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2004.06.04

## **'We learnt to swim when we were already in the water'**

A study on what- and how the team-members of Lifestyle AM  
have learnt in their work

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## Abstract

Arbetets art:	C-uppsats i Arbetslivspedagogik
Sidantal:	40 sidor
Titel:	<b>‘We learnt to swim when we were already in the water’:</b> A study on what- and how the team-members of Lifestyle AM have learnt in their work
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Datum:	2004.06.04
Sammanfattning:	The study aims to investigate learning processes that take place in the European Innovation Community. The research is based on a case-study of one of the EU projects – Lifestyle AM. The project dealt with knowledge transfer issues, providing support to the EU innovation projects. The study addresses what- and how have the team-members of Lifestyle AM learnt in their work. Interview and document qualitative studies are employed as methods of research. Based upon a contextualised model that builds on Argyris’ model of single- and double-loop learning and Ellström’s model of adaptive- and developmental learning, an analysis of the learning loops in the Lifestyle team is carried out. The results of the study showed that elements of single- and double-loop learning intertwined at different levels of work in the team.
Nyckelord:	Learning, single-loop learning, double-loop learning, task, methods, results.

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## **Acknowledgements**

Thank you to Michele, Bengt, Claes, Lars, Paolo and Rob for the valuable information they revealed to me in the interviews.

Thank you to Lars Karlsson for his helpful comments and valuable advice in the course of this study.

Thank you to my boyfriend David who has had the patience to listen to all my thoughts and for the intellectual contribution in this study.

# Introduction

## **The importance of the research topic**

We live today in a society where knowledge has increasingly become one of the pillars of development. Researchers, politicians and economists talk about knowledge economy, economic growth and innovation. The urgent need for more innovation in Europe has been addressed for a long time by many institutions and organisations both at national and European levels. In organisations the need for increased competence development has been emphasized in order to cope with competition on the national and world markets as an answer to the rapidly changing context. The need today is to accelerate the development of knowledge, skills and attitudes of individuals and organisations. This implies reconsidering learning strategies both at the individual and at the organisational levels.

## **The pedagogical relevance**

New pedagogical approaches to learning are urged by these emerging needs of accelerated development of the individual, organisation and society. How to cope with the problems of the modern society: increased flow of information, increasing demands on individuals' and organisations' performance: creativity, ability to cope with uncertainty, ability to perform under pressure, ability to set goals and carry them out independently, ability to work in team etc. The pedagogical dimension of this study is to address the essence of learning processes in the uncertain environment that characterises the reality today, where individuals, organisations and society as a whole have to work and develop. An ambition of this study is to test and maybe develop an aspect of the famous often referred to model of single- and double-loop learning of Chris Argyris.

## **What makes this case interesting?**

The idea of studying the learning processes in a complex and uncertain environment has emerged as a result of my experience of work in one of the projects dealing with innovation issues in Europe and during the discussions with the members of this project about their experiences in their work. What fascinated me about these people was their abilities to cope with changes in their directives of work, unclear objectives and all sorts of other difficulties, and still managing to collaborate and 'do their best in that situation', as one of the project members expressed. These people were engaged in intricate facilitating, coordinating and building processes aimed at improving knowledge management in a community of innovation projects. In a way they were training the trainers, dealing basically with learning issues. And I wondered what and how did these highly competent professionals themselves learn out of their experiences during the project.

## **The Research Questions**

My research interest lies in studying learning processes that happen in the European Innovation Community (EIC)<sup>1</sup>. This study aims to uncover elements of this learning processes in one of the projects that makes part of this community – Lifestyle AM. Consequently, the research is based on a case study, focusing on an European Union (EU) project – Lifestyle Accompanying Measure (AM), designed to coordinate, organise and facilitate a range of activities for and with EU Innovation Projects (IP). The study aims to investigate and analyse how learning processes develop in Lifestyle AM. In order to understand and analyse the development of the learning

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<sup>1</sup> European Innovation Community is defined here as a community of Innovation Projects, Accompany Measures, Small and Medium Sized Companies, Universities and other organisations dealing with innovations in Europe

processes in the Lifestyle team, it is important to also study what have the team-members learnt during their work. Consequently the study will focus on two questions:

1. What have the team-members learnt in the Lifestyle AM during its activity?
2. How did they learn during their work in the Lifestyle AM?

These questions will be addressed through qualitative document analysis and semi-structured interviews. The first question will be analysed empirically in order to understand the second question. The theoretical framework of the study is based on Argyris model of single- and double-loop learning and Ellström's model of adaptive- and developmental learning.

### **The Delimitations of the Study**

In studying learning processes there is always a danger of losing the focus, as learning is a process that happens in so many different subtle forms and in a strong connection with the individual's personal and professional background. Learning processes flow from one activity to another, that means elements of learning can emerge in one situation as a result of one activity and spill over in other situations or activities and so on. Thus it can be difficult to delimitate exactly where and what type of learning had occurred, whether it was at work, or in the street or in the library.

It is therefore important to define the limits of this study. First, physically its content was to be presented in 35 pages and completed in about three months time. The purpose of the study is quite ambitious and wide, but the study will particularly try to uncover some of the aspects that characterises the learning processes within the European Innovation Community, and more specifically the learning that the individuals engage into in their work in the innovation community. Further, the research questions delimit those learning processes to those that happened in a team of professionals working for the European Commission and for the innovation projects.

The theoretical questions also have the purpose to delimitate the focus of research, especially when some hypotheses are developed and where specific variables are chosen, which are the work tasks, the methods of work and the results. The environment that influences learning is very complex and a range of factors determine and influence the learning process of the individuals. These factors will be named, however they will not be addressed extensively in this study.

### **Introducing the case**

For understanding the learning processes that took place in the project an overview of the work process and the environment of work of the Lifestyle project members is necessary.

Lifestyle AM is one of the European Union Accompanying Measure projects that were funded by the European Commission/DG Enterprise as a part of the Fifth Framework Programme<sup>2</sup>, action line "Promotion of Innovation and Encouragement of SME Participation" aimed at stimulating innovation in Europe. The action line consisted altogether of 76 Innovation Projects (IPs) and 6 so called Accompany Measures (AMs) projects. The IPs were developing and materialising different innovative ideas in a range of industrial and social areas. The AMs were projects supposed to provide different types of support to the IPs. The support provided by the AMs was intended to help the IPs especially with the non-technical problems, which could be all from project management and coordination to the marketing of the innovations, knowledge

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<sup>2</sup> For more information on the Fifth Framework Programme look at the DG enterprise webpage: [http://europa.eu.int/comm/enterprise/funding/grants/themes\\_2004/](http://europa.eu.int/comm/enterprise/funding/grants/themes_2004/)

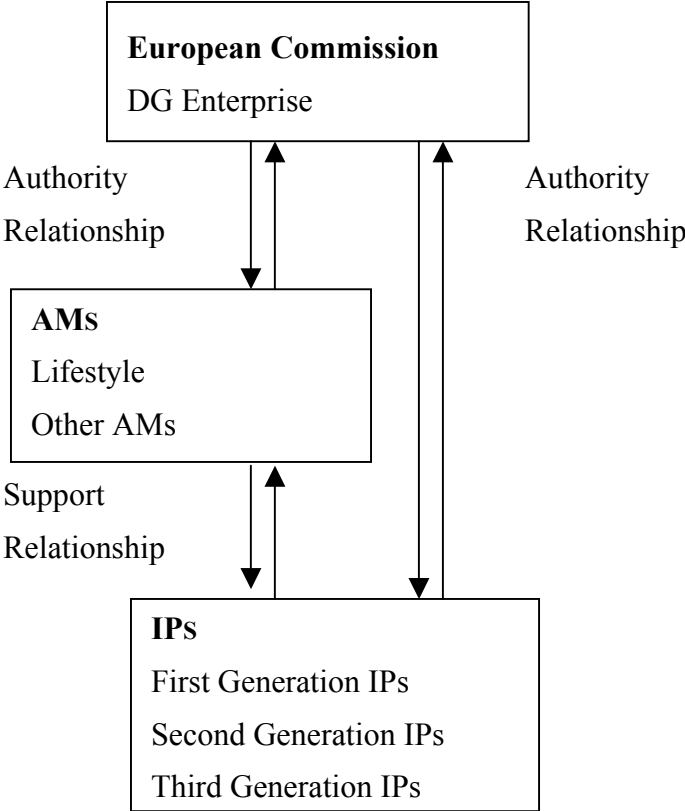
<sup>5</sup> Lifestyle AM will be also referred to in this study as Lifestyle team, Lifestyle project, Lifestyle.

management and competence development. Lifestyle particularly worked with all types of issues related to learning.

Besides Lifestyle there were 5 other AMs: Strategist, Clip, Pride, Showcase, Ecoinnovation, which were supposed to collaborate in their work with the IPs. During Lifestyle’s lifetime – about 4 years – they had to deal with an increasing number of IPs that were born as a results of three calls for proposals from the European Commission in 1999, 2000 2001. It was also common to use the denomination First, Second and Third generation projects.

So in the start up period the AMs had to work with 15 IPs and at the end this number had grown to be more than 70. At the same time the AMs were implicitly forced to play an intermediary, role between the European Commission and the IPs. The European Commission was the authority that was setting the framework of activity of AMs, giving them general directives of action and evaluating the results of their work. Both AMs and IPs were accountable to the European Commission. The relationship between the European Commission, the AMs and the IPs can be summarised as in the figure 1 below.

**Figure 1**  
**Relationship between the AMs, the IPs and the Commission**





# Description of the Lifestyle AM

The Lifestyle AM<sup>5</sup> was composed of a multi-national team of practitioners and experts from Sweden, Holland, Italy, Austria and Spain. The project's essence was to provide the IPs with support regarding the non-technological issues of their activity. The support was based on validated and established methodologies<sup>6</sup> and tools in order to facilitate, help and improve the IPs' performance in their work. The Lifestyle team included specialists in management, business innovation, enterprise and enterprise creation issues as well as specialists in social and organisational aspects of innovation and especially in innovation related learning. During its activities the project core team consisted of 7 to 8 people. The team was quite flat in its organisation, meaning that decisions about the work were taken more or less collectively, through discussions and mutual feedback. However, two of the members, the project manager and the administrative coordinator, were often engaged in direct talks with the Commission<sup>7</sup> and had to make sure that the project followed the Commissions directives.

The general objectives of the Lifestyle project were (as stipulated in the Contract of Work, Project Description, p.2):

- To offer the IPs a comprehensive support in non-technological issues, with a main focus on the transfer and management of knowledge.
- To act as a facilitator in the process of knowledge sharing, improvement and management between the IPs.

Among the non-technological issues that the AMs and the IPs had to address were (as stipulated in the Contract of Work, Project Description, p.9):

- Knowledge transfer, knowledge management within and among the IPs.
- Consensus and mutual trust building among the IPs
- Business and market focalisation for the exploitation of the innovation results.
- Financing issues
- Dissemination of the innovation results

These non-technological issues were to be addressed by Lifestyle on the basis of established and validated methodologies and tools (as stipulated in the Contract of Work, Project Description, p.9)<sup>8</sup>. The main methodological tools were:

- **Improvement Circle (IC)**, which in essence was training the IPs to maximize their management of knowledge through forming cross-organisational groups meeting on a regular basis.
- **Business Idea (BI)**, was referring to training the IPs in commercialising their innovation products through developing business ideas, marketing activities etc
- A **Web based platform**, which was envisaged to play an important role as a means of cooperation, communication and knowledge transfer among the IPs.
- **Change and Improvement Workshop (CIW)** addressed a cluster of IPs that shared one or more interest issues.

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<sup>6</sup> These methodologies and tools have been developed and validated in another EU project called EASW. A detailed information about the methodologies and tools can be found on [www.cordis.lu/easw](http://www.cordis.lu/easw)

<sup>7</sup> Under Commission it is meant here project officers and other functionaries of the European Commission

<sup>8</sup> For a detailed description of the these methods check [www.cordis.lu/easw](http://www.cordis.lu/easw)

## The Development of the Work Process: An overview

Most of the work of the Lifestyle project evolved around the big events of change and improvement workshops (CIW), most of them organised in the context of the successive European Innovation weeks that took place in Gothenburg (06.2001), Pamplona (06.2002), Brussels (10.2002), Potsdam (12.2002), Luxembourg (10.2003) and Florence (12.2003)

The Lifestyle AM project started with an exploratory activity, where the Lifestyle project members, together with the other AMs, were investigating and mapping the then existing 15 IPs in order to get acquainted with their (IPs') project activities, problems and needs.<sup>9</sup> This was the so-called "one to one" period, where the typical relations were between one AM giving support to one IP.

Most of these initial individual Lifestyle supports were based upon the BI and the IC tools. Lifestyle team was also from the start engaged in creating a web platform for storing the information about the IPs and at the same time for creating a common space of communication between the AMs and the IPs This Internet space was called: [www.innovation-matters.net](http://www.innovation-matters.net).

The Gothenburg European Innovation week (06.2001) was the first big common event organised by Lifestyle, gathering all the 6 AMs, 11 IPs and project officers (from the Commission) in place. The central support activity during the Gothenburg week was a CIW organised by Lifestyle. The central objective of the CIW was to together with the IPs make an analysis of their activities and learn about their needs for support. A list of 'burning issues' for the IPs was created<sup>10</sup>. In Gothenburg CIW a number of public parallel workshops were organised, with active participation of different IPs around the themes "Turning obstacles into opportunities", "The integrated virtual company", "Innovation trends and systems", "Mobilisation and empowerment in the development of innovative systems".

In the meantime the project officers took the initiative in organising a clustering exercise without consulting the AMs and took the decisions about which IP that should belong to which theme and subsequent thematic cluster.<sup>11</sup>

The next big support event was the CIW in Pamplona during the Spanish Innovation week (06.2002), where the AMs continued their efforts to appear as AM cluster creating a 'crew' with people from all AMs, would provide integrated support to the IPs. Here the Lifestyle team organised training sessions in collaboration with the other AMs where the BI, IC, as well as new methods, for innovation management and creativity, exploitation of innovation and business ideas by the IPs, were introduced. The Pamplona event resulted in a restructuring of the clusters. The new clusters<sup>12</sup> were now to a higher degree defined by the IPs themselves with the assistance of AM representatives.<sup>13</sup> In the cluster work that followed after Pamplona the different AMs came to be closer related to different clusters. Lifestyle was mostly concentrating its efforts

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<sup>9</sup> The IPs, as well as the AMs, were selected through so called Calls for Proposals in 1999 (15 IPs+6 AM), 2000 (30 IPs) and 2001 (31 IPs).

<sup>10</sup> The 'burning issues' were presented and analysed in the Report N. 10, Downloadable prognostic analytic report summarizing the findings and lessons learnt from the active supply and assimilation of all methods and supports provided by Lifestyle

<sup>11</sup> From the Luxembourg meeting three clusters resulted, but none of these clusters did achieve any substantial independent activities in spite of the support from the AMs.

<sup>12</sup> The SMEs Involvement Cluster, The Project Management Cluster, The GO-Cluster and The Knowledge and Competence Cluster

<sup>13</sup> With 'cluster' here it is meant a group of IPs, which was based on common interests, problems and needs.

to the "Knowledge and Competence Cluster". From now on the CIWs were focus on facilitating and promoting the clustering efforts. The support was also meant to be provided from the AM cluster to different clusters of IPs.

The next cluster support CIW took place in Brussels (10.2002). This time it was mainly an AM cluster reunion, but also with the participation of the more active IPs (cluster leaders). During this CIW, Lifestyle presented to the other AMs what would later be called the 'Eucluster concept'. The idea was to design and build a competence based clustering tool for the IPs, to be provided over Lifestyles site [www.innovation-matters.net](http://www.innovation-matters.net).

The next Clustering CIW took place in Potsdam (12.2002). The Potsdam CIW gathered the 6 AMs and 30 IPs. The fact that only 4 of the new IPs<sup>14</sup> had got their contracts signed was a great source of frustration, as the Potsdam event was planned to be a meeting place for all IPs of the action line during the Fifth Framework Programme. The activities at Potsdam CIW focused upon the strengthening and build-up of the existing IP clusters and laying the basis for effective corporate support, in lines with the Commission directives. The discussions and concept development from the Brussels CIW about the creating of a 'competence-clustering database', which would map the non-technical competence supply and demand in the IPs, continued and deepened in Potsdam.

With the end of the year 2002 the AMs, including Lifestyle were supposed to wind up their activities as their contracts were running out. However, Lifestyle asked for a contract prolongation till the end of 2003 in order to be able to continue to facilitate the clustering process among those IPs and also continue provide the needed support to the established clusters. Lifestyle team could start the re-definition of their strategies and tactics of activity again; being now the only AM providing support to the IPs. The clustering process, which previously had been started didn't show visible results, thus they had to reconsider the essence of the clustering process.

The team could finally come to the next clustering CIW in Luxembourg (10.2003) with some new ideas about the clustering process. They had been working on improving the communication platform between the IPs and building a database on detailed information about the IPs, which also included their competence profiles. The platform has materialised on [www.eucluster.net](http://www.eucluster.net), with the ambition of becoming a focal centre for an emerging European Innovation Community

Soon after the Luxembourg CIW followed the Florence CIW (12.2003). Here the team had worked out a more defined framework, having more clear objectives and being the only leader of the clustering process. A crucial part of the strategy was to allow more interaction between the IPs and let them synergise towards collaboration in clusters. Based upon the results produced at the Gothenburg CIW (!), the subsequent CIWs and on a recent survey (including projects from all generations) on competence development needs in the IPs and their expectations from the clustering process, new, better defined clusters were created, involving more actively the IPs in the leadership of the clustering activities. Thus four IP clusters have developed from the previous attempts of clustering: cluster on Competence Development, cluster on Dissemination and Marketing of Innovation, a cluster on SME growth and Knowledge Management and a cluster on Sustainable Development.

This was a short overview of the biggest events in the Lifestyle work in order to understand the kind work the Lifestyle team members were doing and the learning that could happen in their work. The environment in which the team had to work was very special. The team members were living and working in different countries – Sweden, Italy, Netherlands Austria and Spain. In their work they had to deal with IPs which were representing all the countries of the European Union. The communication between the team members mainly had to take place through internet

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<sup>14</sup> from the 31 of the 3rd generation

and telephone. The only occasions when the whole team met were at some few project meetings and the CIWs.

## Theoretical Framework

### Definitions of Learning

'Learning' is commonly defined in very diverse ways, reflecting a widespread recognition of many different types of learning. A standard definition of learning sounds like this: 'learning is the acquisition of a form of knowledge or ability through the use of expertise' (Hamlyn 1998). Jarvis, for example, argues that 'learning is intimately bound up with action, it (learning) is a process of thinking and acting and drawing a conclusion' (Jarvis 1992, p. 85). The literature abounds in studies with new, interesting definitions on learning, depending on the theoretical perspectives adopted by the researchers.

However, as Ellström notes, there is a consensus regarding the fundamental meaning of the concept, for ex. Estes 1970, Gagne 1965, Langley and Simon 1981, Marton, Hounsell and Entwistle 1984 (Ellström 1992, p. 67). In his study on learning and competence development Ellström gives a definition that tries to embrace the common elements upon learning from different theoretical perspectives: '*Learning is the relative, enduring changes which occur as a result of the interaction of the individual with his environment*' (Ellström 1992, p. 67. My translation)<sup>15</sup> This is a general, comprehensive definition which attempts to seek common grounds in the discussion on learning.

