division of labor, performing rites. Verbs like study, apply, work, perform and carry out relate to situated demands on the large public scene and to personal ability on a close scene. In spite of the fact that the students’ questions elicit answers on workplace experiences, references and verbs play a minor part compared to nodes for analysis in consumption- and distribution sub-triangles.

Interpreting the results

Martin & Peim (2009) suggested research on relations between individual acts and organi-
izational practices. In analyzing the descriptive power of a combined Engeström/Burke approach to understanding the dynamics between individual acts and shared activities there are some conclusions. First there are dynamics within and between activity sub-systems. Second, there is a Small Scene perspective on shared experiences of individual job-related tasks. Third, there is a Big Scene perspective on workplace activities and objectives. In answering Martin and Peim’s (2009) suggestion for further research on ambivalences over conceptualizations of agent (who), action (how) and agency (how), one finding relates to the close interview setting operating by/operating on the respondents answers. Interview data by Mormon rather than US-teacher or Swedish clergymen mirror the experienced reality of the close dialogical context. On the issue of individual action and social practices Säljö (2001, p. 111) says it is reasonable to: “talk about the ability to master certain types of skills and discourses under the premises offered by a certain type of institutional practices.” Mormon respondents prioritize impressions of the interview and combine concrete here and now Small Scene influences (Enerstvedt 1977) rather than – as US-teachers and Swedish clergymen do - reflect on de-contextualized Big scene workplace experiences.

Summary

The respondents describe missionary work in concrete terms (Enerstvedt 1977), just like they would if they were to compare the interview situation with the job settings they experience, e.g. when they interpret the Book of Mormon, save people or preach God’s words. However, the data reflect a striking difference between the researcher’s ambition to analyze reported data and the respondents’ preference for adapting to the dialogical format of the interview.

Orchestration of Engeström’s sub-triangles and Burke’s motivational grammar has proven productive. Martin and Peim’s (2009) suggestion for further research resulted in analysis of data generated in close interviewer-interviewee setting; i.e. respondent information illustrating the subjects interactions by Small Scene agency. Analysis also covers the respondents’ reports on management of Big Scene organizational structures by providing information on job-related tasks.

The respondents refrain from highlighting the meditational means (Agency) as well as the overall activity (Scene). On the other hand the respondents employ implicit Purpose and explicit Scene references. They report self-controlled Agent-Act-Agency influences on the quality of production and exchange. This result is in line with Bakhurst’s (2009) definition of (individual or collective subject) motive as the bearing principle for the organizational practitioner and the follower of activity theory equally.
References


Accessed: 1/7/2013 8:06:02 AM at http://www.tcrecord.org


Capital v.2.0- an appropriation of the Bourdieuan concept of Capital to activity theory

Abstract

This paper aims to explore the benefits of a theoretical and methodological appropriation between Bourdieu’s concepts of Capital and activity theory; particularly the Russian strand exemplified by Vygotsky and Leontjev. Bourdieu, Vygotsky and Leontjev have a common denominator in Marx and Bourdieu’s concepts can be seen as an effort to readdress the issues of class and practice, as raised by Marx, in a contemporary light. The claim of this paper is that activity theory will benefit from such an appropriation especially in the more macro and sociological studies of man, history and culture. The concept of Capital will be exemplified through the optic of an educational project in Denmark. The specific intention is to show how the concept of Capital resonate with the theoretical frame of activity theory and how activity theory can benefit from the methods derived from the concept in the bourdieuan perspective. Similarly this paper will propose how a bourdieuan perspective is expanded with the concepts of activity theory adding a micro perspective to the methodology.

What happened to class?

This paper revolves around the claim that Bourdieu has something very important to add to the methodological considerations of activity theory. Bourdieu draws attention to mediations at a macro or class level between man and his objects. In other words to understand human practice and activity at both a general and particular level a concept of Capital is needed. Contemporary research in activity theory is often focused on micro perspectives of how learning is taking place in various settings and how that learning begets various practices; unfortunately often forgetting the heritage of activity theory(Roth, 2004) Activity theory is though much more than a learning theory but an attempt to understand dialectically the relation between subject and object, man and culture and other such fundamental philosophical and quite practical considerations. There is a philosophical line, or thread of thought, from Spinoza to Marx and further from Marx to Vygotsky and Leontiev (Ilyenkov, 1977).
Bourdieu brings that line of thought into his reflexive sociology and constructs methodological concepts to shed new light on the relation between man and his objects and how they structure class and practice. Bourdieu is thus in this paper interpreted and seen as a revitalizer of Marx’s concept of class and bringing it to the forefront through empirical analyses. Bourdieu has a crucial relation in mind in his authorship, which shows why an understanding of practice is interdependent on an understanding of Capital: \([\text{Habitus})(\text{Capital})] + \text{Field} = \text{Practice}\) (Grenfell, 2008). Even though Capital cannot be seen or interpreted without the notion of Habitus and Field, this paper will focus on the relation between Capital and Practice and how Bourdieu’s concept supplements the current framework of activity theory. In other words this is an outline of how to bring capital to the forefront of empirical analyses of practice in activity theory.

The objects of labour in activity theory

Ilyenkov writes, in an elaboration of Hegel, about the relation between forms of Capital, which is very similar to the conceptualizations proposed by Bourdieu:

“Just as accumulated labour concentrated in machines, in the instruments and products of labour functions in the form of capital, in the form of ‘self-expanding value’, for which the individual capitalist functions as the ‘executor’, so too scientific knowledge, i.e. the accumulated mental labour of society functions in the form of science, i.e. the same sort of impersonal and featureless anonymous force. (…) He does not think here as such – Knowledge, which has taken root in his head during his education, ‘thinks’.” (Ilyenkov, 1977, p. 79)

Capital is frozen or sedimented labour. In the physical or pure economical form it can be money, products, commodities and in its mental form it is various forms of knowledge and education. In other words the logic of Capital is metamorphosed into other areas of human activity and very much above and beyond the field of economics and money exchange.

This doesn’t mean though in Ilyenkov’s or Marx’s sense, that an investigation of forms of Capital must solely be in ‘general terms’, the particular historic investigation of forms of capital is both general and particular in the same movement.

“The essence of human nature in general can only be brought through a scientific, critical analysis of the ‘whole ensemble’, of man’s social and historical relations to man, through concrete investigation and understanding of the patterns with which the process of the birth and evolution both of human society as a whole and of the separate individual has taken place and is taking place.” (Ilyenkov, 1977, p. 117)

Bourdieu’s conceptualizations and methods is similarly constructed to address both the particular and the general level of investigation, though concrete sociological analysis of sedimented labour or commodities, both in physical and mental form.
Bourdieu’s overall conceptualization of capital is very similar to Ilyenkov/Marx:

“Capital is accumulated labor (in its materialized form or its ‘incorporated’, embodied form) which, when appropriated on a private, i.e. exclusive, basis by agents or groups of agents, enables them to appropriate social energy in the form of reified or living labor. It is a vis insita, a force inscribed in objective or subjective structures, but it is also a lex insita, the principle underlying the immanent regularities of the social world.” (Bourdieu, 1986, p. 1)

Only through an analysis of capital in its expanded form can one get an understanding of the social world:

“It is in fact impossible to account for the structure and functioning of the social world unless one reintroduces capital in all its forms and not solely in the one form recognized by economic theory.” (Bourdieu, 1986, p. 1, my emphasis)

To summarize the object of activity is of course a mediated one and often a tool, but in the same dialectical movement it is a product of labour and ultimately a form of Capital. To forget the Capital ‘inherent’ in the object of thought, and that thought itself is a product of mental labour and Capital, and the subsequent practice will in other words be to forget the lesson of Marx.

