

# Action Research, Democracy and (Global)Citizenship

## Building bridges among traditions and practices

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

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

### **Investigación Acción, Democracia y Ciudadanía (Global):**

Construyendo puentes entre tradiciones y prácticas

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

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

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

## As introduction: Is there fire under the ashes?

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

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

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

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

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

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

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

## The democratic legacy of Action Research

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

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

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

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

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

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

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

#### *Two European voices*

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

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

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

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

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

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

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

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

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

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

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

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

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

## Two Latin American voices

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

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

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

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

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

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

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



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

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

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

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

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

## A framework for comparative studies – as conclusion

The reflection produced in this paper calls for a proposal of possible extensions and in-depth analysis. Action Research, as we know, is an umbrella concept that comprehends a vast scope of understandings and practices, as can be seen, for instance, in the *Sage Handbook of Action Research*. I agree with the editor, Hilary Bradbury, that the metaphor of the family is quite appropriate to refer to the community of Action Researchers (Bradbury, 2015, p. 4). In the family there is not always agreement among the relatives, some of them are closer and others more distance, but usually there is a true desire to meet for knowing each other as well as to tell stories about the fathers and mothers.

When Gustavsen (2017) was advocating for an Action Research social movement to make an impact on society, he brought comparative studies as a tool for connecting different schools and practices. The case, he argues, is not to bring each individual case into a general theory, but to bring to light the characteristics of each case, identifying the differences and the similarities. There could then be organised clusters, which on their turn could please exclude be compared among themselves. “The richer a specific context is in terms of different phenomena, the more likely it is that new combinations will be discovered” (p. 108). Again, the larger background should be democracy, meaning the space for dialogue.

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

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

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

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



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

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

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