Two fundamental questions arise from this overarching definition and they refer to: a) the kinds of changes that learning implies and b) the character of the individual's interaction with the environment. Regarding the first question different theoretical perspectives answer differently. For example the behaviouristic theorists explain learning as a result of changes happening in the individual's behaviour or dispositions (Gagne 1965, Estes 1970). In more recent theoretical developments, in cognitive psychology for ex, learning is explained as change of the individual's perceptions of phenomena (Marton, Hounsell and Entwistle 1984, 1986), as change in cognitive structures, knowledge and intellectual skills (Andersson 1981, Gagne 1984) or understanding the meanings that people create when they interact with each other, explained thoroughly by sociologists, ethno-methodologists, existentialists, social constructivists (Argyris 1980, Argyris and Schön 1974, 1978, ) and postmodernists (Beckett 2002).

On the other side, other researchers have found that the vagueness and the ambiguity of the concept of 'learning' is increased by the fact that it is commonly employed in both a *task* sense and an *achievement* sense (Winch 1998). Learning in the task sense refers to trying or attempting to learn, putting the focus on the *process* of learning, while learning in an achievement sense refers to successful learning, focusing on the *product* or *outcome* of learning (Winch 1998).

### The definition of learning in this study

On the basis of the consulted literature in the field and under the influence (impressions) of the postmodernist discourse on learning I have constructed a definition of learning that will be the basis and continuous reference for the research in this study. Thus learning in this study is defined as *acquiring and applying knowledge, skills and attitudes as a result of individual's interplay with his/her environment, which leads to changes in the individual's competences (i.e.*

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<sup>15</sup> 'Med lärande avses här relativ varaktiga förändringar hos en individ som ett resultat av individens samspel med sin omgivning.' (Ellström 1992, p. 67)

*knowledge, skills, attitudes and personal traits*). Based on this definition I will construct the interview questions and the code-themes for the qualitative content analysis of the documents.

Next, in order to get a more specific (theoretical) explanation of the sought learning processes in this case study, I need to operationalise and contextualise this definition. Based on the definition I will be looking at processes where knowledge, skills and attitudes have been acquired and applied in the work process in Lifestyle. Also, according to the definition of learning in this study, I will be seeking for some kind of changes that occurred in the individual (or collective) competences of the Lifestyle members. Thus, any kind of changes in competences that will be found (document analysis, interview data analysis) will be regarded as learning and presented and analysed in accordance with the research questions of this study. Also, an important aspect regarding the definition of learning refers to the interview data and the interpretation of the definition of learning of the interview-respondents. Normally, I expect every respondent to have his own definition of learning, which I intent to clarify and correlate with the definition of learning in this study, in order to increase the quality of interpretation.

In order to identify what have the team-members learnt and especially how did they learn during their work in the Lifestyle AM, I chose to use Argyris model of single- and double loop-learning and Ellström's model of adaptive and developmental learning. These two researchers are well known in the field of competence development and learning theory, being constantly referred to in most of the recent research in education, human resource development and sociology. I chose these two models as they, complementing each other trying to explain learning processes, and namely choices that individuals make in their learning. These two theoretical models approach learning from a problem-solving/problem-setting perspective, that is, they try to explain learning resulting from individual's choices in solving problems.

## Argyris model of single- and double-loop learning

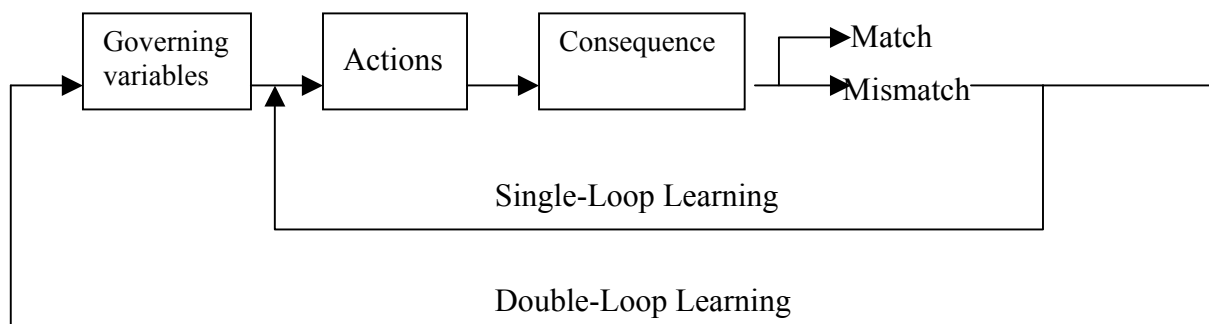
Argyris defines learning as the detection and correction of error. Error is defined as any feature of knowledge or of knowing that makes action ineffective. He defines error as a mismatch: a condition of learning. Consequently, *the detection and correction of error produces learning and the lack of either or both inhibits learning* (Argyris 1976, p. 365).

He identifies two conditions under which learning happens. First, learning occurs when an organisation achieves what it intended, that is there is a match between its design for action and the actuality or outcome. Second, learning occurs when a mismatch between intentions and outcomes is identified and corrected (Argyris 1999, p.67).

In Argyris model, the single-loop learning occurs when errors are corrected without altering the underlying governing values. The double-loop learning occurs when errors are corrected by changing the governing values and then the action (Argyris 2002, p. 206).

Single-loop learning occurs when matches are created, or when mismatches are corrected by changing the action (Figure 2). Double-loop learning occurs when mismatches are corrected by first examining and altering the governing variables and then the actions. Governing variables are preferred states that individuals strive to follow when they are acting. These governing variables are not the underlying beliefs or values people espouse. They are the variables that can be inferred, by observing the actions of individuals acting as agents for the organisation, to drive and guide their actions (Argyris 1999, p.68).

**Figure 2. Single-loop and double-loop learning**



Source: Argyris, C., 1999. On Organisational Learning. P. 68.

Argyris finds that most people define learning too narrowly, as mere ‘problem-solving’, so they focus on identifying and correcting errors in the external environment. ‘Solving problems is important’, he says, ‘but if learning is to persist, managers and employees must also look inward. They need to reflect critically on their own behaviour’ (Argyris 1999, p.127). Single-loop learning is appropriate for the routine, repetitive issues – it helps get the everyday job done. Double-loop learning is more relevant for the complex, non-programmable issues.

He concludes that learning that challenges the status quo is double-loop learning and learning that is routine is single-loop learning (Abernathy 1999).

### **Critics to the single- and double loop models of learning**

Argyris’ model of single and double-loop learning have been successfully taken over by other education- and organisation theorists and developed in some way or another, applied in different contexts and analysed its implications for further research. For example Probst and Büchel (1997) have built their model of ‘adaptive-’ and ‘reconstructive learning’ on Argyris model of single- and double-loop learning. Thus, in Probst and Büchel’s model of adaptive learning, defined as a process of adjusting effectively to given goals and norms by mastering the environment (Probst and Büchel 1997, p. 33), builds heavily on Argyris single-loop learning. Reconstructive learning, defined as a process of questioning organizational norms and values, and building a new frame of reference, resembles basically Argyris double-loop learning (Probst and Büchel 1997, pp.34-35).

On the other side the model has encountered criticisms for its conceptual limitations and its questionable application in reality (Golembiewski 2000). The postmodernist theorist Beckett referred to Argyris model in his work and has praised the model for its conceptual innovation in the field of organisation development. On the other side he argued that rule-based approaches, such as Argyris’, are orientated towards problem solving, which is of course what marks out a lot of the manager’s daily life. But rule-following amidst ‘hot action’ is too much like system thinking – it does not reflect what daily life for managers is like. Therefore it is not likely to be of much help in advancing manager’s learning in the working place (Beckett 1999, p.85).

Argyris model of single- and double loop-loop learning, like most of the theoretical models has its own limitations, like for example building on the assumption (on which most of the rational choice theories are based) that human individuals are rational beings and capable of rationalising in every situation, under any circumstances (conditions). However, practice has shown that most of the individuals do not act rationally all the time and that the individual’s thinking and consequently decision-making, is not dominated just by rationality. There are a range of factors that influence the individuals thinking and learning like emotions, feelings, culture, dispositions, background, other people etc. In the application of this model I am aware of this limitation and

that is the reason I appeal to the postmodernist argument regarding the complexity of factors which influence individual's thinking, and learning, be it single or double-looped.

Now, for the sake of simplicity and elegance of the study I should limit the theoretical framework to Argyris model of single- and double-loop learning. However, the aims of this study of finding out what have the team-members learnt and how did they learn during their work in the Lifestyle AM determined me to look for something more, for some type of contextualisation of the model – a theoretical contextualisation. So, I needed a model, which would help me to apply and analyse Argyris model. That was the reason I appealed to Ellström's model of adaptive- and developmental learning.

## Ellström's model of adaptive and developmental learning

Ellström defines learning as changes in individual's competences, i.e. changes regarding knowledge, intellectual and manual skills as well as social skills and personality-related traits (Ellström 1992, p. 68).<sup>16</sup> He makes a distinction between two major modes of learning: adaptive and developmental.

The point of departure for making this distinction is the character of the work-learning situation, specifically, the tasks to be performed, the methods and procedures to be used, and the results to be achieved. More specifically, the two modes of learning are defined in terms of the discretion (scope of action) of the learning subject with respect to the interpretation and definition of these three aspects of the work-learning situation. The taxonomy presented in Table 1 shows that the subject's scope of action with respect to the work-learning situation may be used to define different levels of learning (Ellström 2001, p. 424).

**Table 1. Levels of Learning as a Function of the Scope of Action That Exists with Respect to Different Aspects of the Work-Learning Environment**

	Levels of Learning			
	Adaptive Learning		Developmental Learning	
Aspects of Work-Learning Situation	Reproductive	Productive Type 1	Productive Type 2	Creative
Tasks	Given	Given	Given	Not given
Methods	Given	Given	Not given	Not given
Results	Given	Not given	Not given	Not given

Source: Ellström, P.-E. (2001). "Integrating Learning and Work: Problems and Prospects." Human Resource Development Quarterly 12(4): 421-435

Table 1, distinguishes two cases. Thus, according to the model, adaptive learning occurs when more than one of the three aspects of the work-learning situation are given in the sense of being prescribed in detail and not officially open to definition (or redefinition) by those involved in the

<sup>16</sup> 'När vi ...talar om lärande och dess innehåll avses...förändringar av individens kompetens. Med andra ord, förändringar som kan avse såväl kunskaper, intellektuella och manuella färdigheter som attityder, sociala färdigheter och personlighetsrelaterade egenskaper' (Ellström 1992, p. 68)

performance of the tasks (or taken for granted). Developmental learning occurs in the case in which more than one of the three aspects are not given, meaning not prescribed in detail, and when the actors, on the contrary, have to use their own competence and authority to define and evaluate the task, methods, and results.

Reproductive learning, considered as the lowest level of learning, corresponds to conditioning models of learning, resulting in routinised (automated) actions performed without much conscious attention and control. Consequently, tasks and methods are connected on the basis of routine connections rather than on the basis of analysis and inference. Productive learning is characterized by a higher degree of discretion with respect to the evaluation of results (Type I) or with respect also to the choice and use of methods (Type II) (Ellström 2001, p. 423).

In the productive learning - type I, the learner has to evaluate the outcomes and make minor corrections in the way the methods were used to solve the problem at hand. This type of learning would apply to a work situation where the workers aim is to continuously improve the work procedure. By contrast, in productive learning - type II, the learner has to engage in a more active process of knowledge-based problem solving through experimentation, that is, the learner has to invent and test a solution to the given problem based on knowledge about the task and about possible alternative solutions. This mode of learning becomes necessary when the worker encounters new or unfamiliar situations for which no rules or procedural knowledge (know-how) are available from previous experience. At this level of learning, performance is assumed to be controlled by goals and based on explicit knowledge; that is, knowledge that can be reported verbally (Ellström 2001, p. 424).

Creative learning is the highest level of learning in Ellström's model (Table I). In this stage the learner has to use his or her own authority not only to evaluate outcomes or choose methods but also to define the task and the conditions at hand; the learner must diagnose a perhaps new, unclear or puzzling situation. One of the crucial elements in this process is to make explicit (and thereby testable) the often implicit and taken-for-granted premises of our actions (Dewey, 1933). This requires the actor to see the action and its consequences in perspective. It also requires an ability to consider alternatives and to critically analyse underlying assumptions and other conditions of action. Thus creative learning occurs when individuals or groups of individuals within an organization begin to question established definitions of problems or objectives and to act to transform institutionalised ideologies, routines, structures, or practices (Ellström 2001, p. 424). This type of learning we can compare with Argyris' double loop learning, which will be discussed later in this chapter.

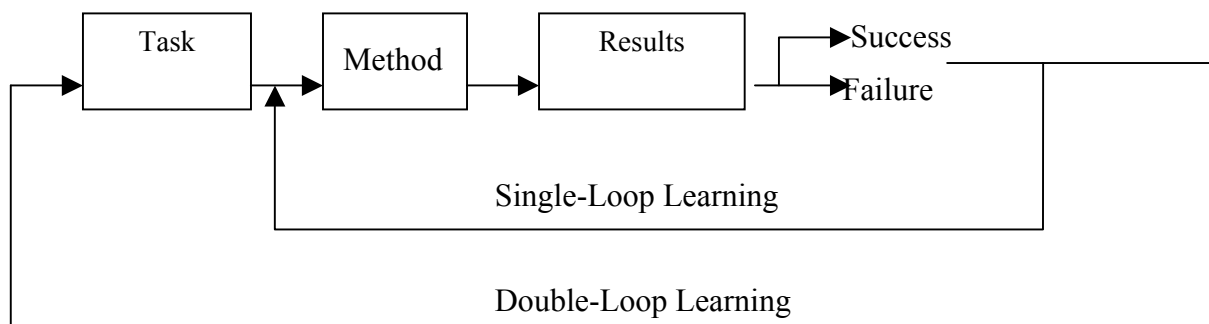
It is important to underline that Ellström's two main modes of learning - adaptive and developmental - should not be perceived as mutually exclusive. On the contrary, they are assumed to be complementary. In fact, the complex character of much professional and skilled work and the need to move between routine and non-routine work indicate that organisational learning cannot be equated with either a reproductive, productive, or creative mode of learning. (Ellström 2001, p. 424).

## A Contextualised Model: combining Argyris' and Ellström's models

Contextualising Argyris model, i.e. delimiting specific variables of interest, with the help of Ellström's model, have thus allowed building some hypotheses regarding how learning can develop in problem-solving situations. The contextualised model is presented in Figure 3 and the delimitations of variables is described subsequently.



**Figure 3. Single-loop and double-loop learning – contextualised**



Source: Argyris, C., 1999. On Organisational Learning. P. 68.

As we can see from the model in Figure 3, Argyris' single- and double-loop model looks a little bit different now. What we have done here, was to choose and focus on just one variable from each group of variables that Argyris' model comprises. And Ellström's model was applied here. Thus, from the Governing Values, we have chosen the Task as the focus variable, from the Actions we have chosen the Method as the focus variable and from the Consequences we have chosen the Results as a focus variable. Next, we have interpreted match and mismatch alternatives as success and failure alternatives.

These focus variables will also be the focus and of this study when examining how the team members thought and behaved in their work. This delimitation of variables is done for the sake of possible hypotheses that can be developed focusing on a limited number of variables. Also, the rationalisation of the model is limited to specific variables, but in the study there will be some attention paid to other variables that will come out, however their interplay will not be discussed extensively.

A delimitation of variables and some attempts to hypothesis building are made below:

- Governing values = tasks ( the other governing variables are organisational culture, norms, rules, interests etc, but are not considered in this study)
- Actions = methods to achieve the tasks (the other elements are resources, tools, but will not be considered in this study etc)
- Consequences = results (the other variables are products, effects, resources, states, but will not be considered in this study)
- Match/mismatch = the value of the results for the achievement of the objective(s), which can vary from 'failure' to 'success'
- Condition: scope of action = the individual has the authority to reconsider and change the methods)

Thus single-loops have occurred in the work-process as a result of detecting and correcting a mismatch or an error. When there is mismatch, the results either have failed (Results = failure) or are partially good for the task (Failure < Results < Success). Further, when the results of the carried out task are somewhere in-between total success and total failure, the individual can choose either to go back and change the methods in order to eliminate the mismatch and thus, to produce (more) successful results. Or the individual may choose to go back and change the task (or elements in the task) and then change the methods. But it is also possible that the individual may choose several times to consider the methods of a failed task, and after repeated mismatch can choose to consider the task itself (i.e. its relevance, its aims/objectives, direction etc).

When does double-loop occur? What makes the individual to choose double-looping? A hypothesis is that double-loop learning can occur depending on the value of the single-loop

learning. If the value of the single-loop proves to be not very high, that is producing unsatisfactory results (Failure<Results<Success), then the probability of choosing double-loop increases.

Another hypothesis is that the probability of choosing double-loop learning increases after several single-loops learning and producing repeatedly unsatisfactory results (Failure<Results<Success). Consequently, it can be proved that the probability of double-loop learning depends on the expected value of the single-loop learning and the number of the single-loops.

These hypotheses can reveal interesting findings about the process of learning in the project depending also on the method of research. In order to be able to find the relevant information for testing these hypotheses a documents study and interviews will be carried out.

## The Method of Research

The research questions of this study are a) what have the team-members learnt in their work in the Lifestyle AM and b) how did they learn during their work in the Lifestyle AM? These questions were methodologically handled using a qualitative approach. Semi-structured interviews were carried out and a qualitative content-analysis of the documents was produced as a complementary and support material for the interview data interpretation and analysis.

## A Case Study

Studying learning processes implies studying a complex process characterised by intricate structures of actors and factors that interact and influence each other. Although these learning processes are limited to the EIC and to the forms of learning that happen at work, the degree of complexity is still very high. In order to deal with this complexity of the learning process it is important to consider how can aspects of the learning process be investigated. Appropriate methods and tools are necessary in order to generate discussions which would provide explanations or raise relevant questions that address the learning process. The (scientific) approach and the theoretical framework is also of pivotal importance in this sense.

One way to deal with complexity of the learning processes is focusing on specific parts, dimensions or levels of the EIC, i.e. the space where these learning processes happen. Lifestyle AM is a part of EIC in this sense. This study is a case-study of the learning process that happened in the Lifestyle AM during its activity in the context of EIC. The aim of the research in this case-study was to investigate what have the project-members learnt and then, with the help of the empirical findings and Argyris- and Ellström's theoretical models of learning, explain how the process of learning happened in the project. Consequently, this case-study aims at investigating elements of the learning process and contribute to the discussion on learning processes in the EIC. In methodological terms this study can be approached as an instrumental case-study (Stake R., 1994, p. 237), which aims to examine a particular case, in order to provide insight into an issue, which is the learning processes that happen in the EIC.

## The Document Study

In this study I have had full access to a range of documents produced in the Lifestyle project during its activity: correspondence messages (e-mails), internal reports, technical management reports and memos. Thus, I have to deal with documents that had not been produced specifically for the purpose of social research. They had a reporting type of content, thus making it necessary to identify and interpret the moments implying elements of specific learning profiles or learning

processes. Thus, considerable interpretative analysis was employed to ascertain the meaning of the materials uncovered. On the other side, as Bryman wrote (Bryman 2001, p. 370), ‘this characteristic – (of the documents that have not been produced for social research, my note) - means that their content is non-reactive’, which increased the validity of the data.