**Bourdieu’s forms of capital**

Bourdieu proposes three forms of capital 1) Economic capital 2) Cultural capital 3) Social capital – they are of course interrelated and Bourdieu has a notion of transubstantiation between the various forms.(Bourdieu, 1986). These forms of capital are akin to Ilyenkov’s conceptualization both general and particular at the same time. For instance the educational level could be an indicator of a portion of the cultural capital, similar to Bourdieu’s analysis in Distinction (Bourdieu, 1984), but only if it is recognized as such in the relevant field. There is an intricate relationship between the three forms of capital and only through micro studies, observations of practice and analyses of the particular institutions can one get a glimpse at the forms of capital available in the field. To give an example of an outline of an investigation the emphasis will in the following be cultural capital related to a specific type of institution (gymnasiums in Denmark) and related to a specific subject matter (science).

**A study of cultural capital and its differentiation**

Bourdieu proposes that cultural capital has three states: 1) The embodied state 2) The objectified state 3) The institutionalized state.(Bourdieu, 1986). These three states are an important addition, and not a direct break, to the traditional learning focus of activity theory:
“This starting point implies a break with the presuppositions inherent both in the commonsense view, which sees academic success or failure as an effect of natural aptitudes, and in human capital theories.” (Bourdieu, 1986)

A study of learning is thus, in this paper view, similarly a study of a particular cultural capital enacted through a particular class Habitus. To solely focus on the learning aspect will thus disavow that learning is not a neutral process, but should always be considered enmeshed in a dialectic of specific cultural structures – often reproducing the outcome.

If one was to examine for example why there is a problem with uptake in the natural sciences in gymnasiums in an outlying region of Denmark the above considerations must be taken into account if one was to propose a dialectical material approach to the problem, and in particular one oriented towards activity theory. One could propose that the problem is related to the specific learning in natural science, and that is why the students aren’t interested or motivated to choose science as a career or educational trajectory. Such a focus on learning could overlook the structural circumstances and conditions inherent in the acquisition of cultural capital. The choice of a career in science should carefully be examined through the learning conditions within the classroom/laboratory and similar micro settings of specific practices.

These practices will have ‘tell-tale-signs’ of the various manifested Habitus and Cultural Capitals thereby grounding Bourdieu’s macro conceptualizations regarding class and practice. In the same investigation it is though necessary, keeping in mind the lessons of Marx, Ilyenkov and Bourdieu, to examine a general structural view. In this general view cultural capital is seen as a product of family/class conditions or in other words the ‘lay of the land’ surrounding the gymnasiums. In other words a socio-economic analysis coupled with an analysis of cultural capital akin to the ones exemplified by Bourdieu (Bourdieu, 1998; Bourdieu & Passeron, 1990; Bourdieu, 1984)

An overall analysis should thus at least contain: A) A micro perspective - an analysis of concrete learning practices in the classroom – manifested Cultural Capital and Habitus. B) A macro perspective examining the structures surrounding the institution, family or similar larger structure – an assemblage of various manifested forms of Capital.

Cultural capital is desired to be equally accessible to all, but unfortunately desire on a political level or economical level isn’t the same as equal opportunity on an institutional or personal level. The analysis proposed in this paper, an appropriation of Bourdieu towards activity theory could thus be seen as an attempt to readdress the issue of Capital and Class in particular and general educational settings. In other words an attempt to steer activity theory and analyses of learning back to the concepts of Class and Capital and the original emphasis of inequality proposed by Marx.
References

Abstract of the Lecture

The lecture will discuss four topics:

First: Some problems concerning terminology and concepts are briefly mentioned.

Second: The roots of the activity theory and the cultural-historical school are described. It is common in Western Europe and in the United States of America to regard cultural-historical psychology as the main basis for critical psychology and to regard both as identical with the activity theory. The lecture will regard this point of view as a question at issue, a very serious question. In most of the literature on cultural-historical psychology and activity theory in Western Europe and the USA, the only school referred to as the historical source is the Vygotskian school. In the former Soviet Union, however, there existed another school of activity theory, namely that of S. L. Rubinstein (1889-1960). The lecture will put forward the hypothesis that the sole reference to the Vygotskian school is an unproductive confinement of the activity theory.

Third: The lecture will discuss some fundamental theoretical-methodological problems in the theory of activity, mainly the controversy Rubinstein – Leontjev on the question of internalisation, the theory of internalisation.

Fourth: The relation of a dialectical theory and the activity theory is described and a model of the individual and society as activity is presented.

Introduction

The Terms “Critical Psychology”, “Cultural-Historical Psychology”, “Cultural-Historical School”, and “Activity Theory”

In western Europe and the USA miscellaneous psychological currents developed with different basic terms and concepts, like activity theory, critical psychology, cultural-historical psychology, cultural-historical school. This development was a part of a broad liberation movement (key word: 1968). On the one hand, the different basic terms and concepts demonstrated a productive variety and diversity. On the other hand, we communicate much
more easily in our everyday lives when we use the same words for the same concepts. This semantic agreement is required in order to enable the scientific discussion and cooperation necessary for the development of a research community and a research tradition, such as we are attempting on the basis of the ”activity theory”. A common vocabulary is thus a prerequisite to the achievement of a more highly developed scientific level enabling the rise and successful implementation of a new paradigm. We of course use different words for the concept of activity in different languages. But the crucial question of translation then arises. ¹

The word “activity” in English is a very general term. There are many conflicting activity theories. In that sense, the term is unfortunate. The German word “Tätigkeit” is the word “doing” in English, but that term was embraced by Dewey’s pragmatism, c.f. his work “Learning by doing”. In the Scandinavian countries, the term for nearly all of us is the word “virksomhet”. However, for some researchers working on that theoretical basis the word is “aktivitet”. In this lecture I will discuss the theoretical implications of some crucial words and concepts – for example, “activity theory”, “cultural-historical school”, internalisation, interchange etc. - and argue that they contain different approaches and understandings in our common scientific community. In Scandinavia, we fortunately also have the word “aktivitet”, (English “activity”). I use that word to denote life, i.e. life is activity, not only movement. When I use the word “virksomhet”, it means the special activity of humans. The theory in Scandinavia is termed “virksomhetssteori”, and I propose that we should use that term, not “aktivitetsteori”.

The Roots of the Activity Theory and the Cultural-Historical School

Marx’s Feuerbach Theses

I will start with Marx (1818-1883). This connection is well known. It is, however, important to emphasize that there are two important interpretations of Marx: The structuralist one, for example, “the logic of capital”, the human subject as an object of capital. The other interpretation also emphasizes the subject in capitalism, the creative, active personality in suppressing conditions. A key word: The Feuerbach Theses. By changing the world, his surroundings, a person changes himself. The last interpretation of Marx is the foundation of the activity theory.

