

A Case Study of Expansive Learning in Social Movements:
The Design and Implementation of a Media School Initiative

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ABSTRACT

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The creation and stabilization of local collective practices are important for social movement actors who wish to effect wider societal change. However, the making of durable collective practices remains problematic for people working on the ground. Using the theoretical framework of expansive learning and activity theory, this study investigates how new practices are created in social movements and identifies enablers and obstacles to creating authentic organized practices that address local needs. An educational initiative called the Media School, implemented by an LGBT+ organization in Turkey, is used as a case study. Through narrative interviews conducted with two people involved in the design and implementation of the Media School, its historical development is traced from its inception in 2007 to the present day. The findings reveal that social movement practices may start with a general vision and default methods and strategies. Knowledge of exact strategies and methods emerge in the process to achieve the vision. The enablers identified in the study include: observing ongoing change and capturing new emerging patterns; using probability-oriented strategies to complement pattern-oriented ones when definitive decisions cannot be made; accommodating existing rules and resisting their form; using organized models of interaction with target communities to give them process support when generating policies; imposing internal ethical principles. Obstacles include: narrowing original visions by focusing on only one method for their operationalization. In addition, tacit, shared understandings between people emerged as both an obstacle and enabler to the creation of new practices.

Keywords: social movement learning, expansive learning, activity theory

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DEDICATION

I dedicate this study to my parents Funda and Eyüp Bahcivan,
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Chapter One: Introduction

Background

The problem with which this study is concerned was not found by surveying the academic literature. It comes from the ground, from my own experience with people who are dear to me. These are people who are actively involved in social movements—people whom I have come to call my colleagues and friends. The ground to which I refer is the human rights movement in Turkey. The people involved may be referred to as social movement actors without prejudice to the specific words which they may choose to define themselves—activists, human rights defenders, human rights advocates, organizers, or practitioners. An actor located within the movement would be engaged in a host of activities aimed at effecting some kind of change in wider societal practice. It goes without saying that to change a more general societal practice, one needs to build a practice through which that change can be brought about. This study is concerned with the difficulties involved in the building of such local, organized, collective and stable practices to effect wider societal change.

When I speak of organized, collective and durable practice, I do not refer to the establishment of some form of legal entity with recognizable formal structures constituted under a jurisdiction. Rather, my focus is collective practice in a general sense, which may or may not be located within the boundaries of such formal structures. An illustration will serve to clarify both what I mean by practice and how its creation is so crucial yet problematic.

In 2014, one of the human rights organizations I work with launched a project to monitor racial and ethnic discrimination in Turkey. The project involved a number of components designed to contribute to the overall objective of revealing the ways in which systemic legal and administrative practices gave rise to concrete cases of discrimination on the ground. One of the project components involved the creation of a network of local journalists who would be willing to report on local cases of discrimination in their respective cities. The data generated and systematically shared through the journalists' network would serve as evidence in building arguments about how discrimination manifested in various walks of life. This would provide grounds for further research and shed light on interventions that might be necessary at a larger scale. Beyond the goal of data collection through cases, the network was envisaged as a cradle of human rights-based reporting. It would be a formation that enabled interaction between local journalists, scholars who studied discrimination and journalists who specialized in human rights monitoring and reporting. The

project was funded by a donor as an initiative within the wider context of preventing ethnic and racial discrimination in Turkey.

The initiative was launched by events aimed at educating local journalists on discrimination and human rights-based reporting. Our expectation was that the network would be gradually built and expanded around these individuals. The work done within and through the network was a *local collective practice* that we had hoped to build through our organization, but which would transcend the boundaries of any single organization.

Despite the initial enthusiasm of some 25 local journalists across the country, who voluntarily attended the educational events as a single cohort and expressed interest in the network, no one published any news reports about discrimination or engaged with others after the training, with the exception of a few instances where interaction was prompted by our organization.

The question of what is wrong with this design can be approached in a number of ways. However, my intention at this point is not to offer explanations about what went wrong with this particular initiative. The example is meant to illustrate a repeated pattern in my experience and those of my colleagues where attempts to create and maintain a collective practice have either failed or produced weak structures dependent on the efforts of a few individuals. This repeated pattern tends not to be reflected in final project evaluation reports that are submitted to donors. The tendency is to construct a story of some partial success—that educational activities were successful, that some kind of networking took place. There is almost a silent agreement between the actors to avoid going into the details of failed initiatives.