### Assessing the quality of the documents

An important moment in the choice of documents is the evaluation of their quality. Are they worth analysing? What ensures their quality? Do they present a good/strong support for the argumentation? Bryman introduces and presents four important criteria for assessing the quality of the documents (Bryman 2001, p. 370). Those are:

- Authenticity – if the origin of the data is genuine, unquestionable
- Credibility – if the evidence from data is free from error and distortion
- Representativeness – if the evidence is typical to its kind
- Meaning – if the evidence is clear and comprehensible

According to Bryman, as the documents deriving from organisations are likely to be authentic and meaningful, the researcher should focus especially on the issues of credibility and representativeness of the documents (Bryman 2001, p. 376). The authenticity of the documents in my study was ensured by the fact that I received the copies of the original official and unofficial documentation from the project’s archives. These were official reports of different types that have been presented to the Commission, as well as internal reports and memos. Also, I have had access to some e-mail correspondence of the project, which ensured the authenticity of the material.

The credibility of these documents was expected to be high at least when considering regular correspondence letters where the partners expressed their thoughts and reflections over the work process to each other. Regarding the credibility assessment of the process evaluation parts of the documents (in which I am most interested), I had to apply my interpretation skills in order to decipher the subjective evaluations of the activities, which I expected were influenced by the purpose of reporting to the Commission, i.e. reporting to an authority (thus involving a power relationship between the project and the Commission, who was paying the project). On the other hand, I did not look for objective accounts of the process. These documents have been written by people for people and they express in some way or another a particular point of view. Thus, as Bryman recommends it, they have to be interrogated and examined in the context of other sources of data (Bryman 2001, p.376).

The fact of choosing both basic (management reports) and specific (correspondence, internal reports, memos) documents, which have been produced under a wide time-span of the project’s activity, ensured the representativeness criterion of the document choice. Finally, an aim in itself of the document study was to seek *meaning* relevant to the research purpose, i.e. try to uncover those moments that describe learning profiles (elements of adaptive/developmental learning; single-/double-loop learning) and learning processes (integration of learning and work). Thus the *meaning criterion* was an aim and a fundamental criterion of the document study.

Before engaging in a deep qualitative content analysis of the documents, I had pursued a preliminary evaluation with regards to their relevance to the purpose of my study. This implies a detailed and clear operationalisation of the concepts of ‘learning process’, ‘learning profiles’ ‘adaptive learning’, ‘developmental learning’ ‘single-loop learning’ ‘double-loop learning’. In the operationalisation, on which subsequently I have based the coding procedure of the documents’ content and the interview guide, I made use of the theoretical models and concepts, which I chose as the theoretical framework for the study, namely Ellström’s and Argyris’ models of learning.

## Interpreting the documents

In the document study I engaged in a qualitative content analysis, which comprised searching out, interpreting and analysing of underlying themes in the materials being analysed (Bryman 2001, p. 381). Themes were coded, on the basis of operationalised concepts of 'learning process', 'results', 'task, 'method' 'single-loop learning' 'double-loop learning'. Then the material was surveyed for these themes and finally the codified themes were extracted and illustrated with brief quotations for the interpretation and analysis. In Bryman it is suggested an ethnographic content analysis (ECA), developed originally by Altheide, which represents a codification of certain procedures that might be viewed as typical of the kind of qualitative content analysis in that the researcher is constantly revising the themes or categories that are distilled from the examination of documents (Bryman 2001, p. 381).

According to Bryman the advantage of using ECA is a continuous back and forth movement between conceptualisation, data collection, analysis and interpretation. ECA employs some initial categorisation, but there is greater potential for refinement of those categories and the generation of new ones (Bryman 2001, p. 381). My choice of the qualitative content analysis of the documents was determined by the purpose of this study, which was to go into the depth of the projects activity and identify learning profiles and processes. The nature of the documents (reporting and evaluative type), which implies that themes were 'hiding' behind one or several paragraphs or in connections (cause-effect, action-reaction) between different actions, activities etc, demanded an in-depth interpretation of the material and a holistic approach to the material. Also, the limited number of the documents allowed me to some extent to engage in a (relatively) detailed study of the material.

Finally the advantage provided by the qualitative content analysis, namely a large discretion and flexibility to operate with the categories (codes, themes), determined my choice of this technique.

## Interview Methodology

Interviewing is probably the most widely used technique in qualitative social research. However this qualitative technique is not at all unproblematic. Belson, which has been investigating survey and interview techniques in social research, has found some principal causes of error in gathering of data through different survey procedures, including interviews (Foddy 1995, p. 2). Some of the problems that came out of his investigation were:

- a. respondents failure to understand questions as intended
- b. a lack of effort or interest on the part of the respondents
- c. respondents unwillingness to admit certain attitudes and behaviours
- d. interview as a stress factor that can influence respondent's memory, comprehension
- e. interviewer's failures of different kinds (change wording, technical problems etc)

In this study I took into account these problems and tried to avoid the traps of misunderstanding, indifference and stress etc. I worked on a clear and explicit question formulation in order to communicate effectively during the interviews and ensure an effective data collection. Foddy emphasises in this respect that 'a question must be understood by the respondent in the way the researcher intended, and the answer must be understood by the researcher in the way the respondent intended' (Foddy 1995, p. 23).

The interviews were carried out in a semi-structured form. That implies that an interview guide

was constructed which covered learning issues in the work process and which allowed the interviewees to answer the questions in a flexible way. During the interviews the questions did not follow a determined order, moreover new, supportive questions were asked resulting from the discussions during the interviews. However, all the questions were asked in all the interviews in a similar wording.

## The Interview Guide

In constructing the interview guide the methodologists stress the importance of defining the topic of research properly. It implies that the researcher has a clear understanding of the kind of information about the topic that will satisfy the theoretical or practical reasons for carrying out the research (Foddy 1995). In this respect the central moments are the questions of research and the operationalisation of the concept of learning based on the adopted theoretical frameworks in this study (Ellström and Argyris models).

Furthermore a range of other elements were taken into account when constructing the interview guide. Bryman suggestions were followed in principle (Bryman 2001, p. 317). A certain amount of order on the topic areas was followed in order to ensure the reasonable flow of the questions. Each question was measured with regards to its relevance to the research questions of the study. The questions were not very specific and formulated in comprehensible language.

The authors warn against using hypothetical questions in an interview (Foddy 1993, p. 33). As Converse and Presser (cited Foddy 1993, p. 33) argue that difficulties might arise from interpreting this kind of questions, as 'the respondents (in their answers) will not feel the full force of political and economic realities'. However they suggest that if hypothetical questions are asked, then at least one question pertaining to the respondents' actual experience should be included.

As some of the questions in the interview required remembering specific experiences, attention was paid to the techniques that Foddy (1993, p. 36) advises regarding the formulation of the questions. Namely, that this type of questions shall be worded in a way that helps respondents accurately retrieve the information from their memories. They shall be short enough to fit within each respondent's attention span and simple enough to be fully comprehended. Also, effort was made to avoid leading questions.

## Interpretation and analysis of the interview data

Traps and risks can emerge in the analysis of the interview data when a diversity of answers from the interviews will be presented. One approach, suggested by Foddy (1993, p. 89) is to try to classify respondents to the kinds of responses that they have given and then to analyse separately the answers for the respondents who fall into each category. In the analysis of the interview data a categorisation of the answers techniques will be used. As the advocates of open questions hold, a satisfactory coding schemata can be formulated by going through a sample of responses several times to get a sense of sort of categories into which the responses naturally fall (Foddy 1993, p. 138).

It is important to address here the position of the researcher while handling the interview data. An important factor that may influence my interpretation of the data is that I have worked in this team for three months. I have been talking, observing and working with the team members previously, which has naturally formed an image about them already before this study has started. This factor may have a positive influence on the quality of the data interpretation and analysis as I already have some knowledge and experience of their work context, which helped me to understand better what they were talking about.

## Assessing the quality of the interview data

An important methodological question is how to ensure the quality of interview data. I have already addressed quality criteria above, with regards to the document analysis technique (See p. 16). The literature on research methods used in social sciences discusses a range of criteria for measuring the quality of the research. There are discussions whether the criteria which are used in quantitative research (reliability, replicability, validity etc) are applicable in qualitative research (Bryman 2001, p.29). Some choose to apply the concepts of validity and reliability in qualitative research (e.g. LeCompte & Goetz 1982; Kirk & Miller 1986; Peräkylä 1997), while others argue that employing these criteria will render faulty and invalid measurements and data. Other authors propose alternative criteria of assessing qualitative research, like credibility, transferability (i.e. application to other contexts), confirmability (i.e. objectivity) etc (Bryman 2001, p.32).

In this study the question is whether the interview technique, i.e. semi-structured interview is relevant to the research question, whether the interview data will provide relevant information to answer the research questions. The research questions of the study are to find out what have the team-members learnt and how did they learn during their work in the Lifestyle AM. The nature of the questions implies that I need to investigate the work process and the actors involved in it. Thus, on the one hand it is necessary to look at the outcomes of the work process, i.e. reports and documents (assessment of the work process), with regards to learning.

On the other hand, interviews with the members of the project are necessary in order to get a picture on their professional experiences with regards to learning during their work in the project. Moreover, semi-structured interviews (compared with structured and unstructured interviews) will allow a degree of flexibility in answers, thus giving the interviewees the possibility to describe their learning experiences 'in their own way'. Thus, the semi-structured interviews will produce more revealing and deeper information regarding learning experiences and processes during the work in the Lifestyle project.

## My position in the research

Another important methodological question regards the position of the researcher as the subject of the research. Especially the role of the researchers is important to clarify when it comes to interpreting the data. As I have mentioned earlier, I have worked in the Lifestyle project for three months and have known the respondents of the interviews in this study before it started. This inevitably will influence the content of the research as it will be processed through already an existing framework of my understanding. As I see it, my position in this situation will enable me, having worked and talked with the participants in their work (not for the research purpose), to understand to a higher degree the context that the work in Lifestyle was carried out, the type of work that the different team-members were doing, the other factors involved in their work etc.

Also, I suppose my work relation to the team-members can influence the openness of the interview participants in the discussions, either in a positive or a negative way. Thus due to my previous (short) involvement in the project I will employ a critical stance in processing the information that I will get from the interviews and the document studies.

## Data Collection and Coding Procedure

After formulating the research question, supported on Argyris and Ellströms models of learning, the next important step was to further operationalise the concepts provided by the theoretical framework.

Two central concepts were identified and defined as 'themes':

- the work situation in Lifestyle, consisting of three aspects: task, method and results and

- the learning in the project, consisting of the match- and mismatch- situations in the work, positive-/negative experience in the Lifestyle project.

## Interview Data Collection

The Lifestyle team consisted of 8 members. 6 of the permanent members were interviewed. Two of the interviewees were having additional leadership roles (management and administrative functions). The estimated time per interview was 1-1,5 hour.

### The Interview Guide

A semi-structured interview guide was constructed, based upon the aspects describing the two themes i.e. task, method and result for the work situation and the concepts of match-/mismatch of the results with the expectations and positive-/negative experience for the learning experience. (The interview guide can be seen in Annex 1 )

The interview guide consisted of several blocks of questions intended to retrieve information from the interviewees, primarily regarding these different aspects of their working situation and the aspects of their learning in the project. Another set of questions was related to clarifying the interviewees' definitions of learning (See Annex1).

To each focus question, some helping questions and comments have been added, in order to facilitate the discussions during the interviews and to draw the interviewer's attention to possible difficulties (See Annex 1 ). Some of the helping questions have been added after the first 2 interviews were done, based upon the observations in order to make the interviewer understand the questions better.

### The Preparatory Questions

The interviews were also prepared based upon the assumption that it might turn out that it could be difficult for the some individuals to talk about their own learning. The questions of the interview required in most of the cases remembering concrete situations and work settings. If the individual did not think about learning before, it required moments of reflection in order to answer the questions. For these reasons a list of preparatory questions was sent out to the interviewees before the interviews. The list of preparatory questions can be seen in Annex 2.

### Organising the Interview Data

The interviews were recorded and their content was summarised<sup>17</sup> and codified. Then, the summarised content was sent to the interviewees for confirmations and subsequent comments. A simple coding system was used to organise the interview data in order to facilitate the analysis process and the reference system. The codes contain information on:

- the **theme** which the data refers to,
- the **number of identification** of the interviewee and
- the **number of order** of the paragraph where the data can be traced.

The three **themes** were codified as follows:

- **WP** = the working process
- **LP** = learning in the project
- **LD** = definition of learning

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<sup>17</sup> The summaries contain the information most relevant for answering the research questions.

The **numbers of identification** of the interviewees are 1-6 and the **numbers of order** of the paragraphs, where the information can be found, are ranging from 1 to 20.

For example the code **LP2.1** delimits a piece of data referring to learning in the project, expressed by interviewee No 2 and can be found in paragraph 1 of the interview summary (of the interviewee No 2). Another example: **WP6.7** means that the information refers to the working process, had been expressed by interviewee No 6 and can be found in paragraph 7 of the interview summary (of the interviewee No 6).

## Document Data Collection

The document data collection was carried out through the investigation of a range of management reports, mainly covering the period of Lifestyle's activity from March 2000 - March 2003. Correspondence e-mails covering the same period have been surveyed. As the activity of the project was characterised by diversity in content and intensity, the work around the CIWs (change and improvement workshops) – which were biggest events in Lifestyle's activity, was chosen as the focus of the document study. The document data is presented in the Annex 3.

### Organising the Document Data

The three themes used in the interview data collection have been also guiding the document data collection. Thus information (in form of evaluations, thoughts, reflections) describing the work process and revealing elements of learning in the project and definitions of learning was sought in the document study.

The same three themes as in the interview study – the work process, learning in the project and definition of learning, were used for the codification system of the document data (See Annex 3). The codes also contain information about the identification of the event (CIW) and the number of the paragraph where the information can be found. Consequently the code is composed of three elements:

- the **theme** (WP, LP, LD)
- the **identification** of the CIWs (G = Gothenburg CIW, Pa = Pamplona CIW, Po = Potsdam CIW, L = Luxembourg CIW and F = Florence CIW)
- the **number of order** of the paragraph (1-15)

For example the code **WPG.6** means that the information refers to the working process at the Gothenburg CIW and can be found in paragraph 6 of the summary (of the Gothenburg CIW). The code **LPPo.4** means that the information refers to learning in the project at Potsdam CIW and it can be found in paragraph 4 of the summary (of the Potsdam CIW).

## Presentation of the Empirical Results

Below follows a presentation, which summarises and describes the results of the interview and document studies.

### The Work Process

Through the discussions with the 6 interviewees about their learning during their work in Lifestyle and in the correspondence e-mails, a clearer picture about the work process in the Lifestyle project has developed. It was only through a thorough investigation of the nature,



characteristics and structure of the work process in the Lifestyle team that the learning processes in that specific context could be traced and analysed. This reasoning has been followed both in the document survey (See Document Study, Annex 3) and in the interviews (See the Interview Guide, Annex 1 and Interview Summaries, Annex 4)

The character of Lifestyle's work was diverse. The work consisted in organising big events like CIWs, implementing a range of methods like BI, IC, Scenario Workshops, carrying out discussions with the Commission, facilitating sessions but also of routine work in the sessions and meetings like taking notes, reporting and presenting (WP1.6). The work of the team can in general terms be characterised as reacting to changing situations, shifting and unclear goals. The team did not from the beginning have the special tools for achieving the goals and objectives put by the Commission – they had to create them. Moreover they did not know the IPs they were supposed to work with (WP1.19).

An important factor in their work was the fact that all the members of the team were engaged in their basic or main work activities in their home countries and dedicated just a part of their time and efforts to the work in lifestyle (WP2.2).

When the concept for the application for the project was made, there were no clear, structured objectives of activity coming from the Commission, so it was necessary identify objectives themselves based upon some assumed needs (WP5.8). The objectives of work were first discussed and proposed by the management to the rest of the team (Interviewee 4 and 5) in lines with suggestions from the Commission represented by the Project Officers (WP5.6, WP1.7). For the period (2000 - 20002) the tasks of the project were also to be decided in cooperation with other AMs

The suggested objectives were subsequently discussed within the Lifestyle team and broken down into specific measures and activities. Frequently there were discussions in the team about which models to apply, whether to use one method or another (WP1.7, WP1.9). Once the measures and activities were defined, the partners were more or less free to handle e.g. individual sessions in their own way in order to achieve the objectives (WP5.6, WP1.7). Sometimes however this resulted in that, even though it was decided to use a common general frame, everyone used his own concept (WP1.7).

The interviewees have stressed the fact that their work Lifestyle was complicated by the fuzziness of the activity framework<sup>18</sup> and changing directives, which limited Lifestyle space of action (WP5.8, WP6.8).

## Roles

The structure of the team was quite flat, especially when carrying out the work tasks. The Lifestyle team was to some extent a self-organising team. All the interviewees qualified the team as highly professional for achieving Lifestyle's objectives (WP2.2). However when it was a matter of dealing with the Commission, especially with regards to the framework of activities and the objectives of work and when there were matters of administration of the project, there were two leaders in the team: the project manager (interviewee 4) and the project coordinator (interviewee 5) (WP2.3, WP1.7). They were most of the time working together in their leading roles.

One of the leaders (the project manager) explained that his work area was not just managing and coordinating the team, i.e. setting the tasks and having an eye on the project's economy, but also carrying out of the work tasks together with the other members of the team. He and interviewee

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<sup>18</sup> The activity framework was the rules and directives posed by the Commission in the activity of the project.

5 (project coordinator) were setting the strategy, objectives and tasks in Lifestyle, while the other members were either contributing to the definition of strategies or managing, like him and interviewee 5, the tactical choices in how to carry out the work tasks (WP4.7). In general terms he was delegating the decisions relating to the internal management of events or workshops directly to the person of the team in charge of the task with indications on the targets to reach but not too much influence on the specific tools or methods to be adopted (WP4.7).

The other leader (the project coordinator) explained that his role as a leader in the project was ‘to keep things going’, to deal and negotiate with people from the Commission, to deal with people from the IPs and to collaborate with people from the AMs (WP5.3). During the project activities he had to cope with conflicting political interests and unclear directives coming from the Commission. In his role as a coordinator he had to act as a mediator between the Commission and the project. He had to ‘make everyone work in the same direction’ (WP5.5).

The other 4 interviewees were making the diverse operative work of the project. They were more involved in carrying out the work tasks, namely in facilitating sessions, presentations, taking notes of discussions, documenting the results, and reporting (WP1.6). However, when it came to the planning and preparation of the CIWs, they took active part in discussing and deciding the objectives, tasks and methods of work (WP6.5).

Some of the team members also played the role of a linking pin between different AMs in their collaboration (WP6.5).

## Factors that determined the work process

### **Other AMs**

During the years 2000-2002, the framework conditions imposed by the Commission, made that Lifestyle had to collaborate with other AMs in providing support to the IPs. This factor strongly conditioned the Lifestyle work in terms of quality and efficiency. The interviewees expressed that involving more AMs with their specific goals, in the facilitation process, produced difficulties in managing the CIW workshop events, as every AM came with their own perspectives and methods (WP2.7). Another interviewee expressed that involving too many AMs in the organisation of such events, where every AM wanted to contribute and play a role, and where enormous time and effort was spent to find a compromise regarding the organisation of support. This was a serious mistake and was a far from optimal form for collaboration, which moreover was hindering the AMs to achieve their individual objectives (WP6.6).