The Origin of the Activity Theory and the Cultural-Historical School

No one refutes the proposition that the activity theory and the cultural-historical school originated and were first developed in the Soviet Union. But by whom?

¹ Enerstvedt (1988).
The Marxist Theory of Psychology in the Former Soviet Union

The Vygotskian School of Activity Theory

The Vygotskian school emerged in the 1920s. This was not a homogeneous, institutionalised school. It was more like miscellaneous and temporary cooperations among researchers. On this basis, however, close teamwork developed – that of Luria (1902-1977), Leontjev (1903-1979) and Vygotsky (1896-1934). The three psychologists, who, by the way, labeled themselves as a “troika”, often met and discussed fundamental problems of psychology – perception, mind, memory, language, etc.

The main achievement of the Vygotskyian school, or cultural-historical psychology, known in German as “die Kulturhistorische Schule”, is its emphasizing of the social determination of human beings. That meant also a new understanding of human biology, human nature.

A methodological hallmark is also the highlighting of the important so-called interiorization or internalisation process. Everyone can experience this process every day. The best example from my own experience is when I learned to drive a car to get a driver’s license, an experience I think all persons with a driver’s license can confirm. When the driving instructor and I arrived at the first intersection, where I was to simultaneously look to the right and left while clutching, shifting, and braking, I was certain I would never learn to drive a car. Every little act was extended and conscious. But as you all know, in a relatively short period of time all those conscious acts were internalised and became unconscious mental operations – looking, clutching, gearing, braking, navigating. The pattern is activity with a motive leading to outer actions structured by goals and accomplished by operations which are internalised to the mental operations.

The Rubinstein School of Activity Theory

The other tradition is the school of Rubinstein. Already in 1922 he spoke of the principle of creative spontaneous activity and then – the principle of unity of consciousness and activity. Rubinstein created innovative psychological theories of personality, thinking, emotions, memory, speech as processes, i.e. activities. His most famous proposition is that outer, external impacts, incitements, have an effect via internal conditions, processes. The external operations are refracted by inner processes that constitute the foundation of development.

The most important achievement by Rubinstein and his followers (Brushlinski, Shorokova, Budilova and others) was the understanding of the relation human being – environment as interchange (Wechselwirkung, vekselvirkning), interaction. This interaction is the activity, i.e. the activity is interchange, interplay, interdependence, interaction, intermediation. Rubinstein refutes both the thesis that the development of an individual exclusively is determined by external influences, and the thesis that this development exclusively is determined by inner conditions.

---

2 An example similar to that from my own experience is also referred to in Leontjev (1974-1975).
3 Cf. also Rubinstein (1968), p. 115, on the unity of consciousness and activity.
The Emergence of Critical Psychology (also labeled in other terms)

I will not present a chronological historical development of the activity theory and cultural-historical psychology in Europe and the United States after 1945. Soviet psychology is the legacy of European and US currents and movements, but when we study these currents, we make a strange discovery. We have presented the two great traditions in Soviet psychology of activity theory and the cultural-historical approach. However, only one of these traditions seems to be the foundation of the activity theory and the cultural-historical approach in Europe and the USA. I have scrutinized many books, articles and entries in encyclopedias. With very few exceptions, Rubinstein is not mentioned at all. An example illustrating all those sources can be the introduction of the entry Tätigkeitstheorie in the German Wikipedia. I quote in my translation to English:

Activity Theory

The activity theory (....) is a psychological theory, developed in the 1930s in Charkov by Alexei Nikolajevitsj Leontjev and co-workers. It is a further development of the works which in the 1920s originated in the context of the cooperation among the psychologists Lev Semjonovitsj Vygotsky (....) Alexander Romanovitsj Luria (....) and Alexei Nikolajevitsj Leontjev, referred to today as the cultural-historical school.

Am I Into Name-Dropping?

So what? Is my insistence on naming Rubinstein merely a manner of name-dropping? Not at all. Vygotsky and Leontjev may be seen as the founders of the cultural-historical school. Sergei Leonidovitsj Rubinstein, however, is the founder of the activity theory. Already in the beginning of the 1920s, he used the corresponding Russian term for activity. His work, “The Principles of General Psychology” (1940), was the first and most basic work in psychology at Soviet universities. From 1948-53, Rubinstein was officially denounced as the first and foremost cosmopolitan (anti-patriot) in psychology and stripped of all his positions. After Stalin’s death, his rights were gradually restored.

The preclusion and exclusion of Rubinstein is a serious mistake and a limitation, a constriction of the comprehension of activity. The reason for this is not a lack of knowledge. The leading activity and cultural-historical psychologists in Europe are conscious followers and successors not of Rubinstein but of Vygotski, Leontjev, and Luria. The reason for this is that they agree with Vygotski and Leontjev in the theory of internalisation and in their criticism of Rubinstein.

For me, personally, this great work of Rubinstein, “The Principles of General Psychology”, brought about a revolutionary change in my understanding, and led the way into the theory of activity.⁵ A long time passed, however, before I became aware of the differences between Rubinstein and Vygotski.

---

⁵ Since I am not fluent in Russian, I became acquainted with this theory in 1968 in the German Democratic Republic through a German-language edition, “Grundlagen der allgemeinen Psychologie” (880 pages).
Some Fundamental Theoretical-Methodological Problems in the Theory of Activity

Leontjev’s Criticism of Rubinstein

A. N. Leontjev (1903-1979) knows the famous proposition of Rubinstein regarding the inner refraction, commuting, and altering of outer influences. He regards it as an attempt to solve the old problem of the stimulus-response paradigm by introducing intervening variables. In short, Not Stimulus-Response, but S-Intervening variable-R. I quote Leontjev:

S. L. Rubinstein expressed this position in a formula, which stated that “External causes act through internal conditions.” Indeed, this formula is quite indisputable. If, however, we include in the “internal conditions” those states evoked by an influence, this formula adds nothing new, in principle, to the $S \rightarrow R$ formula. Indeed, non-living objects also undergo various changes of state as a result of their interactions with other objects: footprints will be clearly imprinted in soft, wet earth- but not in dry, caked ground. This is all the more clear in animals and human beings: a hungry animal will respond to a food stimulus quite differently from one that is full, and a football fan will respond to a report of a score quite differently from a person indifferent to football.

Rubinstein’s Critique of the Internalisation Theory

Now to Rubinstein’s criticism of the internalisation theory.

Vygotsky states that “We call the internal reconstruction of an external operation internalization.” 7 The well-known part of his propositions are as follows (I quote):

An interpersonal process is transformed into an intrapersonal one. Every function in the child’s cultural development appears twice: first on the social level, and later, on the individual level; first, between people (interpsychological) and then inside the child (intrapsychological). This applies equally to voluntary attention, to logical memory, and in the formation of concepts. All the higher functions originate as actual relations between human beings.

In several works, Rubinstein provides a fundamental critique of Vygotsky’s position, refuting the whole theory of internalisation in Vygotsky’s interpretation. In a Russian publication from 1960:

The correct standpoint regarding the question of the social determination of human thinking and the human faculties is in the theory of internalisation overlaid by the mechanical notion of the social determination in this theory. The theory of internalisation tears apart every interdependent connection and every interrelation of the external and the internal, and eradicates every dialectic between the external and the internal, the social and the natural.