The overall phenomenon addressed by the current study is the making of stable, local collective practices in social movements. The investigation into this general phenomenon will include an inquiry into how the initial idea for a practice is generated, how the idea is translated into practice, how the practice is stabilized and how challenges are dealt with along the way.

Theoretical Framework

This study approaches the phenomenon of collective practice creation in social movements from the lens of the theory of expansive learning, which was first introduced in 1987 by Yrjö Engeström (2015). The theory of expansive learning is a process theory that

systematically addresses the problem of the formation and transformation of collective practices which are conceptualized as *activity systems* (Engeström, 2015).

An exploration of learning in the context of social movements requires a clarification of what we mean by learning. Gregory Bateson (2000) underlines that “the word ‘learning’ undoubtedly denotes *change* of some kind. To say *what kind* of change is a delicate matter” (p. 283, emphasis in original). In a meta-review of studies on workplace learning, Fenwick (2010) points out that the word learning is used to describe phenomena that are ontologically so different from one another that it is no longer useful to refer to them with the same word. She argues that one should begin any study of learning by asking exactly what is being learned and why. Along the same lines, Engeström (2001) stresses that any learning theory must first and foremost be clear about who the learners are, what they are learning, how they are learning and why they are learning it. These points will be elaborated in the literature review of this study when explaining expansive learning. However, for the purposes of this introduction, it is important to underline that the *learner* in expansive learning is not the individual person, and the *change* that takes place does not occur in the heads or skills of individual people (Engeström, 2015). Expansive learning is regarded as falling under the rubric of practice-based theories where change occurs in “the relations of individuals *with* their social others and with the activities and objects flowing through these relations” (Fenwick, 2006, p. 286, emphasis in original). The unit of analysis of learning is therefore not the individual person but the *activity system* in which transformation takes place across all the constituent elements of the system and through their dialectical relations to one another (Engeström, 2015). The elements of the system include such things as artefacts, which are the carriers of the knowledge produced by human beings (Engeström, 2015). In this conceptualization, the individual subject is regarded as an inseparable element of the system and is therefore transformed to the extent that other elements and the relations between them are transformed (Engeström, 2015). To use Fenwick’s (2010) term, the individual subject is *enmeshed* within the activity system that also comprises other social and cultural forces.

From another perspective, expansive learning is regarded as a theory representing the *knowledge-creation metaphor of learning* (Paavola et al., 2004). This points to the aspect of expansive learning which stresses that learning cannot be conceived only as the assimilation or acquisition of already existing knowledge, cultural practices or norms (Engeström, 2015). The argument behind this conception is very straightforward. Engeström (2015) highlights that if we conceive of learning only as the constant acquisition of knowledge that is already

there, we would be unable to explain collective human development. Human societies do not develop by merely acquiring knowledge, they also create new knowledge. Expansive learning is conceived as the conscious and deliberate creation and transformation of collective knowledge in the form of cultural practices at all scales (Engeström, 2015).

Since this study aims to explore expansive learning in the context of social movements, a definition of social movement is also in order. For the purposes of this study, a social movement is defined as “*a process in which a specific social group develops a collective project of skilled activities centred on a rationality – a particular way of making sense of and relating to the social world – that tries to change or maintain a dominant structure of entrenched needs and capacities, in part or whole.*” (Cox & Nilsen, 2014, p. 57, italics in original). The significance of Cox and Nilsen’s definition is that it broadens the concept of social movements by seeing them as both movements from above and movements from below. Movements from above are regarded by the authors as those in dominant positions with wider access to resources and power. Movements from below are regarded as those in subaltern positions with limited access to resources and power. Hence, for Cox and Nilsen, neoliberalism is also a social movement, albeit from above. When making this distinction between above and below, they argue that it levels the theoretical field and situates both dominant groups and subaltern groups as actors in a conflict, exercising their collective agency to either maintain, modify or altogether transform social structures to cater to their needs and capacities.

The notion of conflict is accepted as central to most definitions of social movements (Diani, 2008; Touraine, 1985). Cox and Nilsen’s (2014) approach underlines this central defining notion. The difference in their conceptualization, as they argue, is that it avoids positioning social movements from below as a specific *level* within a social, political, economic order that is taken as given. Second, they note that such a conception places the collective agency of both dominant and subaltern groups as the animating force behind structures, practices, social formations, meanings and narratives. In this manner, it avoids a lens in which the collective agency of a set of actors is portrayed as struggling against a reified, omnipotent and omnipresent structure or system that is produced on its own “at so deep a level as to be barely accessible to human action” (Cox & Nilsen, 2014, p. 180).