### **The Commission**

All the interviewees expressed their critiques about the Commission’s actions, which often had a negative impact on the work process and the results. This negative influence was coming from the fact that the activity framework was not clear, i.e. they had no clear fundamental goals and objectives. Moreover the Commission was changing the framework of activity several times during Lifestyle activity. And finally the project officers (working in the Commission) several times intervened roughly in the course of work. One could summarise that the role of the Commission could be perceived as unclear, non-supportive and erratically interventionist.

Several of the interviewees remembers the difficulties produced (WP1.1, WP2.3, WP3.7) when, after the project has started its activity, and was successfully implementing BI and IC with the IPs, the Commission suddenly decided that they were not going to provide individual support to the IPs any more. Instead support should be provided to IPs or groups of IPs (clusters) by groups of AMs (cluster). But, which kind of support, it was not clear at that moment (WP1.2, WP4.9). They had to rethink their activities all the time, the team had to interpret what the Commission expected from them (WP2.6). Another interviewee remembered that he and the Lifestyle team

were taking responsibilities by proposing their support and expertise to the IPs, by starting to build trust relationships with the IPs. However, when the Commission suddenly came out with changed or new directives, this made it very difficult both for the AMs to follow the work they had started and for the IPs to trust the AMs when they really needed their support (WP4.3).

Another decisive influence of the Commission, upon the Lifestyle activities was the financial and juridical situation of the IPs. Lifestyle was supposed to work with the IPs, help them to cluster them and provide support. However, the fact that these IPs had to wait for a very long time to have their contracts signed by Commission, consequently created difficulties for them to engage in clustering activities (WP2.4). However, for the last generation of IPs (from the 2002 Call for proposals) this situation first changed when Lifestyle was winding up its contractual activities towards the second half of 2003. That meant that the IPs had an established budget for clustering activities, and there was no AM around to support such activities.

## The Gothenburg CIW

All the interviewees expressed to some extent a high level of satisfaction with the results of the Gothenburg CIW. It was well organised (WP2.6, WP6.6) and the results were quite positive and encouraging for the future efforts (WPG.8, WP4.9, WP5.10). However the work was difficult as the relations between the IPs and AM and between the AMs themselves were quite loose (WP1.3) and not clearly defined.

In Gothenburg CIW the team organised activities with the main objectives to start building mutual commitment between the AMs and the IPs and to prepare the ground for collaboration with the projects in terms of support. ‘Commitment’ and ‘trust’ were key principles for building a fundament for future collaboration (as was the original goal of the Commission) (WP3.3). Another key issue in the process was to find out ‘the burning issues’ in the IPs’ work, that is to find out what problems they encountered in their work, what difficulties and what needs arise in their activities. Sessions, discussion groups were organised. Particularly the interviewees 3 and 6 were engaged in facilitating the Gothenburg discussions, encouraging the IPs to open themselves and thus identify their problems and needs. At the end of the day they came with a report of ‘burning issues’ (WP3.4, WP4.9).

This was the first CIW organised by the Lifestyle team and had also the mission to define and clarify the CIW as a tool of Lifestyle methodology of knowledge transfer to and among the IPs (WPG.1). The CIW was approached as an evolving concept, which followed to be incrementally adapted and improved as a result of the feedback from IPs and the members of the AMs (WPG.3). The CIW aimed at establishing a common knowledge base in order to help and identify innovative solutions to barriers in the innovation projects, using the experiences, expertise and knowledge of the participants as a central input. (WPG.4)

The objectives of the support that Lifestyle was supposed to provide were not clear neither at the start of the workshop nor afterwards. It was evaluated in a report that ‘though clearly stated at the beginning they tended to fail in attracting a lasting impression and interest’ (WPG.8). The same report explains that it had to do on the one hand with the working methodology and its ambitions and on the other hand with the fact that the goals were not jointly set, nor communicated in advance to the IPs. ‘What was there in terms of objectives were general and quite abstract formulations about our shared interest in change, improvements, working in international innovation projects, etc, and not issues defined in terms of the day to day co-operative efforts of the Innovation projects’ members’. (WPG.8)

## Pamplona CIW

The a work process of the Pamplona CIW was described by one of the interviewees as a transition stage, from individual IP support - with very mixed results, towards more corporate and clustered forms of support (WPPa.1). The framework of activity of Lifestyle has been changed. As one of the interviewees wrote, ‘in this change process, the original contractual agreements between "us" and "them" (the Commission) still are valid, but obviously the kind of deliverables is changing, rather drastically. Our support no longer can be 'counted' in terms of the number of IPs being supported, instead we now are supposed to work with groups of IPs, in order to make our work more efficient and also more superficial. At the same time, the nature of our work - which approaches consulting work - requires us still to work in tailor-made fashion. If we really want to be effective, a tailor-made, one-on-one approach will probably deliver the best results. This is in a nutshell our problem’. (WPPa.1)

In the same discussion, another interviewee wrote that ‘what really complicates matters, is (1) the lacking guidance by the Commission and (2) competition between AMs. Both produce a lot of internal struggle, taking energy from where it should be spent. If the Commission would be able to say what they want us to do, given the new circumstances, this would have helped. (WPPa.2)

In Pamplona CIW the work process was not interactive enough. It was more like a lecture. In Pamplona the concept of ‘crew’ was introduced, meaning that the crew would consist of members from different the AMs, with different competences and tasks, but with common objectives – i.e. to provide support to the IPs. In Pamplona CIW they also introduced the ‘mover’ role, i.e. persons moving from different group works and thus informing about the work process in parallel working groups. Finally it turned out that the ‘mover’ technique could not be applied as other AMs did not want to be influenced or disturbed while performing their “linear” seminar lectures (WP4.10).

Also, the work results in Pamplona were influenced by the direct intervention of one of the project officers in the activities. One of the interviewees remembers that a project officer (from the Commission) was interfering strongly in the CIWs activities and programme, thus driving the process in a totally different direction than that intended by the organisers (WP6.11).

## Potsdam CIW

In spite of many difficulties, the team managed to provide a contribution to the Potsdam CIW. ‘A very strong team work and ability to perform almost under any circumstance (and in Potsdam we really had a quite adverse context)’, as one of the team-members writes. (WPPo.5) However, the team-members expressed their doubts about the organisation and preparation of the CIW (which was done by another AM) and the overall results of the CIW (WPPo.10, LPPo.7)

Potsdam was one of the CIWs were all the AMs were involved in the planning, organisation and carrying out of the work. The work process was described by one of the interviewees ‘... the final result (on agenda-setting) was OK’ (LPPo.2). The factors estimated by the team in the Potsdam CIW were: enough participants, good collaborative atmosphere and a good perspective of collaborative work inside and among the clusters and the. Potsdam CIW was supposed to make a transition from an introductory work towards a more advanced work towards AM methods integration, clustering the IP and supporting knowledge transfers and learning from each other (LPPo.2).

## Luxembourg CIW

In the Luxembourg CIW the team had ‘fortunately’ to organise the work ‘without the need to balance and dilute all activities with the other AMs’ (WPL.3). The team had to re-start the animation of the clustering the IPs after a long break and consider the mistakes that had been done in earlier efforts (WPL.4, WP2.8). As one of the team-members wrote, Luxembourg CIW did not look very attractive for the IPs (LPL.2), they had to reconsider their work with the IPs (WPL.4). The same team-member, who had been surveying the IPs before Luxembourg CIW, wrote that ‘...they (the IPs) understand that their experience can be precious for new projects, and are willing to participate, especially in Florence, where they would like to listen and talk about very practical issues, or better said, the usual issues in a down-to-earth rather than ‘philosophical’ way. (LPL.2).

At Luxembourg CIW the team reconsidered the configuration of the IP clusters. One of the team-members wrote: ‘although I do like the typology - technology-centered, methodology-centered, SME-centered, public service-centered - my fear is that these allocation principles may not be recognised by the Innovation Projects ... in a way, we are making the same mistake as the AM clustering discussion process has suffered from ... using abstract criteria for group formation purposes, over the heads of our target group: the Innovation Projects themselves’. (LPL.6) As a solution to this, it was suggested to have the clusters based on IPs’ competence development needs and their areas of interest (LPL. 8, WP6.14).

Despite the efforts that have been employed the team was not very satisfied with the results. They wrote in their correspondence, ‘The Luxembourg event was an intriguing one... I think we have not addressed that (non-technical competence) in a sufficiently applied way to help them meet the goals (WPL.13). ‘Interesting, many of us seem to be puzzled by our recent experiences in Luxembourg. We’ve done quite a lot, probably we did the best CIW after Gothenburg. I still feel dissatisfied with the overall results...One reason might be that (we) may not have accomplished enough... (WPL.14)

One of the interviewees evaluated the work in Luxembourg CIW as being carried out under time pressure and influenced of negative people, unclear objectives and too high expectations. The IPs were short-sighted and the Commission – hostile. The team lacked clear tasks and had difficulties to restart the process. It was too ambitious. Suddenly they had to construct a tool of competence development needs. The work on it was very stressful as everyone had his ideas and wanted to contribute. In the end the model was not so consistent. However, as he said, the team did their best in that situation (WP1.13).

## Florence CIW

In the Florence CIW the team adopted a more participatory strategy of clustering process (WPF.1), involving the IPs more actively in the organisation of the workshop and allowing more independent interaction between the IPs (WPF.1, LP1.17) In Florence the team already knew something about the IPs: their competence development needs, their interests, their problems and the active people who could potentially take initiative and drive the clustering process (WP5.11). The activities were thus organised with the involvement of active IP representatives.

The team had to safeguard that the work was kept within a certain structure, that it was performed according to the objectives, that presentations were kept in a more or less standardised format and that cluster strategies and action plans were developed etc (WPF.3). The programme allowed also a level of improvisation to the extent that the specific situations required (LPF.5). Also, the team had a higher degree of freedom, the Commission was not interfering in the work process (LP4.11)

Most of the interviewees have the opinion that the team has done its best in that CIW, under

those conditions and with the available resources. However, several of them expressed that they would have liked to have achieved those results earlier in the working process. As one of the interviewees expressed, in Florence they were much more realistic in their expectations and more focused in their activities and thus they could achieve some results that met their expectations (WP6.10).

## Learning in the Project

After the interview discussions and the document study (See Annex 4 and 3) a picture has developed on what have the team-members learnt and how did they learn during their work in Lifestyle. Most of the interviewees have expressed that they have learnt something from the project. Bellow follows a presentation of the main issues that came out of the interview and documents studies.

### Methods

#### **Business Idea, Improvement Circles, Scenario Workshops and CIWs**

In the analysis of the work system we have found out that the team had some objectives to achieve and some methods to apply. However in the application of those methods (BI, IC and CIWs) they had to develop specific tools and measures in order to cope with changes in the objectives and specific issues arising during the work process. All the team-members had some experience in the BI, IC and other participatory methods from their previous work, however applying that combination of methods in the European context implied learning new aspects of the methods. As one of the interviewees expressed that ‘looking at the whole (work) process, it was quite new for him, but the micro-process of facilitating wasn’t that new for him’(LP1.10). Thus the interviews show that all the interviewees have learnt more during their work in Lifestyle regarding business idea methods, improvement circles, scenario workshops and change and improvement workshops as methods of knowledge transfer and learning processes between the IPs (LP1.10, LP2.1, LP4.2, LP6.2).

### Group Dynamics and Project Management

Especially the leaders of the team (interviewees 4 and 5) have emphasised their learning about group dynamics in a complex and uncertain environment during their work in the project (LP5.11). Interviewee 4 (the project manager) emphasised the importance of understanding how groups of people could be managed, their needs for competence development and learning (LP4.4).

Interviewee 5 has learnt how to manage a difficult project under difficult, uncertain and changing circumstances. He has learnt to be more tolerant and the importance of delegation. He has also acquired ‘the capacity to leave people and organisations behind’ (LP5.1). Looking back at the project he concluded that he has learnt how to structure a process inside the projects: which next steps should be done in order to make the process develop. Importantly, he has learnt that people CAN do things but that sometimes you have to convince them, when they are not sure that they can do it. Sometimes there were problems of understanding and carrying out the tasks due to division of concepts on what and how to do (LP5.12).

## Working in team

Working in team both in one single place or at distance has been one of the processes that the team-members had to deal with. Interviewees expressed that they have learned from working together in one team and combining professionalism, different perspectives and backgrounds and working for achieving the best results (LP1.10, LP2.1, LP3.1, ).

## Learning by doing

Learning by doing was one of the basic forms of learning in the project. Most of the interviewees have referred to it in some way or another when they described their learning in Lifestyle (LP1.10, LP4.2, LP5.2, LP6.3). One of the interviewees explained that learning followed from managing to animate the process (clustering the IPs, building trust relationships with the IPs and other AMs) after breaks (the time span between the CIWs), with different people (new IPs) (LP4.2). He has also learnt from writing the project proposal for Lifestyle and from designing the project (LP4.4).

Another interviewee expressed that most of his learning was based upon experiences. For example he has learnt about the ‘model exercises’, which, in practice, proved to be good for the type of activities Lifestyle was dealing with. He has learned by doing the things, by trial and error sometimes. As he says ‘we were learning how to swim when we were already in the water... Otherwise you drown’. However often it was little time for reflection over the experiences acquired during the work (LP5.2).

Another interviewee explained that ‘learning in our work is very much a side effect of the work we are doing’ (LP6.3). In Lifestyle the training was on the job. Given the focus of the work in Lifestyle on methods, it was very much learning through experience. It led also to knowledge build up, gathering knowledge, even, to a certain degree of codifying the knowledge. He admits though that there were not enough possibilities to learn because the team members were engaged most of the time in organising activities and did not have enough time to reflect over the experiences. Some reflections have occurred through informal discussions with some of the team members, regarding critically the subsequent developments of the project. He concluded that the participatory approaches that they had to work with in Lifestyle, were very much ‘learning by doing’. He recognised there was a need for more reflection and discussion, but most of the time they didn’t have the time for that. (LP6.3)

## Lessons

Learning in the project has also been reflected in the discussions about the lessons that the interviewees have drawn from their work in Lifestyle.

Interviewee 1 has concluded that now, when the project has finished, he still has some doubts about the non-technical processes of the Innovation Projects (the fundamental idea of Lifestyle). He thinks that there cannot be isolated technical and non-technical issues in the innovation process. The innovation process is a combination of both technical and non-technical aspects. This separation was a mistake behind the goals and objectives of Lifestyle (LP1.15) evaluated interviewee 1. Interviewee 2 concluded that the most important in their activities was not choosing a specific technique or best practice, but understanding and creating the conditions for collaboration between the IPs (WP2.10).

Interviewee 3 concluded that a multitude of factors influenced the activity and the outcomes of Lifestyle. He says that the project was too ambitious (comprising an increasing number of

projects) and had too little resources and too many rules and interests to obey (LP3.8). The leaders of the project (interviewee 4 and 5) have learnt how to deal with the Commission. Interviewee 4 said that often he was between the Commission (which sometimes could not provide clear directives) and the team members who had their own ideas and attitudes regarding how to best carry out the work and he had to learn how to handle situations like these (LP4.4). Interviewee 5 has learnt to be careful about ambitious objectives (LP5.1).

The team has also learnt to avoid situations where the established work programme by the team is changed spontaneously by somebody who comes with authority (of the Commission), without making agreement with the team first. In Luxembourg (October 2003) and Florence (December 2003) CIWs, the team had more freedom in that sense, compared with the previous CIWs, , i.e. the project officers did not intervene so much in the programme and the process of work and the objectives were more clear (LP4.11)

Interviewee 6 has come to an important conclusion that the appropriate way to deal in a collaborative process was to have one clearly-defined leader in the process (an AM in this case). He compared the group of AMs with 'a ship with too many captains'. Thus a lot of effort was not used in a proper and productive way (LP6.2).

## Dealing with Changes

Dealing with changes was one of issues coming out from the work process, which was characterised by a continuously changing activity framework and objectives, posed by the Commission and the requirement to collaborate with other AMs (see the description of the work process above). Most of the interviewees have learned from this problem (LP2.1, LP5.11, LP4.2, LP6.2).

For example one of the interviewees expressed that in Gothenburg and Pamplona CIWs it was learning how to deal with changes coming from the Commission, collaborating with other AMs and IPs - how to deal with them in those unstable conditions in order to achieve a collaborative environment based on trust between the IPs and AMs (LP5.11). Interviewee 4 talked about adapting to change in a framework of moving targets (LP4.2)

Interviewee 6 has learned that a level of flexibility in the programme of work of such events like CIWs combined with confidence in the personal competences, can be beneficial to achieving good results. He concluded that a degree of spontaneity in the development of the activities shall be allowed to the benefit of the outcomes (LP6.6).

## Analysis and Discussion

### Defining Learning

When the interviewees' definitions of learning are juxtaposed with the definition of learning in this study they seem to have some common points in defining learning, namely that learning is a process of *acquiring something*, be it in form of knowledge (LD6.3), information, abilities (LD1.21, LP4.2), experiences (LD6.3, LD5.14, LP4.2, LD2.11) or impressions (LD5.14). Other elements of learning that came out of the discussions were the '*change in attitudes*' (LD2.11) and the '*reflection*' process (LD2.11, LD5.14, LP6.3). It also became obvious the '*experience*' character or/and the element of '*doing*' things, which they perceived as the basis of learning in their work (LD2.11, LD5.14, LD6.3).



Defining learning was not an easy question to discuss directly in a limited time, in a limited interview.<sup>19</sup> It required from the interviewee a moment of reflection upon one of his fundamental functions; it required surveying his own thinking and action, values and perception of life. It also depended on how learning aware the interviewee was, how analytic the interviewee was. Defining learning also depended on the interviewee's background: education – whether he/she has studied economics or psychology and pedagogy; the type of work they were doing etc. Depending on these factors and a range of other factors, there could be distinguished differences in defining learning during the interviews – whether it was a very practical and exact definition (LD2.11, LD1.21, LD6.3) or it was a wide, philosophical approach to learning (LD5.14, LD4.12).

Interestingly, the interviewees' definitions of learning and attitudes towards learning could be traced during the discussions in the interviews. Although there were direct questions about defining learning (See the Interview Guide) and although, when directly asked, the interviewees could not give a clear definition of learning or gave a very clearly defined answer, their attitudes towards learning, thoughts and conclusions during the discussions in the interviews could bring a lot of insight about their definitions of learning. All of the interviewees based their discussions on their learning on experiences they have been through, both positive and negative, attitudes they have taken, conclusions and lessons they have drawn from their work in the project.

Most of the interviewees talked about the importance of 'reflection' upon the experiences they have been through (LD2.11, LD5.14, LP6.3, LP4.2). They have expressed regrets that due to the character of their work and the pressure of time they hardly had any time to think over and process the information and the experiences they have been through in Lifestyle. The reflection over their activities has most of the time happened informally, in the discussions of the team-members over their work and in the preparations of the big events, like CIWs. Consequently the reflection process was one of the strong elements in the interviewees' definition of learning. Motivation and passion in work have also been emphasised by the interviewees as elements that influence their learning (LD4.12, LP3.1).