---

7 Vygotsky 1978, p. 56.
8 Vygotsky 1978, pp. 56-57.
9 Rubinstein quoted in Budilova 1975, s. 275.
He adds, in the same work:

To „refute“ our characterizing of the theory of internalisation could be argued that according to this theory the internalisation of the external is mediated through the activity of the subject in his acquisition of the external circumstances. This fact, however, in no way abolishes the mechanical character of this view of the personality and the development of the individual faculties, since the subject’s activity itself is conceived as determined merely through the object, merely from the outside.¹⁰

Conclusion

Is Leontjev’s criticism a just critique of Rubinstein’s proposition of interchange? No, I do not believe so. Rubinstein is far from thinking in a S-R, or S-I-R pattern. Vygotsky, A. N. Leontjev, and his son, A. A. Leontjev (1936-2004), go so far as to speak of different approaches to psychology by Rubinstein and the others. A. A. Leontjev (1936-2004), in a discussion with Lomov, states that the one approach could be called the theory of interchange (“Wechselwirkung”), and the other the theory of activity.¹¹ Thus we see that this is a heated controversy.¹²

Is Rubinstein’s criticism of Vygotsky’s and Leontjev’s theory of internalisation correct? Rubinstein is right in his criticism of Vygotsky and Leontjev. He has the deepest understanding of the activity theory. The opposite conclusion of both Leontjevs, A.N. and son A. A., is correct: An internalisation inter-intra is not possible without a simultaneous externalisation intra-inter. Not interchange or activity, activity is to be understood as interchange. The different psychological approaches lead to different concepts of the nature of human beings, and thus also to different humanistic education and pedagogical approaches. The followers of Vygotsky and Leontjev, such as Galperin and others, develop theories of how to succeed in getting students to concur with a solution already found in society (like the approach of Socrates), while the followers of Rubinstein concentrate on leading the students toward posing new questions.

Dialectics and Activity Theory

When, in the beginning of the 1980s, I wrote my doctoral dissertation entitled “The Human Being as Activity”, the main problem for me was to understand the relationship individual-society. The reason for this was that although the Soviet researchers of activity – Rubinstein, Vygotsky, Leontjev, and Luria – were great philosophers, they nevertheless were psycho-

¹⁰ Rubinstein quoted in Budilova 1975, s. 275.
¹² The then (1970s) young Norwegian psychologist, Jan Nordal Høie, succeeded finally – through many discussions - in convincing me that Rubinstein had the deepest understanding of psychological processes. Give credit where credit is due!
logists. They investigated the foundations of the individuals’ minds, memory, perceptions, feelings, brain, personality etc. Society was not and should not be, perhaps could not be, in their focus, cf. their working conditions in the Stalinist Soviet Union. It was no accident that sociology suffered a tragic fate in the former Soviet Union. There was a tendency to regard the individual and society as an external relation. Cf. Vygotsky’s famous thesis. A consequence of this fact is that the problem of the relation between nature and society also could not be posed in a productive way.

Another problem emerged because of the absence of an activity approach to the study of society. While I was giving a lecture on activity theory for students in education, a student asked me: But what about communication? I could not give him an answer. I was not tempted to reply: Communication is also an activity. It is, of course, but there is danger in giving such an answer: Everything is explained by the concept activity, and if activity in a narrow sense explains everything, it explains nothing.

Fortunately for me, I was very interested in dialectics. I published a book on dialectics more than 40 years ago. When I tried to acquire the theory of activity, dialectics was always intrinsically connected to, or an internal part of the theory of activity. On that basis, I always try to understand all phenomena in their contradictory and identical essence. The famous thinker Karl Popper regards dialectics as nonsense because, in his opinion, dialectics is an antinomy, not consistent with the logical law of contradiction. That is not correct, simply because dialectics is the process leading to the logical operations. Process is therefore extremely relevant for the activity theory, while activity also is a process. Vygotsky stresses the importance of a dialectical method when he discusses “Problems of Method” in the book Mind in Society. 13

The Relationships “Individual-Society” and “Nature-Society”

The Question of Communication

In the article “Pedagogy and the Concept of Activity”, published in 1988, I wrote:

The general concept of the relation between human activity and communication is derived from Marx's understanding of the relation between productive forces and production relations. Marx speaks clearly of this relation as a substance-form relation. The productive force is the relation between subject and object in production of goods - the substance. The production relation is the form of this substance, it is a subject-subject relation, for instance as capitalist-worker relation. The question is then, could this conception of the relation between productive force and production relation be generalized also to other spheres of life?

That was precisely my assertion. Not in the sense that all human relations are identical to the production of ”things”. In the sense, however, that all human activities - labor activity, play activity, learning activity - are the activities of subjects towards objects in a subject-subject relation.

13 Vygotsky 1978, p. 60.
Today I would rather say that what I wrote in 1988 was an abduction, as coined by Peirce\textsuperscript{14}, not a generalization. I put forward a hypothesis that all human relations are a substance-form-relation (German: Inhalt-Form) and can — on the individual level as well as on the societal level — be characterized as a substance activity in the form of communication. When I speak of communication (Norwegian “kommunikasjon”) I use this word as a term for both material and ideal interaction. Or stated in another way, communication implies both practical (buses, cars etc.) and intellectual interaction. Most generally, the extension will be the material and ideal cooperation (Norwegian ”samvirke”, German ”Verkehr” – as coined by Marx). The mode of existence of both individual and society is activity as a substance in a communicative form in which objects are produced or used and those objects are nothing else than objectified activity (streets, houses, cars, etc.).

The Question of Individual and Society and the Question of Human Nature

Society sui generis is not outside individual activity. Society is the cooperative, collective activity of individuals. The individual subject and the collective subject are merely different modalities of human activity. Society and the individual must be defined by each other. This also means that human nature cannot be conceived of as unsocial. Human nature, the human organism, is produced in a long phylogenetic development, especially in the anthropogenesis, which is the period in which man in society emerges. Nor can human nature be reduced to ”social” when this ”social” is falsely conceived as something external to the individual. That also means that the social is not internalised into the individual. Both the social and the nature of the human being originate and exist in the interchange, the interplay, from the breathing of the organism to the activity of the personality. The individual is not a closed monad, it is the relationship between an organism and its surroundings. And society is not external to that relationship, but rather is the cooperation of natural individuals of flesh and blood.

The inner relations of nature, society, groups, individuals

\textsuperscript{14} Peirce (1997).
Human activity - as individuals and as society - is a relation between special natural organisms and a particular environment. The mode of existence of both the individual and society is activity as interchange. The best way of understanding those relations is Rubinstein’s theory of interchange (“Wechselwirkung”, “vekselvirkning”).

Conclusion: The Model

In the article I published in 1988, I visualized activity both on the individual and the societal level in this way (as a triangle):

![Diagram](image)

The Individual’s and Society’s Mode of Existence

A necessary comment: I am very sceptical of visual models of verbal statements, however, I still like the above model because of its simplicity. A warning though. This is not a model of a dyad, a model of two, it is meant to visualise certain fundamental relations, and there are many Ms. The notion of the dyad as the foundation and the emergence of society, is merely a development of the legend of Adam and Eve, cf. also Engels’s (1820-1895) criticism of Dühring (1833-1921)) in this matter. This legend is unscientific.

My conclusion: We should abandon this either-or thinking, either interchange or activity, and adopt a both-and way of thinking. I put forward the following proposal for a discussion: Internalisation yes – but in the context of Rubinstein. Thank you very much for your attention.

---

15 Enerstedt (1988).
References


Enerstvedt, R. Th. (2011) *Spiller Gud terning likevel?* Marxist Forlag, Oslo


Wikipedia (germ.) [http://de.wikipedia.org/wiki/T%C3%A4tigkeitstheorie](http://de.wikipedia.org/wiki/T%C3%A4tigkeitstheorie)
Appendix

*Brief comments to the introductions of some entries in the lexicon Wikipedia.*

**Critical psychology (entry in Engl Wikepedia)**

“Use of the term "critical psychology" started in the 1970s in Berlin at Freie Universität Berlin. “ In this entry they correctly state that Klaus Holzkamp might be considered “the theoretical founder of critical psychology.” Correctly, in this entry: “Holzkamp mostly based his sophisticated attempt to provide a comprehensive and integrated set of categories defining the field of psychological research on Aleksey Leontyev's approach to cultural–historical psychology and activity theory.”

**Kritische Psychologie (entry in the German Wikipedia)**

In this entry Holzkamp is correctly emphasised. However, in this article we also find no reference to Rubinstein, merely to Leontjev.

**Cultural-historical psychology (entry in the English Wikipedia)**

Cultural-historical psychology (also called the school of Vygotsky, sociocultural psychology, socio-historical psychology, activity theory, cultural psychology, cultural historical activity theory, and social development theory) is a theory of psychology founded by Lev Vygotsky at the end of the 1920s and developed by his students and followers in Eastern Europe and worldwide.

**Kulturhistorische Schule (entry in the German Wikipedia)**


Sergey Leonidovich Rubinstein (1889-1960) is not mentioned at all as a founder of the cultural-historical psychology.

**But what about the entries of the English term “activity theory” and the German term “Tätigkeitstheorie”?**

**Tätigkeitstheorie (entry in the German Wikipedia)**

Activity Theory (entry in the English Wikipedia)
Activity theory (AT) is an umbrella term for a line of eclectic social sciences theories and research with its roots in the Soviet psychological activity theory pioneered by Alexei Leont’ev and Sergei Rubinstein.
This entry is, however, not based on the theories of Rubinstein. The article has five references, two of them to Leonjev, no reference to Rubinstein at all.

Leontjev (entry in the English Wikipedia)
Among several names of Leontjev, we can read:
Aleksei N. Leontiev (1903-1979) Soviet psychologist, the founder of activity theory

Rubinstein (entry in the Englisch Wikipedia)
Among several names of Rubinstein, we can read:
Sergei Rubinstein, a soviet psychologist, critic to Vygotsky.
We find no special entry of S. L. Rubinstein, but entries on A. N. Leontjev and L. S. Vygotsky.
Two key assumptions underpin the ideas put forward in this paper which considers the relevance of place and space for understanding an activity system and identifying opportunities for learning:

- places, over time, and through experience influence our sense of self and what we like or appreciate, and
- individuals behave and act in ways that responding to their spatial context or cultural norms, which are historically and spatially produced.

These points, which resonate for me through personal experience, attest to the importance of spatial configurations in social practice and activities. The idea, reminiscent of Gumperz (1982), Foucault (1986) and Bakhtin (1986), among others, is that materials spaces are historically produced locations, with objects and arrangements that play an active role in an activity system, ‘speaking’ to individuals who may take up, resist or transform the identities and relationships that material spaces offer (Vadeboncoeur and Hirst, 2007). Spatial theories developed by human and cultural geographers draw attention to people’s perceptions of places and the habitual experiences with places. Over time, individuals form what I think of as a spatial habitus. This suggests that physical spatial configurations mediate the formation of habitus (Bourdieu and Passeron, 1991). Not simply a one way process, we recognise that individuals and collectives alter spaces and places through their actions. The project described here was a short-term pilot project and did not investigate changes over time has helped me to establish the importance of spatial perspectives within post-16 plans and aspirations for education, training and work. The claim I make is that spatial configurations, both mental and physical, will demand human responses and in this way, places (where we live, go to school and explore) can mediate actions and plans for future actions. Our particular interest in this research is whether and if so, to what extent and in what ways do spatial experiences and representations place demands on young people which influence their aspirations and post-

---

1 Marianne Hedegaard’s keynote at the Nordic ISCAR 2013 conference applied this notion to the study of young children’s learning.
Engestrom’s (1987) model of the activity system is useful in this context given that we know there are multiple factors and people mediating these decisions and aspirations. By including an analysis of the spatial, we may locate places of contradiction, and those opportunities for learning, which are not typically considered. In particular, spatial theories (e.g. Soja, 1996; Lefebvre, 1991) suggest that people can re-imagine (Quinn 2003) spaces in order to facilitate their navigation of confined or restricted spaces, places they would otherwise not ‘fit in’.

**Place, Aspirations and Post-16 Progression in England**

Some researchers in England (where our research also takes place) have recently published reports on the relationship between place and aspirations (e.g Kintrea, St Clair and Houston, 2011; Allen and Hollingworth 2013). The Joseph Rowntree Foundation study (Kintrea, St Clair and Houston, 2011) found that aspirations among disadvantaged youth were high but unrealistic given the employment market in their locality. This suggests a ‘pie in the sky’ mentality and indicates a gap in the planning involved in achieving these goals. The research we are pursuing follows this up by exploring not only young people’s aspirations but also asking about the ways young people navigate the post-16 landscape, where the qualification options are many (Wolf, 2011). We thus asked young people about their career goals and about careers they would consider or not consider, but also how they hope to achieve their goals and what education and training they aspire to. Our pilot project suggests that stereotyped views of career fields are bounded by place and give us reason to believe that the concept of spatial habitus is useful and relevant to an analysis of the activity system which is created by the objective of preparing young people for employment.

The overarching question we have in pursuing this research is: How do young people navigate complex post-16 landscapes, manage their uncertain futures and aspire? Our particular interest has been in how those with troubled academic pasts negotiate these pathways and represent their experiences. We also ask, what role does place and locality play in this process? We explore this spatial aspect because we have found there to be place-based patterns to progression (Payne, 2001) and also have identified a gap in the literature on aspirations and educational progression that can be filled with theoretical perspectives on space and combined with other theoretical perspectives, such as activity theory, communities of practice theory and Bourdieu’s social practice theory.

This paper develops a theoretical framework which will be used in future research that is with a larger sample of young people and is longitudinal. Our aim, as Jeremy Higham and I pursue this research, is to investigate a critical area of social inequality in England -- the progression of young people into post-16 education, training and work. A key premise of this research is that young people’s aspirations and plans for their futures are the crystallisation of factors which include perceptions of boundaries, opportunities, capabilities, self-identifica-

---

2 Activity theory can also help us to unpack these demands by structuring our understanding of spatial demands along the lines of Leontiev’s hierarchy, but that will need to be the topic of another paper.
tions, and horizons for action. These factors, we argue, are potentially mediated by place and spatial representations. In this paper, two key theoretical strands are explored: Third Space (Soja, 1996) and Cultural Historical Activity Theory (Engestrom 1987). The intersections between theory and method are also considered.