## What have they learnt?

Based on their definitions of learning the interviewees could more or less describe what they have learnt in their work in Lifestyle. As it was argued above, depending on their approach to learning, whether it was practical, rational and concrete, directly related to a specific action or function that they have done in their job or it was a general, holistic perspective on learning resulting from the specific context of their work in Lifestyle, differed the interviewees perceptions regarding their learning in Lifestyle. When asked directly what have they learnt in the project, the interviewees gave concrete examples of new methods that they have learnt, of new tools that they have developed and applied (LP1.10, LP2.1, LP4.2, LP6.2). They have also learnt about processes, like group dynamics and project management (especially the leaders of the team, LP5.11, LP4.4), negotiations (LP6.2). They have learned how to work together in one team and interact with other teams (LP1.10, LP2.1, LP3.1, LP4.4). They have also learnt how to deal with changes in their work (LP2.1, LP5.11, LP4.2, LP6.2).

During the study of the work process in the Lifestyle team two strong factors have persisted both in the interviewees' discussions about their work, and in the e-mail correspondence between the members of the team. One of them was the Commission who was the authority setting and changing, as it turned out from their experiencing, their framework of activity, i.e. their goals and objectives, creating a very unstable and difficult conditions of work. The other factor was the

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<sup>19</sup> This was the reason of sending a list of preparatory questions (See Annex 2)

other which AMs, which they had to collaborate with in their work. All of the interviewees expressed that these factors limited their work, one of them expressed even that Commission's involvement in their work process contributed rather to his non-learning than learning (LP3.1). However the other members expressed that they have learnt how to deal with these two factors – to avoid conflicting situations, interpret and confront them. In a way this is reflected by their thoughts regarding dealing with change, being flexible and improvise in their work (LP2.1, LP5.11, LP4.2, LP6.2).

When we look at the work process in Lifestyle, characterised by a diversity of functions carried out by a self-organising team, where the tasks and the methods of work were decided collectively, where a range of external factors, among which the Commission and the other AMs had the strongest influence over the course and the outcomes of their work, we see a complicated context where learning took place. Also, as it was described above, the members of the team were just partly involved in Lifestyle activities, as they were working in parallel with other projects, in other contexts. Thus, delimiting what exactly they have learnt in Lifestyle can be problematic. One of the interviewees expressed in this sense that it was difficult to pinpoint specifically what he has learned during his work in Lifestyle. Since he was engaged in parallel in other projects, where he also learnt, then it was difficult to say when, where and how learning occurred in a specific project (LP6.4).

Another important remark here is the time issue and the reflection element of learning. All the interviewees have emphasised the importance of reflection in their learning (LD2.11, LD5.14, LP5.2, LP6.3, LP 4.2). And all of them talked about the time pressure in their work and that it was never enough time to reflect over the experiences. One of the interviewees expressed that he has written reports and other records (of the activities) and he needed some time to reprocess all the information and experiences that he has gathered (LP4.2). Consequently if they have the possibility (time and will) to subsequently reflect over their activity in Lifestyle, maybe in another European project, where they will have to deal with the Commission, then it is very possible that they will discover new things that they have learnt in their work in Lifestyle. Consequently the question on what the team-members have learnt from Lifestyle remains open.

## How have they learnt?

If it was not an easy task for the interviewees to think about what exactly they have learnt in their work in Lifestyle, it became even more difficult for them to explain how they have learnt that they have learnt. Describing how they have been learning in their work, required remembering situations where they have learnt - their actions, reactions and thoughts in response to the work situations. Thus, the interview questions about how they were learning in their work have aimed to focus the interviewee's attention on specific moments in their work - on specific work tasks, on their actions and thoughts (See the Interview Guide, Annex 1).

Tracing how learning took place at each of the interviewed team-members was not an easy task for me either. It required penetrating their thoughts, examining their work context and their work process in depth for being able to understand their thinking behind their actions. As Argyris argued in his model, '...effective double-loop learning is not simply a function of how people feel. It is a reflection of how they think – that is, the cognitive rules or reasoning they use to design and implement their actions (Argyris 1999, p.128). However, understanding people's thinking, as a premise of learning, is a much more ambitious project than this paper, which requires much more academic and professional competence. What will be done here, in order to answer the research question, will be some attempts at delimiting and analysing the different elements of the single and double-loop learning (See Figure 3) in the work context of Lifestyle project.

During the discussions the interviewees used to describe their learning through doing the actual work they were supposed to do (LP1.10, LP4.2, LP5.2, LP6.3). One of the interviewees explained that: ‘learning in our work is very much a side effect of the work we are doing. In Lifestyle the training was on the job. Given the focus of the work in Lifestyle on methods, it was very much learning through experience. It led also to knowledge build up, gathering knowledge, even, to a certain degree of codifying the knowledge’ (LP6.3). That they have been learning things while doing them, in their case, applying a range of methods, which were both new and old for them, is a self-explaining argument of learning at work.

What was though more interesting to find out was how they solved the problems in their work, how they thought and acted while carrying out a work task, how they addressed the mistakes in their work, how they reflected upon them and what conclusions and lessons they have drawn. That was to trace different loops of learning that the interviewees have followed in their work. Although the model proposed in the theoretical framework (See Figure 3) of this study focused on three variables - the task, the method and the result - important was also to understand the work process and the work context they were thinking and acting in order to comprehend their choices (See Figure 3).

In Lifestyle context the hypotheses resulting from the contextualised model (See Figure 3) would be described in the following way: the work task has the objective to identify the needs of the innovation projects (IP) for competence development. In order to achieve this objective, the work task is divided in narrow work operations, one of which is to do a survey, asking the IPs about their needs for competence development. In the survey process the individual(s) has a clearly defined task – to find out the perception of the IPs regarding their needs in competence development. He (they) can either be given the methods of the survey or he (they) is responsible to find and/or choose the methods himself and deliver the results. Next, when the results of the survey are produced they are assessed with respect to their validity, consistency, added value and relevance to the task e.g. - to find out the perception of the IPs regarding their needs in competence development. Two action alternatives are possible:

1. The results of the survey are evaluated as valid, relevant and helpful for the task. Then we can say theoretically that a match<sup>20</sup> has occurred or that the results are close to value ‘success’ according to our model (See Figure 3). In this case there possibly has occurred some learning as a result of positive experience. Some questions that arise here are: what kind of learning results from positive experience? Is it not possible to single – or double-loop in case of a match, i.e. when delivering relatively good results.<sup>21</sup> Note: In real life there is almost never a perfect match (Results=Success); the value of the results will vary somewhere in-between ‘failure’ and ‘success’ (Failure <Results<Success); consequently there will be different grades of match, thus I suppose that even in case of relative match (i.e. good results, good experience) it is possible that the individual will choose to loop back and change something either the methods or both in the task and the methods (for the sake of curiosity, learning, experiment etc).
2. The results of the survey are evaluated and errors have been found, or the results proved to have no-value for the tasks or they are not relevant for the task etc. That means that a mismatch<sup>22</sup> has occurred (See Figure 3). In this case learning possibly can occur as a result of negative experience. According to the model several alternatives are possible as a result of a mismatch:

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<sup>20</sup> Match = the results meet the expectations,

<sup>21</sup> Good/successful/added-value results = when the results match the expectations

<sup>22</sup> Mismatch = the results do not meet the expectations

- the individual(s) will then choose to go back and change something in the methods used for the survey (single-loop) .
- the individual(s) will choose to go back and change something both in the task and in the method of the survey (double-loop). Note: however in professional life it is very possible that the time pressure does not allow the individual to double-loop.
- The individual(s) will choose several times to change the methods of the survey (single-loop) and after realising that the results repeatedly do not match his expectations, he (they) will choose to reconsider the task and then the method of the survey.

The idea of single- and double-loop learning is about learning from mistakes. This implies that the individual first of all discovers the mistake, understands it and then tries to correct it. Elements of single- and double-looping in the team-members' thinking and acting could be traced both in the discussions and in the correspondence to each other. In the discussions about the mistakes that they have done in their work, the lessons they have learnt, the changes they have done etc, they analysed, criticised and questioned both the methods and the tasks (objective and goals) of different work activities that they have carried out (WP2.10, LP3.8, LP4.4, LP5.1, LP4.11, LP 6.2). In the correspondence e-mails we found discussions upon the methods to be used, analysis of the methods that have proven ineffective or new methods that they have learnt in a specific event. In Report 10 e.g. we found an extensive analysis and reflection upon the CIW method and the objectives they had to achieve (WPG.8, LPG9).

Consequently elements of single- and double-looping have occurred in the team discussions over their work. During the discussions the interviewees addressed both the methods and the objectives of the work tasks in analysing the results of their work. When we look at the characteristics of their work process, which have been discussed earlier in this paper, both the objectives and the methods were set-up, discussed and decided upon collectively. Although the objectives in Lifestyle were set within a framework of activity set by the Commission, and there were leaders in the team who had decisive power, every member of the team was free to participate in the discussions and influence the task-setting procedure.

Importantly, in their task-setting they had to comply with Commission's framework of activity, which was itself unclear and unstable. This often caused faults in the team's task-setting – and all the team members addressed it in their work and in the interviews. The unclearness in the activity framework was not just causing difficulties in setting the tasks and the objectives in the team; it also made it difficult for the team-members to choose relevant, most optimal methods for these tasks. Especially this is discussed in one of the reports (Report 10).

What the findings also show is that the team-members addressed the use and the relevance of methods in their discussions in the team and were learning new methods. However, their application was often difficult to measure with regards to the tasks, which often were too ambitious, abstract and unclear. They also admitted that there were mistakes in the methods, e.g. they admitted that they allowed too little interaction between the IPs in the CIWs between Gothenburg and Florence. Or, that reconstructing a competence database in a matter of a couple of months was a too ambitious task to carry out.

When studying the loops, it turned also important to differentiate between the levels of activity in Lifestyle. Although the work in the team was very much collaborative in nature, there were two levels of activity – the collective tasks and the individual tasks. A big part of their work was done collectively: during the preparation and organisation of the CIWs e.g., everybody was involved in the planning stage, where collectively the tasks and the methods were discussed and decided upon. Then everybody was supposed to carry out individual tasks in the work sessions in order to achieve the collective objectives. Next, at the individual level, the team-member breaks the task into different task operations and applies the methods in his own way, in order to

achieve the objectives set by the team. Thus, to some extent there is task-setting and method-choosing at the individual level too. Consequently single- and double-loops have happened at different levels in the team.

In order to achieve its main objective, i.e. contribute to stimulating a process of knowledge transfer between the IPs, Lifestyle's work happened in two dimensions. On the one side the team was engaged in a thorough methodological work that took place in the team. Then Lifestyle's methodology had to be integrated with the other AMs' methodologies. On the other side they had to apply this methodology in their activities with the IPs. So, what we have here is a continuous methodology development and its application in order to stimulate a process of knowledge transfer between the IPs. In this sense it can be concluded that their work consisted mostly of solving the problem on HOW to achieve (some) knowledge transfer between the IPs. In Table 2 a summary of different methods that have been developed during Lifestyle's work is presented.

**Table 2****Summary of Lifestyle's methodological work**

	GOTHENBURG CIW	PAMPLONA CIW	POTSDAM CIW	LUXEMBOURG CIW	FLORENCE CIW
TASK	Clarification of methods Identify the IPs problems and needs Commitment & trust	Collaboration with the other AMs	Facilitate & promote IPs Clustering efforts	Facilitate & promote IPs Clustering efforts	Facilitate & promote IPs Clustering efforts
METHOD	Work sessions Discussion groups Interviews	Reconsidering the methods Crew, Mover  Four Corners Exercise  Scenario Workshops  Training sessions	Integrate the methods with the other AM's methods  Competence Clustering Database (EUclusterEucluster concept)  Suggested to use the 'Burning Issues' List + templates from other CIWs	Reconsidering the clusters  The Communication Platform (EUclusterEucluster)  Competence Clustering Database  Suggested to use the 'Burning Issues' List	Defined framework: clearer objectives  The Communication Platform (EUclusterEucluster)  Competence Clustering Database (Survey)  More interactive approach
RESULT	Burning Issues	Clusters reformed	Competence Clustering Database	?	New clusters formed
Comments	Too much planned	Not interactive – lecture like	Improvisation	Differences in perspectives  (flexibility) vsvs. structure and planning  Improvisations  Too ambitious	More interactive  More realistic

What we can see from Table 2 is a simplified picture of the methodological work that has been done by the team both in collaboration with the other AMs, from Gothenburg CIW till Potsdam CIW and as an independent AM clustering the IPs (Luxembourg CIW and Florence CIW). As we can see a great methodological work was done, where new methods were developed and old methods were reconsidered (at the expense of their work with the IPs maybe). At this point there can be concluded that a lot of problem-solving, involving double-loop learning and a great deal of feed-backing and reflections happened in this dimension of Lifestyle's work. For example the 'Burning Issues' had been a tool that has been used or referred to during the whole process of the methodological work, which means that it was a good result of their work. There are methods that proved not to be so efficient for their task like 'Mover'. And there are methods that Lifestyle have developed and improved during the whole methodological work process like, 'Competence Clustering Database', 'The Communication Platform (Eucluster)'. Consequently, in this dimension, namely the methodological work process, most of the difficult problems have happened, involving double-looping.

However, this methodological process, involving not only developing, applying and improving tools, but also integrating them into a corporate methodological body in collaboration with all the AMs. This integration was very much resented by the AM, it caused additional problems and complicated the already difficult methodological work-process. However this collaboration could not be questioned as it was imposed by the Commission. The process of methodological integration was done on the expense of the other dimension of their work – the IPs. The interviewees emphasised that it was too little interaction with the IPs, too little participative activities, too little interaction between the IPs themselves. This problem was only addressed at Florence CIW, when Lifestyle reconsidered the methods of clustering.

Also, the concept of clustering was never questioned. That is they have been developing their methods for clustering the IPs because the clusters were supposed to ensure knowledge transfer between the IPs. In this sense, it was always a single-loop cycle, developing and improving methods for animating the clustering process, although a lot of reflection was involved. Although the clustering process seemed not to show any results during Gothenburg, Pamplona and Potsdam CIWs, it was not the cluster concept that was questioned, but the methods employed and a range of other involved factors etc.

Finally, although the team strived to plan their activities in detail, often in the course of work they had to adapt to new, unpredictable dynamic situations created by an interplay of many actors – the increasing number of IPs, the other AMs, which forced them to employ all their competences and improvise for getting close to the objectives set by the team. In the correspondence especially they discuss the improvisation moments that they had to employ to solve difficult, unplanned questions. What they thought and how they acted in those difficult moments can be an interesting space of searching their single- or double-looping.

Consequently, tracing single- and double-looping and what learning resulted from it, in conditions where the framework of activity (determining the work tasks and the objectives) was unclear and changing continuously in the course of work, where time for reflection was short and where collective decision-making over the tasks and the methods of work was intertwined with individual's scope of action in the individual tasks, is quite problematic to carry out.

## Method Discussion

As a case-study, based on qualitative document- and interview analysis, the present study is an instrumental research that aimed at uncovering elements of the learning process that happen in the EIC, focusing on the learning process in the Lifestyle AM. Thus, through the analysis of the

working documents and the discussions with the project members in the interviews, it has been investigated and analysed empirically what the team-members have learnt in their work. Then, based on these empirical- and analytical findings, aspects of how learning occurred in their work were empirically and theoretically analysed. Argyris' model of single- and double-loop learning and Ellström's model of adaptive- and developmental learning have constituted the theoretical framework for analysing how the project-members have acted in the problem-solving situations in their work in the project. Subsequently, when the loops were traced a further analysis of what- and how- learning resulted from their actions and thoughts in problem-solving situations in their work was carried out.

The document study has allowed access to a big amount of data that has been useful for tracing their thoughts, questions and actions in terms of learning. Especially useful in this sense was the correspondence study, which revealed information in form of discussions, containing feed-backs, questions and thoughts that were a part of the work process. The nature of the data in the correspondence was especially precious in terms of its genuineness as it was produced as an inherent part of the work process. Here I could trace how the team-members thought in different problem-solving situations, especially in their work before and after CIWs. The data from the reports, in contrast to the data from the correspondence, was guided by the fact that it was produced for the official institutions – for the Commission. In this sense the report information provided more official type of information which made it difficult often to trace the 'what had really happened' from 'what had happened' in terms of learning. Also, the reports consisted mostly of descriptive data aiming at presenting the work process. In order to trace the learning elements, I was more interested in the evaluations of the work process which were quite scarce moments in the reports. One report though, Report 10, which was entirely analytical, has been of great help for the purpose of this study.

The interviews have also produced valuable information in terms of learning. Through the interviews I could specifically ask the project-members what they thought and how they acted in different problem-solving situations in their work in Lifestyle. It turned out though that it was not easy to talk about their own learning. Or, better said, trace exactly those thoughts that guided them in specific problems solving situations in their work. It was easy for them to generalise from their work experience what they have learnt and especially emphasize their learning by doing process. However, when it came to tracing the single- and double-looping in specific problem-solving situations it became very difficult to first, remember exactly what they thought and second, how they acted in a specific problem-solving situation. Also, another important factor was that most of their work was done collectively. When they had a problem, everybody was involved in solving it, contributing with ideas both about the task and the methods. Some of them had authority to decide upon the task and/or the methods. Thus one of the conclusions of this study was that elements of both single- and double-loops have occurred in the collective problem-solving situations in their work. However, when the problem-solving situation involves one individual, who has to take the decision, then the single- and/or double-looping might have another character.

Consequently it is important to differentiate between the levels of problem solving situations: group/team problem-solving and individual problem-solving situation. One problem that have arisen in the interviews was to make the respondent focus on a specific problem-solving situation in his work, because it was difficult to remember how exactly the situation and the thoughts developed, when it happened some time ago in the work process. One way to overcome this problem is to investigate the work process in the Scenario Workshops that the project-members engaged in their work in Lifestyle. These scenarios workshops were problem-solving situations where the individuals were expressing their thoughts about a problem in terms of scenarios of its development. If observations of these scenario-workshops had been done, then valuable information with regards to the individual/groups' single-/double looping could have been collected.



## Conclusions

Learning in Lifestyle took place in a complicated context, where the work process was characterised by a diversity of functions carried out by a self-organising team, where the tasks and the methods of work were decided collectively and where a range of external factors influenced the course and the outcomes of their work. Thus, delimiting what exactly they have learnt in Lifestyle can be problematic.

Depending on their approach to learning (whether it was practical, rational and concrete, directly related to a specific action or function that they have done in their job or it was a general, holistic perspective on learning resulting from the specific context of their work in Lifestyle), the interviewees' perceptions regarding their learning in Lifestyle differed. The interviewees have learnt new methods and tools, like business idea, improvement circles, scenario workshops and CIWs, communication (web)platforms and competence databases. They have learnt from using and improving these methods in their work, from learning by doing. They have also learnt about processes, like group dynamics and project management, negotiations. They have learnt how to work together in one team and interact with other teams. They have also learnt how to deal with changes and be flexible in their work.

Two strong factors have influenced the work process in the Lifestyle, which indirectly also have influenced their learning. One of them was the Commission, who was the authority setting and changing their framework of activity, i.e. their goals and objectives, creating a very unstable and difficult conditions of work. The other factor was the other which AMs, which they had to collaborate with in the methodological work. However, the team-members have learnt from dealing with these two factors – to avoid conflicting situations, interpret and confront them. These factors contributed to their learning in- and about dealing with change, being flexible and improvise in their work.