Methodology

The data referenced in this paper comes from a small pilot study funded by the University of Leeds, School of Education in order to support the development of a larger research proposal by enabling the researchers to pilot methods and explore relevant theoretical models. The study followed the BERA ethical guidelines and was reviewed by the University’s ethics committee.

As this was a pilot study we wanted to trial a number of methods which we thought would help us gain insights into the ways spatial configurations trigger, relate to or are responded to by young people and to focus on the ways spaces and places may be mediating their imagined futures.

The study recruited 5 Year 10 students from one school. Participants were selected from a list of pupils who matched a set of criteria we gave to the teacher liaison who was also responsible for career guidance in the school. The criteria were set by asking the teacher to identify a Year 10 group of mixed gender, ethnicities and achievement records/expectations for us to select. The participants were chosen at random, stratified to ensure representation from both genders, a mix of ethnic background and higher and lower achievement records/expectations. The shortness of the list meant the selection process, in practice, was a choice between 2 or 3 pupils. Letters of consent were sent to parents of 6 pupils and all but one consented to their child’s participation.

The methods for the project included semi-structured interviews and photo elicitation, as well as versions of photo-voice and card sorting approaches. The interviews aimed to capture a set of narratives of imagined futures and perceptions of opportunity. Card sorting involved presenting the students with names of nearby educational institutions for post-16 education and training written on index cards which they then sorted into piles indicating their interest in attending these institutions in the future: yes, no, maybe, do not know it. (This alternative survey method as suggested to me by Susan McGrath, personal communication.) They were also shown photographs of different career options, a method known as photo elicitation (Wang and Burris, 1997). Photos of places of learning were discussed in a final group interview.3

The students also had the option to take photographs of their locality and were given cameras for two weeks, part of this being over a term break. We explained the study as an

3 The final group interview also involved a mapping activity using DigiMaps software to enable the students to annotate the maps and indicate the areas of the city where they lived and tended to go. This mapping activity is not reported here due to limitations the approach. The pilot experience made clear the difficulty of using internet-based software given time limitations and the need for us to rethink the way we gather this data.
exploration of places that they go, what these mean to them and the places they imagine learning and working in the future, after age 16 when compulsory schooling has ended for them. The digital photos were downloaded and discussed in the individual interviews. In some cases, the student was afraid to bring the camera home and took pictures only at the school, or neglected to take it when they went out and thus took very few photos. Others took several photos and their discussions and images form a key part of the analysis presented here. To protect anonymity, all names are pseudonyms and the students were told to avoid taking photos with people’s faces visible and hence also identifiable. A formal interview with the teacher, which has not yet been completed, provides another perspective on the opportunities and progression pathways available to the young people in our sample. Documents such as the school newsletter were also collected and provide data that helps to situate the claims and experiences of the young people interviewed for this research.

Analytically, the aim was to compare and contrast the spatial representations with their perceptions of opportunity and their intentions for their futures. The analysis was framed by the theoretical framework which combined concepts from CHAT with theories relating to spatiality and semiotics.

Theoretical Framework

Cultural-Historical Activity Theory (CHAT) provides a structure to the framework, while theories about space and place provide a more ephemeral element to the lens through which we examine aspirations and post-16 intentions with regards to education and work. Activity theory is used to focus on the historical, cultural and structural dimensions of the ways young people experience their progression through education and the factors that shape their choices and pathways post-16, while the spatial theories focus on the spatial influences which penetrate various aspects of this activity system and the practices of young people. The activity system of interest is the system in which the object is ‘setting goals for future education, training, career and/or vocational pursuits’. The subject is ‘students who are in Year 10, the penultimate year of their compulsory schooling’. The activity system includes the typical practices, mediating artefacts and rules associated with this objective, such as the careers guidance offered by the school and the rules of the educational system which uses assessments to inform a student’s progression pathway. The question we ask is, to what extent are place boundaries and perceptions of space implicated in this activity system – do they also mediate actions and activities within the system? How can we best conceptualise this relationship between place, space and aspiration?

The concepts from activity theory used in this analysis are: mediation and object-oriented activity. Although we recognise that there is a system of mediating nodes, including the (collective) subject, mediating artefacts, rules, community, division of labour and the object (or goal), the focus is on the artefacts which can be considered conceptual tools and signs or semiotic systems that mediate the objective of crystallising a goal for the future in terms of education and employment. The ‘triangle’ (Engestrom 1987) will be presented to the teacher
as a way to elicit a structured account of the activity system in which the young people are acting and interacting in the process of identifying their post-16 education, training or work pathways. Upon completion of data collection, a more thorough investigation of the activity system and contradictions within that system and across systems (see Figure 1) will be possible. In future iterations of this work, we may use the ‘triangle’ with the young people as a way to develop new ways of organising the activity system and spatial configurations.

The notion of sense-making is particularly relevant to this activity system and we draw upon notions of identification and learning from a ‘communities of practice’ framework to expand on this process in relation to the object in this case – setting future goals for education and employment. The idea taken from Wenger’s (1998) social learning theory is that people go through the world managing who they are to become, and what ‘communities of practice’ they will or will not be accountable to. The young people, it is assumed, will make decisions on their future based on the degrees to which they identify with different ‘communities of practice’ and places.

Hodkinson, Sparkes and Hodkinson’s (1996) notion of a ‘horizons of action’ allows us to conceptualise these imagined futures, and the spaces in which they negotiate their future options and make decisions about engagement, as bounded. The study thus focuses on boundaries. The boundary object which is investigated in this study is the socially and spatially configured ‘space’ in which young people consider their future options.

To pursue our guiding question (see page 1), the analysis focuses on the socially and spatially configured ‘spaces’ in which young people consider their future options. For this, we embrace Lefebvre’s trialectic notion of space (cited in Soja, 1996) as:

a) spatial practice or ‘perceived space’ – investigated through visual methods depicting ‘lived experiences of space’,

b) representations of space or ‘conceived space’ – investigated in terms of their ‘conceptions of space’ focusing on how they conceive places of learning and career possibilities,

c) spaces of representation or ‘Thirdspace’ – approximated through places imagined and explorations of spatial boundaries they have appropriated and also are prepared to transgress, resist or avoid.

Perceived spaces are understood to be the outcomes of experience and hence best captured through narrative, as described above, while conceived spaces are understood to be grounded in spatial knowledge and hence best captured through a semiotic analysis (mediated by the media of the photograph). The images facilitated analysis and discussion of the representations of signs and meanings of signs as they are understood by participants (e.g. what the signs or semiotic system characterising a place represent to them). Our investigation of Thirdspaces is more exploratory given their ‘limited knowability’ (Soja p. 68) and hence are the focus of this paper in terms of the data collected. That is, we explore the ways the data can tell us about Thirdspaces and what data may be collected in the future to better explore Thirdspaces. Our interest is in how space and place interact with or mediate the activity systems of young people and how they (implicitly or explicitly) establish boundaries to those
activity systems which are object oriented, we also employ the notion of an activity system. These different ways of talking about ‘space’ can be mapped onto the CHAT framework as represented in Figure 1.

![Figure 1]

This figure is my attempt to integrate these two theoretical perspectives in relation to our topic of post 16 progression. It is meant to be 2D so in one dimension, the brown triangle, you have lived experience which is theoretically all past experience. The yellow triangle represents the present and the research interview in particular as an instance of self presentation (pupil) to another (researcher) in regards to their imagined futures and who they are more generally. In this activity system, it is the spatial tools which they use to present themselves and their futures that were our focus. Using Soja I map perceived space as a tool mediating lived experience and conceived space as a tool mediating narrated self presentation, but I propose that these first and second spaces are dialectically related and intersect in Thirdspace (Soja, REF) which is where boundaries are drawn or transgressed, and it is these Thirdspaces that inform outcomes in terms of progression post’-16. Thirdspaces have ‘limited knowability’ (p.68) and so the interpretations I make here are tentative and open to dispute. Data from the pilot are presented in the following preliminary analysis.

**Preliminary Analysis**

In this analysis, I relate the conceived spaces to the perceived spaces from two participants, Karen and John. The photos are their lived spaces and what they say about them tells us about their perceived spaces. In the interviews, including the card sorting activity, they recounted their experiences of these places and their imagined futures.
Karen
Karen took 6 photos of places she goes and likes. Karen described this photo, her favourite, as ‘the field’. It is where she goes often to meet her friends and is near her home.

She says it is ‘where I’m always like laughing and messing around’. I asked what that was like and she said:

• K: I just feel like kind of me I guess, because, like the past couple of days I’ve just been missing like when I was little I guess …. I just want to be like small again and not have all these stupid things annoying me...all sorts of different pressures, and like, all my school work it’s getting all scary now with all the GCSEs and things...

She says, the field is where ’I just feel like kind of me I guess’. It is a nice place. She contrasts this place with school, where she feels there are ‘annoying pressures’ which she attributes to exams – GCSEs are key qualifications that enable access to further and higher education in England.

The field also contrasts with this photo she took of the city where she lives, a photo taken from the ‘wheel’ which allows for expansive views over the city. She described this as ‘messy’. And although it is looking down on the shopping streets she likes (and notably fashion is her passion), she does not like it. This suggests that spatial configurations are mediating her perceptions of places. But do spatial configurations also mediate her perceptions of places of learning?
The card sorting activity provides some insight into this question. Her responses to different places where she might learn suggest that place does matter.

- K: I probably wouldn’t go to the University of [nearby City]...I don’t really like [it]... Like my mum came like from [there], saying it was horrible... and nobody really likes [nearby City]
- K: Um [nearby city] College seems quite good because [nearby city]’s kind of posh and things.
- K Like my dream dream thing would probably be like to be a singer but that’s so like unrealistic, so I would never even try pursuing that ...just like so many people that want to do that, there’s like a billion chance of me being able to so.

In the final quote above, Karen introduces another mediating factor that was also a theme across her interviews – the likelihood of success (a non-spatial factor).

She also said she did not want to go to a 6th form because this was too much like school, giving her perception of this particular place of learning, and indicating that place does matter.

- K: I don’t want to go to sixth form or just like stay at school because I don’t feel like school has the right things I need, I don’t know why, like cos I don’t even know really what I want to do. I don’t feel like I benefit from it.
- ...Even though it’s sixth form it seems kind of collegey still, like I don’t why but, I don’t know everyone thought it was like really good.

She imagines her future as a fashion buyer, if she can achieve this. Her plan is to apply for an apprenticeship in London. Here, the spatial concerns she has are overshadowed by the desire to be part of the fashion industry.
Karen on London for an apprenticeship:

- K: ...I’d miss all like my family and friends and whatever but I guess you kinda have to if you want to actually be successful, you have to take some like, like I don’t know risks or whatever
- V: Yeah. Yeah. Yeah. Have you been to London?
- K: No, never

These other quotes suggest that her perceptions of places are mediated by her interest in fashion (and a belief that she can achieve this aspiration) so a place like London that may have messy or not so nice parts will be still ok to live in because there will be good shopping and it is known for fashion as she indicates in this quote:

- K: It seems amazing though, I’d love to live there
- V: What do you imagine it to be like?
- K: I don’t know, just shopping
- V: Do you imagine [London] to be like [home City] at all?
- K: Um. Not really, I guess. I think I probably make it out to be some amazing place and it’s probably rubbish if I go. Like it’s like certain parts because some parts of London are horrible

This passion and the overall goal of being a fashion buyer in the future also overshadows her reflection on entry level jobs in the industry, such as store sales person, being considered ‘boring’ by others. For example, she described her work experience at a clothing store, where they were having a sale and she says ‘had to like sticker all the things, which seems really boring but I strangely enjoyed it’.

From quotes like this and others, I interpret Karen’s third space seems to be bounded in relation to perceptions of ‘messiness’ and ‘poshness’ and status (where status is based on perceptions she but also others have of the school or place). There is a sense as well that what feels comfortable and safe to her is that which feels familiar. For example, ‘the field’ but also her career choice of fashion buyer, which was a career her father had considered previously. She also prefers to avoid pressure situations, which I interpret to be instances in which the criteria for success seem arbitrary or unclear. This is based on an earlier comment in her interview about her uncertainty about the upcoming ICT exam as well as the comments about GCSEs and a career in singing (reading between the lines). The career of a fashion buyer has a clearer route in her mind, informed by a book she read (which her dad had bought when he was considering this career move) and her mom’s friend who is a fashion buyer in London.

Karen is open to possibilities but approaches them with some fear and concern for risk. Her passion for becoming a fashion buyer now drives her plans for education and training, but she wants to keep her options open for university studies as well. It would seem that for Karen to
have a similar drive towards university studies, she would need a clear understanding of the criteria for entry and to develop some familiarity with the institution.

**John**

John provides an interesting contrast to Karen, a contrast that highlighted for me the notion of a spatial habitus can mediate imagined futures. Interestingly John also chose to take a photo of a view from above -- this is from his window at home and looks into the woods. He calls this photo ‘a view that I like’.

![John's photo of a view from above](image)

It is not a photo of a place he goes, the woods are his simply a view for him. His choices of representation of places he goes are interesting and suggest a spatial habitus that is resistant to boundaries. For example, he photographed his bicycle and told me that he cycles all around the city.
He also to this photo of another place he spends most of his time: his phones.

I thought that taking a photo of his phones as a ‘place’ suggested a very expansive view of place. I take these different representations to indicate he has an expansive view of space that enables him to flexibly enter different spaces.

However, he is also someone who likes familiar places. John’s favourite photo is this one he took of his favourite take away restaurant – a place he goes to almost every day usually with his friend who lives nearby this place. In telling me about this photo, he presents himself as a creature of habit.
John’s photos promoted discussion of his current neighbourhood in contrast to where he used to live. In the process, John introduced a temporal dimension to perceptions of space (Massey, 2005). John described the street where he lived as ‘quieter’ than it was up the road a bit, and even more so, because it was located further from where he used to live and where many other people he knows live, he said he did not have people coming around to visit him all the time and he preferred this. He presents himself as someone who likes to have control over his time, to decide when he sees his friends, which is not all the time.