An important element of learning concerned the reflection over their work. All the team-members have emphasised the importance of reflection in their learning. However, due to the time pressure in their work, it was never enough time to reflect over the experiences. Consequently if they have the possibility (time and will) to subsequently reflect over their activity in Lifestyle, maybe in another European project, where they will have to deal with the Commission e.g., then it is possible that they will discover new things that they have learnt in their work in Lifestyle. Consequently the question exactly on what the team-members have learnt from Lifestyle remains open.

The team-members in Lifestyle have learnt by doing the actual work they were supposed to do. In Lifestyle the training was on the job. Given the intense methodological work in Lifestyle, they not only had to develop and improve the methods but also to apply them. This implied learning through experience. It also led to knowledge build up, gathering of knowledge, and to a certain degree of codifying the knowledge, according to the team-members. That they have been learning things while doing them, in their case, applying a range of methods, which were both new and old for them, is a self-explaining argument of learning at work.

What was most interesting to find out was how they solved the problems in their work, how they thought and acted while carrying out a work task, how they addressed the mistakes in their work, how they reflected upon them and what conclusions and lessons they have drawn. That was to trace different loops of learning that the interviewees have followed in their work. Although the single- and double-loop learning model proposed in the theoretical framework of this study focused on three variables - the task, the method and the result - important was also to understand the work process and the work context they were thinking and acting in order to comprehend their choices.

Elements of single- and double-looping in the team-members' thinking and acting could be traced both in the discussions and in the correspondence to each other. In the discussions about the mistakes that they have done in their work, the lessons they have learnt, the changes they have done etc, they analysed, criticised and questioned both the methods and the tasks (objective and goals) of different work activities that they have carried out. Consequently elements of single- and double-looping have occurred in the team discussions over their work.

When studying the loops, it was important to differentiate between the levels of activity in Lifestyle. Although the work in the team was very much collaborative in nature, there were two levels of activity – the collective tasks and the individual tasks. A big part of their work was done collectively, during the preparation and organisation of the CIWs e.g.,. Then there was the individual work, where the team-members carried out individual tasks in the work sessions in order to achieve the collective objectives. These levels intertwined in two dimensions of their work, namely the methodological, where they were developing and improving methods, and the work with the IPs, where they applied the methods. Consequently single- and double-loops have happened at different levels in the team.

Double-looping happened in the methodological work of Lifestyle. In the methodological work the team was engaged in developing, applying and improving methods and tools, in collaboration with other AMs. In this dimension difficult methodological problems were solved and reflection was employed. Single-looping happened in the team's work with the IPs, where the task of creating clusters had the objective of knowledge transfer between the IPs. However, the concept of clustering was never questioned. They have been developing their methods for clustering the IPs because the clusters were supposed to ensure knowledge transfer between the IPs. In this sense, it was always a single-loop cycle, developing and improving methods for animating the clustering process, although a lot of reflection was involved.

It can be finally concluded that although the team-members were inclined to reflection, in reality resources like time and factors like political and/or economic authorities, which intervened in their work with rules and delimitations did often not allow the team-members to double-loop. The best that can happen in such situations is single-loops and luck.

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# Appendixes

## Appendix 1. Interview Guide

THEMES	QUESTIONS	HELPING QUESTIONS	COMMENTS
	<p>Explain the objectives/questions of the research.</p> <p>This study will look at what kind of learning you engaged in during your work in Lifestyle project. It is a research a about how you learned from experiences- good and bad - during your work in the project.</p>		
Learning in the project	<p><b>How did you end up in this project?</b></p> <p><b>What did you learn during your work in Lifestyle?</b></p> <p><b>How did you learn in your work in Lifestyle?</b></p> <p><b>How did you use your learning in your work (in the project)?</b></p>	<p>How can you describe learning moments in your work in the project.</p>	Introducing questions
The work process	<p><b>Describe your work in Lifestyle</b></p>	<p>What kind of work did you do?</p> <p>Describe how did you carry out a typical work-task? Give an example.</p> <p>How much independence did you have in the work tasks (over the task itself, methods, results)?</p>	<p>What happened when changes in the objectives regarding support to the IPs were introduced.</p>

<p>Learning from positive experience</p> <p>Learning from negative experience</p>	<p><b>To what extent did the results of the work in the project match your expectations?</b></p>	<p>Can you give an example of a work-task where the results matched your expectations?</p> <p>What did your learn from it?</p> <p>Can you give an example of a work-task where the results did not match your expectations?</p> <p>What did your learn from it?</p>	<p>Warning: the respondent might not acknowledge unsuccessful results as a result of their actions!</p> <p>Ask the respondent to remember concrete experiences.</p> <p>E.gE.g. Vienna Partners Meeting (July, 2003)</p> <p>E.g Luxembourg CIW</p> <p>E.gE.g. The Potsdam Workshop</p>
<p>Match/Mismatch</p> <p>Learning</p>	<p><b>When the results of a work-task did not match your expectations, what were the reasons (problems)?</b></p> <p><b>What would you have done if the results would not match your expectations after several trials?</b></p>	<p>How crucial was the problem/ for achieving good/better results in the task?</p> <p>What did you do to improve the results?</p> <p>Did the results then match your expectations better?</p> <p>What did you learn from it?</p> <p>Can you recall such a situation in the work?</p> <p>How did you act?</p> <p>What have you learnt from it?</p>	<p>Bring in a concrete case</p> <p>Warning: Sensitive questions - the respondent might not acknowledge unsuccessful results as a result of their actions!</p> <p>Careful – hypothetical question!</p>
<p>Definition of learning</p> <p>Definition of the learning process</p>	<p><b>What is learning for you?</b></p> <p><b>How do you use to you learn?</b></p>	<p>How do you realise that you have learned something?</p>	<p>Clarifying the respondents' perceptions on learning</p>
<p>Thank you for your time and valuable information!</p>			

## Appendix 2. Preparatory Questions

Dear Claes, Lars, Bengt, Paolo, Michele and Rob,

The research question of the study is to investigate what kind of learning you engaged in during your work in the Lifestyle project. It is a research about how you learned from your experiences - good and bad - during your work in the project.

It is very interesting to study how people learn. How professionals learn in their work, under the influence of a great range of factors. In this study I am interested to find out how you thought and acted, with respect to learning, during your work in Lifestyle. It is quite possible that during the interviews interesting things will come out for yourselves regarding your thinking, learning, and behaviour.

Most of the time, we do not have that precious time to reflect over our experiences, especially when we work under pressure. Let's take an hour or two - and just remember, reflect and...learn.

Here are some of the (what- and how-) questions that we will discuss in the interview. I will not reveal all the questions here because I need some spontaneous answers to some questions. However, it will facilitate the discussion (during the interview) if you already could do a bit of thinking/reflecting earlier and especially remembering concrete examples. Thank you.

### **Preparatory interview questions:**

What is learning for you?

How do you use to learn?

How do you solve a problem?

Describe your work in Lifestyle:

- what kind of work did you do?

- describe how did you carry out a typical work-task? Give an example(s).

- how much independence did you have in the work tasks (over the task itself, methods, results)?

What did you learn during your work in Lifestyle?

How did you learn in your work in Lifestyle?

How did you use your learning in your work (in the project)?

To what extent did the results of the work in the project match your expectations?

Can you give an example of a work-task where the results matched your expectations?

What did you learn from it?

Can you give an example of a work-task where the results did NOT match your expectations?

What did you learn from it?

When the results of a work-task did not match your expectations, what were the reasons (problems)?

- How crucial was the problem for achieving a good result in the task?

- What did you do to improve the results?

- Did the results then match your expectations better?

### Appendix 3. Document Study

WORK - ACTIVITY	
CODE	Gothenburg CIW/ 2001
WPG.1	Definition and clarification of the CIW as a tool of Lifestyle methodology of knowledge transfer to and among the IPs. (Report 10)
WPG.2	The main role of the Lifestyle facilitators in the workshop process is to function as moderator, catalyst and arbitrator The work performed by the Lifestyle (LS) team was the provision and knowledge transfer of participatory supports to enhance self-learning, mutual exchange and cluster building within and among projects and their teams. (Report 10)
WPG.3	The CIW is in fact an evolving concept and will be incrementally adapted and improved further as a result of the feedback from innovation projects and the members of the accompanying measures. (Report 10)
WPG.4	... the CIW aimed at establishing a common knowledge base in order to help and identify innovative solutions to barriers in their innovation projects, using the experiences, expertise and knowledge of participants as an input. (Report 10)
LPG.5	...Our evaluations are primarily seen as an opportunity to re-think and deepen the understanding of problem dynamics, etc. on the part of both participants and staff. (Report 10/ p. 13)
WPG.6	... the possibility this renders to make a <i>continuously ongoing reformulation and adaptation</i> of the CIW technology, to make it more sharp-edged and salient as the work proceeds. (Report 10/ p. 13)
WPG.7	The planned, thorough, project-specific, individualised preparations could not be carried out. This, we believe, accounts for the experienced lack of depth and relevance. The more positive ones in that respect possibly either were the ones already familiar with our way of working, or realised that the format of the seminar could be useful in forming a common ground between Innovation Projects and getting acquainted with colleagues with similar problems. (Report 10/p.50)

WPG.8	<p>Evidently the objectives of the support were less clear both at the start of the workshop and after it. Though clearly stated at the beginning they tended to fail in attracting a lasting impression and interest. Partly, this has to do with the working methodology and its ambitions to make change in the way people perceive and act in their project work at home. To pursue that end numerous individualised interventions are introduced that may make people loose sight of the end result. Another reason may deal with the already discussed context of the workshop. The goals were not jointly set, nor communicated in advance, in the way we had intended. What was there in terms of objectives were general and quite abstract formulations about our shared interest in change, improvements, working in international innovation projects, etc, and not issues defined in terms of the day to day co-operative efforts of the Innovation projects' members. (Report 10/p51)</p> <p>In sum, the results were quite positive and encouraging for our future efforts. (Report 10/p.49)</p>
LPG.9	<p>We became aware of the last of our participants at the very point of starting the seminar. We thus had no idea of the varying needs of participants, except from possibly being curious in a general sense about what an “AC support” might be. Still we decided to go for the opportunity to market the CIW idea and make the best of the situation. It also meant a chance to demonstrate some of the basic tenets of CIW and LIFESTYLE. This may seem a serious deviation from our principles, and so of course it is. But it was not expected nor did it turn out to be decisive. For one thing, expectations were not that detailed when starting the seminar. Moreover, we could reconsider the role and function of the first seminar to become of a more introductory character than originally conceived. This will not solve the problem, only put a much heavier burden on how to introduce and get the following interactive internet process take off. It makes an already challenging task even more difficult, to save the basic character of a CIW. How successful we will be in still maintaining the basic ideals remains to be seen. (Report 10/p.17)</p>



### Appendix 3. Document Study

WORK - ACTIVITY	
CODE	<b>Pamplona CIW/2002</b>
WPPa.1	The way I see it (but I'm far from sure about this), is as follows: we may be in a transition stage, from individual IP support - with very mixed results, towards more corporate and clustered forms of support, in the future probably to much more substantial Integrated Projects. In the change process, the original contractual agreements between "us" and "them" (the Commission) still are valid, but obviously the kind of deliverables is changing, rather drastically. Our support no longer can be 'counted' in terms of the number of IPs being supported, in stead we now are supposed to work with groups of IPs, in order to make our work more efficient and also more superficial. At the same time, the nature of our work - which approaches consulting work - requires us still to work in tailor-made fashion. If we really want to be effective, a tailor-made, one-on-one approach will probably deliver the best results. This is in a nutshell our problem. (C.6/07.02) <sup>23</sup>
WPPa.2	What really complicates matters, is (1) the lacking guidance by the Commission and (2) competition between AMs. Both produce a lot of internal struggle, taking energy from where it should be spent. If the Commission would be able to say what they want us to do, given the new circumstances, this would have helped. (C.6/07.02)
WPPa.3	As interviewee 1 and his colleague were involved in the organization and reporting of the Pamplona event and we have started to set up a clustering process among IPs that will certainly require an intense networking period I would like to propose that interviewee 1 starts to perform the mini-survey for the knowledge cluster, extending it also to some projects that we perceive as potentially interested or interesting. Such a survey structure would have to be discussed with us and with Interviewee 2 (who could perhaps also continue in his facilitating role within the K-cluster) so as to identify the most suitable questions. (C.4/07.02)

<sup>23</sup> The references regarding the e-mail correspondence have been coded as follows:

C = correspondence

1-6 = No of identification of the interviewees

00.00 = Month .Year

### Appendix 3. Document Study

WORK - ACTIVITIES	
CODE	Potsdam Event/2002
WPPo.1	One thing worries me a bit. There are several database-like tools, it is obvious that they need to be integrated to some extent, at some point. (C.6/11.02) <sup>24</sup> Before:
LPPo.2	...as we have seen, also the making of a CIW agenda can be done interactively... the final result is OK. The critical success factors of "Potsdam" will be:- enough participants- good collaborative atmosphere- a real perspective of integrative work through the clusters and the AMs together Now that there won't be too many new IPs, the character of Potsdam will change: from a introductory towards a working meeting trying to give an impulse to integration, cross-fertilisation (cross-IP, -AM and -cluster) and learning from each other. (C.6/11.02)
WPPo.3	My suggestion for the Potsdam web-workshop is to use parts of the templates developed in the previous CIW workshops (especially the Pamplona one) and make minor modifications (colour, pictures, programme, etc) so as to promote a simple and sustainable (low budget) solution that can be replicated also for future clustering events. (C.4/11.02)
LPPo.4	This can be interesting and animating as people are allowed to be creative in depicting their project. It also allows those who do not have time or the resources to adapt locally to the circumstances. We just need to ask them to prepare their possible poster in text with slides, take some pictures if they have them and then they can make a collage work and write on the spot. In Gothenburg it worked extremely well and was a great ice breaker...(C.4/11.02) After:
WPPo.5	In spite of many difficulties, with our professionalism and experience we have managed to give a very strong contribution to the success of the Potsdam Change and Improvement Workshop that was held last week. A very strong team work and ability to perform almost under any

<sup>24</sup> The references regarding the e-mail correspondence have been coded as follows:

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	circumstance (and in Potsdam we really had a quite adverse context). (C.4/12.02)
LPPo.6	As our good old Jac Geurts has learnt us there is nothing like the 3 P's (Prior Proper Preparation) for events like "Potsdam", but maybe we can introduce a new adagio: Instant Immaculate Improvisation (yes, the 3 I's), as this was definitely required to make Potsdam work ... (C.6/12.02)
LPPo.7	Indeed. I think the three Ps of Jac Geurts were Proper Prior Planning whichPlanning, which is even harder than Preparation. Considering the circumstances we did quite well. I have some criticisms and know we could all do better. (C.4/12.02)
WPPo.8	...it is kind of amazing that the Commission thinks it can afford to issue these kind of directives, a few hours before the event starts (I mean no more than two organisers per AM, although basically a 12 person staff should do it) ... (C.6/12.02)
WPPo.9	I do have some integration worries, politically absolutely a must, practically however dependent on willingness to integrate. It is my impression that at this stage there is not exactly an eagerness to go for this integration ... (C.4/12.02)
WPPo.10	Hopefully, the workshop (Luxembourg) will be better organised (C.1/10.03)/prepared (C.2/10.03) than in Potsdam

### Appendix 3. Document Study

WORK - ACTIVITIES	
CODE	<b>Luxembourg CIW/2003</b>
WPL.1	...they (EC) have not been very clear (C.3/11.03) I'm basically at a loss: I don't know what he wants (C.6/11.03) <sup>25</sup>
LPL.2	...they understand that their experience can be precious for new projects, and are willing to participate, especially in Florence, where they would like to listen and talk about very practical issues, or better said, the usual issues in a down-to-earth rather than 'philosophical' way. Luxembourg doesn't look very attractive for them. (C.1/06.03)
WPL.3	This time we fortunately are organising work without the need to balance and dilute all activities with the other AMs. (C.4/10.03)
WPL.4	As far as the tasks of the team are concerned at the moment we are adopting a flexible approach where we maximise our competence and experience within the contingency planning that we have learnt to live with. We can all count on the very adaptive and experienced team and on our ability to work autonomously but reach shared results. And as we represent all the AM cluster we may also, as Lifestyle AM provide all the competence of the AM cluster we are able to provide (i.e. Gopp, Circles, CIW, EASW, Extended Business Idea and so on). I indicate the main current working areas for the team: 1. Eucluster WebtoolWeb tool 2. Clustering workshops and virtual facilitation 3. Animation and contacting projects. Methods used for clustering workshops: So for most members of our jazz team it is like playing some instruments we know very well (even if the tunes may be quite different). (C.4./09.03)
LPL.5	The Gothenburg CIW is good and was related to that period in history when we were allowed to discuss also about individual project and organisation issues in a consulting like way. It is mainly focusing on individual project problems such as project management, consortium agreement and so on. We may use some transversal elements but in the case of the forthcoming Luxembourg workshop we have to look ahead (visioning) and to the general, non-technological aspects and challenges imagining that clustering is a long term-long-term contamination process. This way of governing the AM output has been very difficult for all of us. I feel that I am learning a lot (but I have had moments of great confusion and disappointment with the whole process). Now I am curious to see where the river flows. (C.4/10.03)

LPL.6	Although I do like the typology - technology-centered, methodology-centered, SME-centered, public service centered - my fear is that these allocation principles may not be recognised by the Innovation Projects ... in a way, we are making the same mistake as the AM clustering discussion process has suffered from ... using abstract criteria for group formation purposes, over the heads of our target group: the Innovation Projects themselves. (C.6/10.03)
LPL.7	We've come to the conclusion that it's probably...to stick to our tradition of improvised CIW preparation. (C.6/10.03)
LPL. 8	A very practical way to achieve this, is the use of the Gothenburg results (where we have done such an exercise): a list of IP needs (C.6/10.03)
WPL.9	'We do not have the time for lingering discussions of the whys, whens and hows of our past performance. We must also stop with interpreting the political situation and similar things, believe in our consultative intuition based on years of experience and work hard on what we believe is long- and short-term best to our client. We do not have the time at this moment to linger into such superficial matters (interpreting political intentions)'. (C.3/11.03)
WPL.10	We haven't done much of near future planning, whereas this was highly necessary, given only one month for preparing the big bang (Florence CIW). (C.4/11.03)
LPL.11	We need to work in a more organised way. I strongly feel that we need to divide tasks and responsibilities on the bases of competences...Less improvisation. Structure. (C.4/11.03)
LPL.12	We coordinate in time, collaborate in an organised way, and be prepared! Then, we'll be much better. (C.6/11.03)
LPL.13	I have seen that the quality and way of designing new integrated projects is not so special. They are often just a patchwork. (C.4/10.03)
WPL.13	Luxembourg event was an intriguing one... I think we have not addressed that (non-technical competence) in a sufficiently applied way to help them meet this goal (C.3/11.03)
WPL.14	Interesting, many of us seem to be puzzled by our recent experiences in Luxembourg. (C.6/11.03) We've done quite a lot, probably we did the best CIW after Gothenburg. (C.6/11.03) I still feel dissatisfied with the overall results...One reason might be that may not have accomplished enough... (C.6/11.03)

### Appendix 3. Document Study

WORK - ACTIVITY	
CODE	<b>Florence CIW/2003</b>
WPF.1	Task: The Lifestyle Team will have to perform a difficult balance act: on one hand we are supposed to support and assist a participant driven process (in the clustering process)...on the other hand...that we drive this process in certain directions. (C.4/11.03) <sup>26</sup>
WPF.2	...the LS (Lifestyle) task in Florence will have to be very much of a 'subsidiary' facilitation service...We will have to create the conditions for their (IPs) work. (C.4/11.03)
WPF.3	Method? We will...have to be the guardians for that work is kept within a certain structure, that it is performed in certain general step, that presentations are kept in a more or less standardised format and keep the objective clear, that there must be developed cluster strategies and action plans before the Wednesday's presentations. In stress again the word strategies as in strategic objectives, because it would not be enough with a simple list of not contextualised actions to perform. (C.4/11.03)
LPF.4	As the Luxembourg experience showed, we as LS team should arrive with a general consensus about most whats, whens, hows and preferably whos, when we come together in Florence. (C.5/11.03)
LPF.5	We must of course, as always be prepared to improvise, but the alternatives should be well planned. (C.5/11.03)
WPF.6	We should have some written general 'manifesto' about what clustering is supposed to be in the context – in straightforward language – also defining the expected outcomes of Florence and ...what can/should happen afterwards. (C.5/11.03)

## Appendix 4. Interview Data

### Interviewee No 1

*Role in Lifestyle: workshop and session facilitation, cluster facilitation, clustering tools development.*

INTERVIEW DATA	CODE
<p>There have been several phases in the development of this project. At the beginning I was involved in carrying out business ideas that were kind of strategic models – introduced by a Lund professor, Richard Norman. These business ideas would have applied to a set of innovation projects (IP). However, the Commission decided subsequently that we were not going to provide individual support to the IPs – we were an accompany measure, not a consulting measure. So, they made attempts ‘to clusterise’ (group) the IPs according to (not sure) the project officer, or according to a general topic. He concludes that it was a mess in that moment.</p>	WP1.1
<p>These changes affected the work of the Lifestyle team. He remembers that he was supposed to carry out a number of business ideas, but after three business ideas they were told to change their orientation. So, no more work on business ideas with individual IPs. The team was supposed to provide a group of IPs with support. But, which kind of support, it was not clear at that moment.</p>	WP1.2
<p>The main idea in Gothenburg CIW was that there was a super AM team of accompany measures helping the clusters and the Commission. But it didn’t work, because the relations between the IPs and between the AMs themselves were too loose. This was a central phase for Lifestyle (Between Gothenburg 2001 and Potsdam 2002), when there were a lot of problems, especially regarding the expectations from the Commission, the objectives to be achieved and the next steps to be done. He can’t remember anything useful results from that phase.</p>	WP1.3
<p>The usual work process was linear. In his work on business ideas with the IPs, he had to gather preliminary information about the field, then about the IPs. When he was visiting the individual IPs, he gathered information through documentation and interviews. Then he elaborated and sent some kind of preliminary results to the coordinators. When they agreed more or less on the results, they presented it in a project meeting. There was someone from LS (Lifestyle) helping him in the delivery stage, but at the end he was delivering something for the discussion to the project.</p>	WP1.4
<p>When the objectives of work changed, as there were no more fixed, pre-defined tasks, everyone had to find a different role for himself. His role was to handle the facilitating activities with the IPs. Other partners (Interviewee 6, Interviewee 3) in that phase were trying to design the CIWs according to these new conditions. The general conditions were set up by the Commission. Then, they were discussed inside the team.</p>	WP1.5
<p>Lifestyle team was based on some type of self-organisation. The character of work was quite diverse. The work consisted in organising big events like CIWs, carrying out discussions with the Commission, facilitating sessions but also of routine work in the sessions and meetings like taking notes, reporting and presenting. He was involved more actively in the operative work as facilitating sessions, taking notes of discussions, documenting the results, and reporting.</p>	WP1.6

<p>The objectives were proposed by the management team (Interviewee 4 and 5) in accordance with the Commission. Then these objectives were discussed in the team and decided upon the specific measures. As interviewee 1 expresses, ‘sometimes there were discussions about which models to apply, whether to use more scenarios, or other models. When it was decided upon the measures the partners were more or less free to handle the individual sessions in their own way in order to achieve the objectives. Sometimes however it turned out that, even though it was decided to use a common frame, everyone used his own frame.</p>	WP1.7
<p>In deciding how the tasks would be carried out, the expertise and know-how had the authority in choosing techniques and methods. It was a kind of adaptation practices to the new conditions, says interviewee 1. However, he stresses that he never had the authority to change the objectives decided or posed by the team. He brought examples where incidents were possible during the work process, when the perceptions on how to achieve the objectives of the task were different from the partner who was working with him in the same session.</p>	WP1.8
<p>One important factor in the work process was that it was a collaborative behaviour and decision making upon the ways to carry out the tasks. The tasks and methods of work were discussed in the team. After Gothenburg CIW for e.g. he remembers that they were discussing the work process in an evaluation meeting, where they used a kind of transactional analysis, involving reciprocal feed-back over the activities, discussed how the IPs behaved in the activities, about the correlation with the objectives put by the team and the Commission.</p>	WP1.9
<p>Interviewee 1 says that he has learned a lot of things during the work in the project. As he says ‘looking at the whole process, it was quite new for him, but the micro-process of facilitating wasn’t that new for him. He learned many things at several levels. Lifestyle was his first European project, working with the European Commission. He learned about the methods: business idea, circles, and scenario workshops. In Lifestyle, he has learned how to design scenarios. Learned about working in the team combining professionalism, different perspectives and background and working on achieving the best results. He has learned in his work by doing it, discussing and dialoguing with the team partners. At the end of the CIWs there was always a meeting for discussion of the work that has been done and what followed to be done.</p>	LP1.10
<p>At the operational level, where interviewee 1 was working, there were seldom dissensions. The differences in perspectives emerged sometimes between the strategic and the operational partners in the team. Conflicts were emerging in the team because of changing goals. As he says, everyone in the team was experienced enough to do his own job well: facilitating, interviewing etc. What was really new and difficult was what they had to do there and then. It was a matter of collective reasoning. The most difficult thing was not how to carry out a piece of work, but how to make a sense of all the stuff.</p>	WP1.10
<p>Big mistakes: in teaching the IPs business idea. He thought that the mistake was to accept to collaborate with another AM in this activity. Another mistake the prepared material was not good enough. Another mistake was not regulating efficiently the work in the time. He realises that he could do better in that session. Another mistake in the work was that he was not given enough information about the task. The task was to prepare material on business ideas. He recognises that they were faults in his work on that tasks, that he should have talked more with more members of the IP and get the complete information about the objectives.</p>	WP1.11
	WP1.12



<p>Luxembourg was the event where he is most unsatisfied with the results of the work. Luxembourg CIW was carried out under time pressure and influenced of negative people, unclear objectives and too high expectations. The IPs were short-sighted and the Commission – hostile. The team – lack of clear tasks, difficulties on working again on this task. Too little resources (time and money) for the following of the results that has been produced by the work: competence model, an electronic platform. Too ambitious. The work was stressful as everyone had his ideas and till the end everyone wanted to contribute. Risk to loose the consistency. In the end was a stressful an inefficient model. He concluded that if the model had a more defined scope and character measuring the individual and organisational competences in the IPs), that it would have had better results. Thinking about the Luxembourg results – the general results were not so successful because of general negative conditions. However, the team did their best.</p>	WP1.13
<p>He regrets also the fact that project officers (Commission) in Pamplona intervened in the work between the IPs and the AMs. Political manoeuvres.</p>	WP1.14
<p>Now, when the project has finished, he still has some doubts about the non-technical processes of the Innovation Projects (the fundamental idea of Lifestyle). He thinks that there cannot be isolated technical and non-technical issues in the innovation process. The innovation process is a combination of both technical and non-technical aspects. This separation was a mistake behind the goals and objectives of Lifestyle.</p>	LP1.15
<p>He brings an example of an outcome of the work which was a platform of communication between the IPs, First Class. In principle it was a good idea and it was well designed, but it needed further maintenance in order to be effective, and in this aspect the AMs failed.</p>	WP1.16
<p>He remembers that another mistake was that they (the team) did not work enough to improve the circulation of ideas between the IPs. As he says ‘we were always talking too much to them (IPs) and not letting them (IPs) talk with each other’. We were talking too much! And only in Florence CIW they (Lifestyle) gave them (IPs) possibility to talk and feedback each other.</p>	LP1.17
<p>A big limit of the project was that the project was not supposed to deliver concrete services to the IPs when they were sought by the IPs. In his opinion the project dealt with too undefined and too high processes, which were far from the real problems of the IPs. And when an IP turned for some specific help to Lifestyle, they could not really provide it, as they were instructed by the Commission not to provide support to individual IPs.</p>	LP1.18
<p>He describes the team's work as reacting to changing situations, shifting, unclear and unclear goals. They did not have the special tools – they had to create them. Moreover, they didn't know the IPs sufficiently enough (with their specific characteristics).</p>	WP1.19
<p>Next time he will make sure about the rules of the game (referring to his session work in Pamplona). Another important lesson was that he has learned about his abilities to facilitate.</p>	LP1.20
<p>His definition of learning – acquire ability to understand, decide and do.</p>	LD1.21

## Appendix 4

### Interviewee No 2

*Role in Lifestyle: workshop and session facilitation, cluster facilitation, clustering tools development.*

INTERVIEW DATA	CODE
<p>The discussion with interviewee 2 started on the issues that he has learned in Lifestyle. He has named a lot of issues that were new for him during the work in Lifestyle, like collaborating with people from different cultures, with different backgrounds, issues related to working in and with European Projects, dealing with the Commission, dealing with complexity and change.</p>	LP2.1
<p>He qualifies the team as highly professional and competent for achieving Lifestyle's objectives. However an important factor in their work was the fact that all the members of the team were engaged in their basic or main work activities in their home countries and dedicated just a part of their time and efforts to the work in lifestyle.</p>	WP2.2
<p>Another factor has influenced Lifestyle's activity was the Commission as an authority setting the rules. An authority, which was acting politically as well. The AMs, like Lifestyle, were created with the aim of helping the Commission to handle the IPs and thus the innovation in Europe. The AMs were expected to facilitate relations between the IPs themselves and between the IPs and the Commission. Thus the AMs were working between the Commission and the IPs, under the Commission's directions. In Lifestyle there was the management of the team (Interviewees 4 and 5) who were dealing with the Commission and deciding together with the Commission upon the objectives to be achieved by Lifestyle.</p>	WP2.3
<p>On the other hand there were the IPs, which had juridical and financial difficulties resulting from not having their contracts signed by the Commission. In this condition the IPs and the AMs were in a relation of dependence from the Commission.</p>	WP2.4
<p>The outcomes of the first CIW events and the lack of activities between the subsequent events caused some a kind scepticism in the IPs for the collaboration. As he expresses that after the first CIWs (Gothenburg, Pamplona and Potsdam) IPs regarded the AMs as Commission's agents and participation at CIWs as places and activities encouraged by the Commission. So, they came there because the Commission wanted it. However, according to him, the collaboration did not move further than the CIWs.</p>	WP2.5
<p>He has described the development of the events in Lifestyle. Gothenburg event was a well-organised event, as he assesses. This was the first event, which gathered a number of IPs in one place with some objectives to achieve. According to him, the Gothenburg CIW has produced some outcomes. However, after this event, directions came from the Commission, which was obviously changing the course of activities. Besides the shifts in directions, the Commission was not clear about the objectives that had to be achieved, which made the organisation and planning of further activities very problematic. As he remembers, they had to rethink their activities all the time, the team had to interpret what the Commission expected from them. As he says, this uncertainty and fuzziness at the strategic level made the activity of Lifestyle very problematic in terms of achieving a collaboration between the IPs.</p>	WP2.6

<p>A consequence of a shift initiated by the Commission in the initial phase of the project was that the AMs had to work in collaboration with each other in their work with the IPs. Involving more AMs with their specific goals, in the facilitation process, produced difficulties in managing the CIWs as every AM had their perspectives of doing things and also the AMs were competing with each other, factors which contributing to the failure of the Potsdam CIW.</p>	WP2.7
<p>After subsequent shifts in the conditions and objectives Lifestyle remained the only AM to deal with the IPs and make one more attempt to encourage cooperation between the IPs which now was supposed to take the form of clustering processes. According to interviewee 2 the unclarity of the Commission's directives was still in place, and hard to manage the working process and producing some fruitful results. Moreover, there was not so much time left till the end of the project. The project actually finished earlier, but it got a prolongation until the end of 2003. The last two efforts were Luxembourg and Florence CIWs were Lifestyle team has tried to improve the relations with the IPs and correct some of the previous mistakes.</p>	WP2.8
<p>He brings an example of Lifestyle's work in the creation of an electronic platform for communication between the IPs. He compares the first platform (First Class) with a last one (Eucluster) that has been produced in Lifestyle, which was more complete and more effective than the former. It aimed at engaging the IPs more actively, though creating possibilities for forums of discussions, emailing, space for posting information about the IPs activities, but also an important database containing contact information and description of different IPs. However, interviewee 2 expresses that follow up of this specific tool is only possible with financial support and it is not sure that it will survive without Commission's support.</p>	WP2.9
<p>According to him, the impact of the results of Lifestyle activity is impossible to evaluate at the moment. He sees Lifestyle activity as a part of a bigger process – of collaboration between the IPs (Commission's visions), and the effects of their work will maybe be seen with the time. He concluded that what was important was the engagement itself, to be a part of a bigger, (maybe) new process and do your best, even in such in such changing conditions and with unclear goals. He concludes that important issues (problems) in their activities was not choosing a specific technique or best practice, but understanding and creating the conditions for collaboration between the IPs.</p>	WP2.10
<p>He talked about experience-based learning. Reflection (happening in evaluation meetings also). Learning is change in attitudes, behaviour.</p>	LD2.11

## Appendix 4

### Interviewee No 3

*Role in Lifestyle: workshop organisation and session facilitation, cluster facilitation, clustering tools development.*

INTERVIEW DATA	CODE
<p>When asked whether he has learned something from his work in the Lifestyle project. He answered both yes and no! The activities of the project did not bring to him intellectual added-value. As he expressed he experienced rather non-learning than learning. On the other side he has accumulated experience in working with a team from different cultures and backgrounds. As he expressed, in the beginning of the project there was a challenge to work with such interesting people, produce something together. He was very enthusiastic in the very beginning, meeting in the Lifestyle team people from different cultures, but who were doing the same job as him – consulting. He has worked with some of the Lifestyle partners in ana European project before and the experience and the contact from this project were some of the reasons that motivated him to continue to work in other European projects.</p>	LP3.1
<p>Talking about Lifestyle outcomes he expressed his regrets for the final outcomes of the project. When asked why he thought so, he has brought out a range of factors that influenced, even destroyed, the possibility of accomplishing better results, in his opinion. A strong factor that has played a central role in the development of Lifestyle activities was the Commission who in this situation was having the role of the financing source, decision authority and political authority. According to him the Commission, or more exactly the people representing the Commission, tried to control the whole process: the objectives, the methods and the outcomes of the activities. In this sense, he evaluated the project’s outcomes as inefficient, the goals unachieved.</p>	WP3.2
<p>As he expresses, at the beginning of Lifestyle activity there were goals and objectives, which the team started to work on. In Gothenburg CIW he together with interviewee 6 have planned and organised different activities with the main objective: to start building commitment with the intention (objective) of building collaboration between the projects at the European level. According to him ‘commitment’ and ‘trust’ were key principles for building a fundament for future collaboration (as was the original goal of the Commission). He and his team partner (interviewee 6), have had this objective in their minds when they have met about 20 IPs in Gothenburg.</p>	WP3.3
<p>The next key issue in the process was to find out ‘the burning issues’ in the IPs lives, that is to find out what problems they encountered in their work, what difficulties and what needs arose in their activities. Sessions, discussion groups were organised, interviewees 3 and 6 engaged in facilitating discussions, encouraging the IPs to open themselves and thus identify their problems and needs. There were IPs who volunteered to help them to record the outcomes of the discussions and make a report. At the end of the day they came with a report of ‘burning issues’.</p>	WP3.4
<p>During the work in Gothenburg CIW, especially in the discussions with the IPs, he did not consider favourable Commission’s presence in those meetings, due to the fact that the Commission’s role would influence IPs openness. He intended to present to the Commission the outcomes of those sessions. And he considered that he and his colleague had the competence and the authority to decide over the form of the activities...and the Commission would be presented with the results.</p>	WP3.5

<p>The report was written and presented for consideration to the whole Lifestyle team and to the Commission. For reasons, not yet completely understandable, this report was never discussed neither in the team nor has he received any feed-back from the Commission. He has been said that it was not in accordance with the objectives and that it was too early to come with such a project. This situation influenced strongly his attitudes for future work in the project. At this moment he became aware of some big differences between his perspectives on goals, objectives, the way to achieve them and the results. He perceived that the Commission influenced the whole process and influenced it towards apparently decided paths. Interviewee 3 has learnt also that there were partners in Lifestyle who did not agree with his ideas and methods, who, as he learned, played on the Commission's rules.</p>	<p>WP3.6</p>
<p>He has adopted an attitude: to be quiet and follow the orders from above. He says that he continued working with three IPs under the objectives posed by the team, in collaboration with the Commission, but these activities did not come to result. Subsequently, the Commission were posing some unclear objectives, which worsened the conditions of work. The other big events that followed have had little or no result at all. The Potsdam CIW was the worst. He had a feeling that everyone was playing. The IPs came to the event because they realised that that was the Commission that wanted them to. He concludes that a forced collaboration is not collaboration and it will never arise in those conditions.</p>	<p>WP3.7</p>
<p>He concluded that a multitude of factors influenced the activity and the outcomes of Lifestyle. He says that it was too ambitious (comprising an increasing number of projects) with too little resources and too many rules and interests to obey. He is convinced that he has not learnt anything in professional terms in this process.</p>	<p>LP3.8</p>

## Appendix 4

### Interviewee No 4

*Role in Lifestyle: project manager, team coordination, plenary and workshop facilitation workshop organisation, cluster facilitation, clustering tools development.*

INTERVIEW DATA	CODE
<p>Interviewee 4 presented in short the idea of the project and the circumstances under which Lifestyle AM emerged. The call for proposals coming from the Commission was asking for projects that would provide support to a community of innovation projects (IP). The proposals emphasized that the support should aim at non-technical issues of the IPs. As he remembers the call for proposals contained quite general ideas regarding the type of support that was needed. In the case of Lifestyle the support was based on the improvement circle, the business idea, the European Awareness Scenario Workshop (EASW<sup>27</sup>) methodology, the CIW and other tools.</p>	WP4.1
<p>During his activity in Lifestyle he has learned how group dynamics work in a complex and uncertain environment. He has written reports and other records and he needs some time to reprocess all the information and experiences he has gathered. He has learned from the work in the Change and Improvement Workshops (CIW), by making the crews (working groups composed of different AMs) and by adapting to change, in a framework of moving targets. Learning followed from managing to animate the process (clustering the IPs, building trust relationships with the IPs and other AMs) after breaks (the time span between the CIWs), with different people. It was interesting to work with different people. And also to deal with the moving targets set by the uncertainties of the strategic, policy setting of the innovation programme<sup>28</sup>.</p>	LP4.2
<p>However, there were difficulties as well. Sometimes it was difficult when the goals and the directives from the Commission were changing. He remembers that he and the Lifestyle team were taking responsibilities by proposing their support and expertise to the IPs, by starting to build trust relationships with the IPs. However, when the Commission suddenly came out with changed or new directives, it made it very difficult both for the AMs to follow the work they had started and for the IPs to trust the AMs when they really needed their support.</p>	WP4.3
<p>There were also internal tensions and technical problems with building an effective tool for communication with and between the IPs.</p> <p>He learned a lot from writing the project proposal for Lifestyle, about designing the project, about the partners and their potential. Understanding how could groups of people be managed, their needs for competence development and learning. When the project started there were just 15 IPs. As a coordinator and leader of the team, he had also to learn to deal with highly skilled professionals. Often he was between the Commission (which sometimes could not provide clear directives) and the team members who had their own ideas and attitudes towards how to best carry out the work. He had to learn how to handle</p>	LP4.4

<sup>27</sup> For more information regarding the EASW methodology see <http://www.cordis.lu/easw>

<sup>28</sup> The innovation programme started a restructuring process half way through the duration of the Lifestyle AM and this created a relatively difficult context into which to operate. The innovation programme has been closed down and its projects have been taken over by the IST programme since 2003.

situations like these.