- J: When you go down my street it’s just a quieter street...
- V: And how does it compare to where you used to live?
- J: Um. I used to like, in [area], most people live there, or not, like most of my friends and stuff and always come ...asking if you’ll come out. But I think it’s better just to do something quiet...Like too many people ...it gets a bit annoying...just people asking you to come out and stuff and always at your door.

The links between his spatial habitus and his imagined future is evident in his choice of careers. John imagines his future work being unbounded by place when he considers two main business ideas – an online business and a mobile bike repair shop.

- V: Are there things you have considered as careers or anything?
- J: I want to be self employed now... Just like running my own business... Something online.
- I know a few people who own a shop type, yeah. I don’t really want a shop....
- J: Thinking far right back, having a bike shop...repair shop...I was thinking about that,
like, I wouldn’t want a shop but something where I have a van and then pick peoples’ bikes up and then fix ‘em and drop ‘em off

- V: Oh right yeah. Why would you, why would you not want a shop?
- J: With you shops you have to pay rent and bills and stuff and it just comes out your profit but online businesses are, have your own, you’re working at home or something you know.

John’s third space seems to be bounded in relation to accessibility but is otherwise expansive and open to possibilities for further expansion. His imagined future is one that does not tie him down to a physical place like a shop but is more mobile and even virtual. His imagined place in the future is tempered by the opportunity it provides for getting around, as is indicated in his response to my question of whether he would consider living in London:

- J: I like London but it’s just too big, you know, to get around and stuff.

His spatial habitus supports his rejection of the educational system, before it can reject him. This is evident in his intention to pursue work after he finishes school rather than further education. He doesn’t rule out colleges and he would consider university, if necessary. However, he does not see it as necessary for what he currently wants to pursue, a job and a business. He leaves the possibilities open by noting that he may change his mind about what he wants to do and therefore may need to go to university. In the card sorting activity, the location of the institutions of learning had not been an issue - if what he wanted to study was at a non-local university he would go there. Thus, his future is not bounded by place but because he has no goal that demands that he moves, he will not invest in that option. This suggests that his goals are the driving factor in his imagined future and decisions. For John, it is not so much about access as it is about practicalities and reasoning based on what seems to be a cost-benefit analysis. For example, at one point in the interview he queries the grade requirements for entry to college. He says: What do you need to get in to college it’s like Cs?’ and then he places the 6th Form College card in the ‘yes’ pile as I say ‘it depends.’ This potential for negotiation and revision of plans seems to me to be a good way to navigate a complex post-16 landscape, but John will most likely need information and guidance on the requirements for the different options he imagines.

**Heidi and Scarlet**

Two other participants in this pilot project suggest another way in which ‘space’ is implicated in the process of progression post-16, based on the assumption that progression is a matter of identifying a goal, determining the best pathway to take (in terms of education or training), and engaging with the activities that will support the achievement of that goal. The relevant data for this exploration is the transcribed interviews. In Heidi’s interview, she told me that her grades had not been good enough to get her into BTEC Art course she wanted, so she was given her second choice of Childcare, but realised she did not like that. She also started a
course in Hairdressing at the local college but has decided she is ‘rubbish’ at it and not likely
to continue. She has, however, recently had a chance to do her work experience in the school
office and this change of space she occupies in the school, one where she works alongside
the school staff rather than as a student in a classroom, has given her a new perspective on
school and the relationships she has with the teachers. This excerpt from her interview gives
a glimpse into her learning narrative and the impact this new space has had on her:

Because like in Year 7 I was good and then in Year 8 and 9 I was a bit naughty, um, part
of Year 10 and like when I did work experience, [I] kinda like changed my mind about
school like [V Oh right]. Teachers aren’t just being nasty to you because they wanna be,
it’s like they’re doing it because they have to like, I can’t explain it like, they’re doing
it because they don’t want to do it but because they have to do it because it’s their job.

Scarlet also had trouble working out her course options for Year 10 but has now decided,
from her work experience, that what she wants to do is to work in a primary school, with
little children. This realisation has been a shift from her earlier thinking: ‘I’ve always thought
I’d never ever want to work in a school’. When I asked if she got along with her teachers,
she admitted, ‘Some of em yeah. Some of em I’ve had problems with in the past but we’ve
resolved that.’ Problematic relationships with teachers seem to be central to her narrative and
to changes in the way she engages with school and her school work. She says:

• S: And then, I’ve learnt to stick it along cos it’s not going to help me if I fall out with my
teachers and stuff [V Right yeah] Cos obviously I’m not going to work and do my best
because I’m saying oh I don’t like that teacher [V Yeah] But there’s odd teachers that I
still don’t like. I have to get used to it.

• V: Has it changed, at some point your, the way you approach school? Your work?

• S: Yeah, I think. Um I’ll have realised how hard it is to actually get your grades and how
hard it is in school. I feel I’ve had to get all my, I’ve actually realised I need to do my
best and try my hardest in class instead of arguing with the teachers and just think I need
to get my head down and do the work instead of [V Yeah], how you might either, where
it’s gonna all come back on me anyway if I don’t get good grades it’s all going to come
back onto me. So if I try my best and I’m not, I’ve tried, all I can do is try.

I interpret this as Scarlet having changed her perception of the space of school, which is
configured in terms of relationships and goal-oriented activities. The contradiction she expe-
rienced by finding she enjoyed working with young children in the school’s primary school,
a different space to the one she had known at the school, seemed to provide the impetus for
this new configuration of the school and her activity system.
Conclusion

The proposed framework can be useful in exploring mediation of place and the ways adjustments young people make to their identities and future plans are mediated by place and spatial discourses, thus elaborating on an aspect of the activity system which has traditionally been relegated to the context of decision-making and social practice rather than a mediating factor. The two young people interviewed for this pilot study indicate for us that some of the decision making and development of aspirations involves Thirdspaces – spaces of imagination and boundary-drawing. The insights gained from such an investigation have the potential to open up new areas for interventions and approaches which enable post-16 progression pathways that are positive and productive for young people. The aim is to expand on the metaphorical notion of ‘wiggle room’ (Erickson, 2001) and ground this expanded view in the creation of spatial configurations and conceived spaces that promote progression towards career goals. Future research will aim to explore ways spatial representations are mediating various nodes of the activity system and how these may be reconfigured to resolve contradictions and enable new ways of progressing and learning.

The narratives of this small group of young people suggest that progression pathways are changing and that experiences in new spaces can enable changes, potentially reconfiguring relationships with teachers and opening up new possibilities for the future. I would like to conclude with a few of the key questions I hope to pursue with this line of research, questions which bring in more of the activity theory perspective, and in particular the potential for further research into Thirdspaces:

- Could there be opportunities to enable new conceived spatial configurations and Thirdspaces through attending to contradictions?
- Could virtual play be used as a way to role play and experience other places and spaces, hence transgress boundaries of conceived spaces and increase familiarity with unknown spaces?
- Are there ways to allay fears and worries that come with entering into new spaces (transitions)?

References