He has learnt from the Lifestyle colleagues, who had to combine their competences in the work tasks. He brings examples when he was working with his colleagues in different activities and learning specific techniques such as the improvement circles, the business idea or, for example, on mapping different support activities and analysing their impact in time for specific IP. But also he has shared his skills and knowledge regarding facilitation methods with his colleagues. He has learned also about the goal-oriented project planning (GOPP) technique.

LP4.5

Interviewee 4 has been learning from other AMs. During their activity there was a period when they collaborated through a cluster of AMs. Thus there has been learning on how to cope with other AMs, which had to find a common approach to providing support to the IPs. He was actively involved in the coordination of the AM cluster: he helped the various AMs develop a matrix of competence and a flow-chart of supports so as to organise the accompaniment to projects in a coherent way.

WP4.6

His work area was not just managing and coordinating the team, i.e. setting the tasks and have an eye on the project's economy, but also carrying out of the work tasks together with the other members of the team. He and interviewee 5 were setting the strategy, objectives and tasks in Lifestyle, while the other members were either contributing to the definition of strategies or managing, like him and interviewee 5, the tactical choices in how to carry out the work tasks. Often there was a collaborative process over deciding the tasks and the methods of work, where the whole team was discussing the objectives, the work tasks and the methods. The work usually was divided according to competences. In general terms he was delegating the decisions relating to the internal management of events or workshops directly to the person of the team in charge of the task with indications on the targets to reach but not too much influence on the specific tools or methods to be adopted. He only performed an ex ante and an ex post check and never influenced the ex durante operationality.

WP4.7

The results of specific CIWs did more or less met his expectations, considering the condition in which the team had to work. Every CIW was a challenge. The Lifestyle team, has however always tried to do its best. The Potsdam one was probably the most problematic, where the biggest conflicts were between the Commission and the AMs (local organisers from the Showcase AM), which had also an impact on the IPs. The Potsdam event (December 2002) coincided with also with the critical period of the innovation programme restructuring process and therefore it was not attended by any EC officer.

WP4.8

Gothenburg CIW had probably the best results, setting up a common task for the AMs' collaboration, the IPs were also interviewed regarding their problems and needs in competence development. Good results were achieved then also thanks to a close collaboration with the EC project officers. However, the following work was depending on follow up activities, between the CIWs, which was not so good sometimes, and which was a factor of Potsdam's CIWs results. The unclear and diverse visions coming from the Commission (more than changing they were diverse, with greater or lower influence from one vision or another on what the role of the AMs should be) was another strong factor in that period, which influenced the work of the Lifestyle team and the results. Another factor in that period was internal changing in the coordination of the Lifestyle project. He concludes 'all the battles were won, but not the war'.

WP4.9

LP4.9

<p>The venue, logistics – work-friendly environment were technical factors that influenced the work. There were problems with other teams – realising that it was an excess of AMs. In Pamplona CIW, for e.g.e.g., the process was not interactive enough. It was more like a lecture. In Pamplona the concept of ‘crew’ was introduced, meaning that the crew would be consisting from different members of the AMs, with different competences and tasks, but with common objectives – i.e. to provide support to the IPs. Also in Pamplona CIW they have invented the ‘mover’ role, which was a person moving from different group works and thus inform about the work process in parallel working groups. Finally it turned out that the ‘mover’ technique could not be applied as other AMs did not want to be influenced or disturbed while performing their “linear” seminar lectures.</p>	WP4.10
<p>Another incident happened when Lifestyle was working based on the principle of clustering (grouping) the IPs according to the demands from the IPs, and an EC project officer was ‘pooling’ some people (the IPs) to a working group where he thought they should belong, there by influencing the “demand driven” nature of the activity. Then, it was an open disagreement between the Commission and Lifestyle regarding the clustering of different IPs. They have learned that they should avoid situation like those, when the established work programme by the team is changed spontaneously by somebody who comes with the authority of the Commission, without making agreement with the team first. He compares Luxembourg (October 2003) and Florence (December 2003) CIWs, where Lifestyle had more freedom in that sense, i.e. the project officers did not intervene so much in the programme and the process of work and the objectives were more clear.</p>	LP4.10
<p>Defining learning: learning is connected with passion. Being able to put aside the background and experience and look at the new phenomenon as a ‘child’.</p>	WP4.11
	LP4.11
	LD4.12



## Appendix 4

### Interviewee No 5

*Role in Lifestyle: administrating the project, workshop and clustering organisation, cluster facilitation, clustering tools development.*

INTERVIEW DATA	CODE
<p>Interviewee 5 has the complicated role in Lifestyle. He had to administrate the finances and reporting of the project, he had to coordinate the activities inside the project and to deal politically with the Commission representatives. Due to his specific role interviewee 5 has learnt how to manage a difficult project under difficult, uncertain and changing circumstances. He has learnt to deal with crises. He has learnt to be more tolerant and the importance of delegation. He has also acquired ‘the capacity to leave people and organisations behind’. He explained that in conditions of a collaborative work where a big number of actors are involved (AMs, IPs), you have to know how to cooperate efficiently with people and organisations (behind the IPs and the Commission). He has learnt to be careful about ambitious objectives. He remembers especially a good cooperation with Strategist AM and Eco Innovation AM in their work.</p>	<p>WP5.1  LP5.1</p>
<p>Most of his learning was based upon experiences. For example he has learnt about the ‘Model exercises’, which, in practice, proved to be good for the type of activities Lifestyle was dealing with. He has learned by doing the things, by trial and error sometimes. As he says ‘we were learning how to swim when we were already in the water... Otherwise you drown’. However often it was little time for reflection over the experiences acquired during the work.</p>	<p>LP5.2</p>
<p>His role as a leader in the project was ‘to keep things going’, to deal and negotiate with people from the Commission, to deal with people from the IPs and to collaborate with people from the AMs. It is difficult to say what exactly he was learning from others. As he says it was more of learning together with others.</p>	<p>WP5.3</p>
<p>One of the important things that he learnt in Lifestyle was mastering the internet as a way of communication. Communication system is very important for work in such projects. Internet was the central tool for communication in the Lifestyle team, as the partners were living and working basically in different countries, but also was one of the main connections with the other AMs and the IPs. He acknowledges that his skills of using internet and other software are much more advanced now.</p>	<p>LP5.4</p>
<p>A part of his work in the project was to deal with the Commission. During the project’s activity he had to cope with conflicting political interests and unclear directives coming from the Commission. In his role as a coordinator he had to act as a mediator between the Project Officers of the Commission and the Project Managers of the IPs. He had ‘make everyone work in the same direction.’ As a leader of his team he encouraged participatory collaborative learning. In the team they used to discuss the team’s actions. Circle methodology was used.</p>	<p>WP5.5</p>
<p>Regarding the task-setting, he and interviewee 4, after consulting the Commission, discussed the objectives and the tasks preliminarily. Then the tasks and the objectives were brought for discussion in the team, were all the partners were contributing with opinions, comments and expertise. Finally, when the tasks were decided, the partners were competent enough to do and decide how carry out the tasks themselves.</p>	<p>WP5.6</p>

<p>Due to the changing directives from the Commission the framework of activity was constantly changing. Thus the programme of activity was changing as well, which required often a degree of improvisation from the partners during their work with the IPs. This however generated sometimes difficulties to collaborate in specific tasks.</p>	WP5.7
<p>The work was complicated by the fuzziness of the activity framework and the objectives. As Interviewee 5 remembers, when the application for the project was made, there were no clear, structured objectives of activity. He and interviewee 4 had to identify the objectives themselves. The tasks of the project were then decided in cooperation with other AMs, as the Commission demanded collaboration between the AMs.</p>	WP5.8
<p>The Lifestyle project was prolonged from March, 2003 until December, 2003. It was the only surviving AM, which had to provide support to a new generation of IPs. So now it was Lifestyle alone that was setting the tasks in collaboration with the Project Officer and executing them.</p>	WP5.9
<p>Interviewee 5 evaluates the results achieved at Gothenburg CIW only as partially successful because the CIW was too pre-programmed. However the participants (the IPs) were quite happy with Gothenburg results. In the autumn 2003 (Luxembourg and Florence CIWs) the project had the possibility to show what could have been done better. As he assessed the conditions of work were better – they have learnt better the Commission's directions, they have knew the IPs problems better; there were no other AMs in leading the support activities, they have improved the system of communication between the IPs. Also an important factor was that the IPs (from the 3<sup>rd</sup> generation) had a budget for clustering activities, thus making their participation affordable in terms of resources. Another factor was the time pressure, which urged them to be more focused in their activities.</p>	WP5.10
<p>He says that the work involved a lot of learning. In Gothenburg and Pamplona CIWs it was learning how to deal with changes coming from the Commission, learning the about other AMs and IPs - how to deal with the them in those unstable conditions in order to achieve a collaborative environment based on trust between the IPs and AMs, but also learning how to deal with political factors (conflicts) from the Commission. In Luxembourg and Florence CIWs they had clearer objectives, they already knew about the IPs needs, they knew the active IPs representatives and the process of clustering could be better coordinated.</p>	LP5.11
<p>Looking back at the project he concluded that he has learnt how to structure a process inside the projects: which next steps should be done in order to make the process develop. Importantly, he has learnt that people Can do things and that sometimes you have to convinced them, when they are not sure that they can do it. Sometimes there were problems of understanding and carrying out the tasks due to division of concepts on what and how to do.</p>	WP5.11
<p>In a potential further activity of the project interviewee 5 said that he would have liked to have a changed situation with the Commission, i.e. that they should have a clearer idea of what they expect from the project. The Commission should provide a clear framework for activity. Also he would have liked to have achieved earlier the results from the end of the project. Also, he would have made some changes in the leadership structure of the team.</p>	LP5.12
<p>In a potential further activity of the project interviewee 5 said that he would have liked to have a changed situation with the Commission, i.e. that they should have a clearer idea of what they expect from the project. The Commission should provide a clear framework for activity. Also he would have liked to have achieved earlier the results from the end of the project. Also, he would have made some changes in the leadership structure of the team.</p>	LP5.13
<p>For him learning is much more than a conscious process. Learning happens all the time. He talked about implicit and explicit knowledge and learning. It is the integration of impressions, information and experiences in the mind, in order to have the possibility to reuse it later. Learning can be many things: trial and errors, reflections, experiencing, doing. Learning is quite contextual.</p>	LD5.14

## Appendix 4

### Interviewee No 6

*Role in Lifestyle: workshop organisation, workshop and plenary facilitation, clustering tools development.*

INTERVIEW DATA	CODE
<p>Interviewee 6 role in the Lifestyle project was confined to the methodological aspects. He was involved earlier in EU projects and had experience of work with participatory approaches and interactive methods. His input in Lifestyle was expected to be methodological. Parallel he had to participate in the organisation of different seminars and workshops (CIWs). In parallel he was involved in another AM – Strategist, which was focusing on Scenario Workshop methodology.</p>	WP6.1
<p>In his work in these projects he has learned about the scenario workshop methodology – scenario construction, as a tool used in the interactive methods and approaches. Lifestyle, compared with Strategist, was based on a much wider methodological framework. He has learned for e.g. that the scenario workshops can be used in a more flexible way, use elements of it in his work, which would not require much time and effort, but could be effectively used in vision-making activities for e.g. Another thing he had learned from the CIWs, when there were a lot of leaders involved (other AMs), was about the negotiation processes, trying to make the best out of the situation. He has come to an important conclusion that the appropriate way was to have one clearly-defined leader in the process (an AM in this case). He compared the group of AMs with ‘a ship with too many captains’. Thus a lot of effort was not used in a proper and productive way.</p>	LP6.2
<p>‘Learning in our work is very much a side effect of the work we are doing’, in a way. It is learning by doing. In Lifestyle the training was on the job. Given the focus of the work in Lifestyle on methods, it was very much learning through experience. It led also to knowledge build up, gathering knowledge, even, to a certain degree of codifying the knowledge. But, there were not enough possibilities to learn because the team members were engaged most of the time in organising activities and did not have enough time to reflect over the experiences. Some reflections have occurred through informal discussions with some of the team members, regarding critically the subsequent developments of the project. Most of his learning occurred through experience. The participatory approaches that they had to work with in Lifestyle, were very much ‘learning by doing’. He recognises there was a need for more reflection and discussion, but most of the time they didn’t have the time for that.</p>	LD6.3
<p>He expressed that it was difficult to pinpoint specifically what he has learned during his work in Lifestyle because he was engaged in parallel in other projects. Then it is difficult to say when, where and how learning occurred in a specific project.</p>	LP6.3
<p>He expressed that it was difficult to pinpoint specifically what he has learned during his work in Lifestyle because he was engaged in parallel in other projects. Then it is difficult to say when, where and how learning occurred in a specific project.</p> <p>In practice interviewee 6 was participating in the preparatory meetings of the CIWs and in work during the CIWs, where he was giving inputs on design, facilitation and implementation measures. He has also played the role of a linking pin between different AMs in their collaboration.</p>	LP6.4 WP6.5

He talked about his work in the preparation and the execution of the Gothenburg CIWs, which according to him has had successful results, where important steps have been taken and further steps have been defined for Lifestyle activity and where a lot of learning has occurred about the IPs and among the IPs. However another side of the work required collaborating with a group of AMs in providing support to the IPs. They had to collaborate in the CIWs as well. He concludes that involving too many AMs in the organisation of such events, where every AM wanted to contribute and play a role, and where enormous time and effort was spent to find a compromise regarding the organisation of support, was a mistake and was far from an optimal collaboration, which moreover was hindering the AMs to achieve their individual objectives. In Gothenburg he has learned that a level of flexibility in the programme of work of such events like CIWs combined with confidence in the personal competences, can be beneficial to achieving good results. He concluded that a degree of spontaneity in the development of the activities shall be allowed to the benefit of the outcomes.

WP6.6

LP6.6

Most of interviewee 6 usual work was in smaller work groups (3-4 people). In Lifestyle he had to work in much more bigger group and in a collaboration with other groups (AMs and IPs). Thus in the process of work there were always several people who were deciding upon the tasks and the methods to be used. Working in this context it meant that he had to listen continuously and take into account other people's ideas. He refers to the Commission people who often intervened in the work process, influencing the work of the AMs in a negative way. He mentioned also the AMs involvement in collaborative actions, which influenced the decisions upon the tasks and the methods to be used. Also in the Lifestyle project team there was a collaborative decision making over the tasks and the methods to be used, which made it difficult sometimes to come with clearly defined directions of work.

WP6.7

In their work they had been confronted with a framework of rules and directives coming from the Commission, which limited Lifestyle space of manoeuvre. Moreover this framework has been changing several times, creating uncertainty and difficulties in the work process. He remembers the Potsdam CIW, where the programme of work has been changed several times and in a wrong direction, as he evaluates.

WP6.8

In evaluating the results of the work, he expressed that the value of the evaluation of the work results depends on the level of expectations. If the expectations from a work activity are too high than the results will rarely match the too high expectations. In the beginning of the work in the project he has had very high expectations and very motivated. He together with a colleague from Lifestyle has put a lot of effort in organising and carrying out the Gothenburg CIW. However later it turned out that due the changes in directives of activity coming from the Commission and the internal misunderstandings in the Lifestyle project team, the results from Gothenburg CIW were not taken into account, the accomplishments of the Gothenburg CIW could not be followed up and they had to start again the work from the beginning in a new CIW.

WP6.9

According to interviewee 6, in Florence they (Lifestyle team) were much more realistic in their expectations and more focused in their activities and thus they could achieve some results that met their expectations. However, the results of the CIWs in-between Gothenburg and the Florence ones were frustrating. The context of work was changing all the time and it interfered negatively with the Lifestyle (and other AMs) work. He admits that the team has been maybe too lenient towards the Commission and that they should have insisted to work in their own way in order to achieve the objectives.

WP6.10

<p>He remembers that in Pamplona CIWs a project officer (from the Commission) was interfering strongly in the CIWs activities and programme, thus driving the process in a totally different direction than that intended by the organisers (Lifestyle and other AMs). If he could change something in the Pamplona CIW, he would have linked a seminar about the construction of a scenario workshop with a following scenario workshop activity and thus could have come out with better results. If he could, he would have chosen a more focused and logical design of the CIWs. However, the fact that the CIWs activities had to be programmed and carried out in collaboration with other AMs, this would have been hard or not possible to achieve.</p>	<p>WP6.11</p>
<p>Other things that could be done, including the to try to accomplish a real link between the methods that Lifestyle was providing and the IPs' setting that they were involved in. A training could be organised about the methods offered by the AMs and make and help them apply the methods in their own project activities. But then that would need more time. Then more focused meetings could be organised with a small group of IPs. But this was not possible under those circumstances.</p>	<p>WP6.12</p>
<p>In Potsdam CIW the history repeated itself. The programme of activities was decided from outside Lifestyle. If he could have changed something in that CIW, he would have tried to follow up the results that were already achieved in Gothenburg and build up the work starting from what they already had. A fact was that there were new IPs coming at the CIWs, with new needs and their integration in the CIW process should have been done in a proper way. His and his Lifestyle colleague's ideas were written and suggested in one report, after the Gothenburg CIW. However this report, with its results and recommendations for the next CIWs, was never considered in a proper way.</p>	<p>WP6.13</p>
<p>In the Luxembourg CIW they were urged to construct clusters of IPs. Preparation work was not properly organised. It was clear from before that clusters of IPs should be build, but they did not know how to do it. The clusters should have been build much earlier, but they could not find the best way to do it. They had to define properly the clusters. Their idea finally was to group them on the basis of their needs for competence development and interests. He admits that they should have had a proper prior preparation to the CIW in order to achieve better results. They should have surveyed the IPs about their needs of competence development and expectations from a collaboration with other IPs. Then clusters of IPs around needs and interests could have been formed. This would have given to them a better position to carry out the objectives in the Luxembourg CIW.</p>	<p>WP6.14</p>
<p>Another problem was that in between the CIWs not much interactive work with IPs happened. The follow-up work was not properly done, in order to insure a continuity of the work done in the CIWs.</p>	<p>WP6.15</p>