The primary theoretical framework guiding the current study is the expansive learning construct while the collective practice examined through the empirical case study is situated within a social movement from below.

Situating the Current Study in Social Movement Learning

Learning in social movements arises as a distinct object of scholarly inquiry primarily in the tradition of adult education that identifies collective struggles as powerful sites that prompt learning (Hall & Turray, 2006). For adult educators such as Holst (2002), educational activities or learning is dialectically integral to the very process of organizing in social movements. For Foley (1999), learning is not an isolated event but an inseparable part of life and the most powerful manifestations of learning occur in struggles in which people assume an active role to make sense of and theorize about their situation. This is why Foley (1999) focuses on informal and incidental learning and conceptualizes learning as being located within an ensemble of activities, arguing that it will take place everywhere and not just in structured educational activities.

While informal learning is significant in social movement learning, the question of what is being learned informally is crucial. For example, in his account of the learning in public protests for the protection of the Clayoquot Sound Rainforest in British Columbia, Walter (2007) does not just give an account of the knowledge and skills acquired by individual people in struggle but instead points at the production and proliferation of a new discourse of environmental protection. The people involved in the protests produce this discourse by also producing and practicing a collective mode of working in the Clayoquot Peace Camp, which becomes the focal point of the movement (Walter, 2007). The Clayoquot Peace Camp is described by Walter as the nexus of an entire practice of protest marked by consensus decision-making, the collective development of rules for operating, the organization of workshops, etc. Hence, Walter's (2007) account also points to those forms of learning as producing new modes of organizing in local circumstances.

In a special issue of *Interface: A Journal for and About Social Movements*, Motta and Esteves (2014) highlight that theorizing about learning in social movements includes challenging dominant logics and habits that have come to permeate our lives through taken-for-granted ways of building relations and practices. Motta and Esteves (2014) argue that "unlearning these relationships and practices and learning new ones" (p. 3) are a vital aspect of social movement learning. Similarly, in his study of activist research produced by social movements outside of traditional research institutions Choudry (2014) shows how these research activities produce not only knowledge as an outcome of research but also new "relations of the production of the research itself" (p. 472). In other words, a new collective

practice of conducting research is produced. The production is not limited to the final research report.

Recognizing social movements as important sites of learning, Engeström argues that investigations of learning in this domain should go beyond descriptive accounts of specific movements and adopt a rigorous theoretical approach to analyze processes of how new practices and cultures are created (ISCAR, 2018). To this end, he proposes the theoretical framework of expansive learning (ISCAR, 2018). Expansive learning theory was thus used to guide inquiries in this area in a project implemented between 2014 and 2017 by the Center for Research on Activity Development and Learning (CRADLE) at the University of Helsinki (Learning in Productive Social Movements, n.d.). In the current study, I use the theoretical framework of expansive learning to investigate the process of the formation of durable local practices in social movements. In terms of locale, this study is concerned with the types of *practice* that are developed within, around and through already existing organized structures located within social movements.

The Sample Case

To investigate the general phenomenon of collective practice creation in social movements I studied an educational initiative implemented by an organization located in the LGBT+ movement in Turkey. The organization is called Kaos Gay and Lesbian Cultural Research and Solidarity Association (shortened as Kaos GL)¹. It is one of the oldest and largest formations that has been instrumental in the development of the movement in Turkey. Kaos GL engages in a wide range of activities aimed at empowering LGBT+ people and bringing about legislative and administrative changes at the local and national levels for the protection of their rights. Kaos GL is a legally constituted association operating under Turkish law. The educational initiative is called the Media School. Its purpose is to educate and empower adult participants to produce LGBT+-related local news reports and stories, which are then published on Kaos GL's online daily news portal. The Media School operates in the form of a school-on-wheels where trainers visit different cities each year to deliver thematic workshops relevant to local news production. These include introductory workshops on fundamentals of news reporting and human rights-based journalism as well as more advanced ones on interview techniques, digital storytelling and photography. They cover a broad range of themes falling under the general domain of human rights such as

¹ Kaos GL has given consent to their name being explicitly used in this study.

discrimination, gender and hate speech. Participants of the workshops who contribute to Kaos GL's online news portal are given the honorary title of Local Correspondent and become a member of Kaos GL's Local Correspondents Network.

This sample case is a fruitful ground for exploring the phenomenon of collective practice creation for a number of reasons. First, it is a practice that has been ongoing since 2007 and therefore provides an opportunity to examine how a host of challenges were overcome in the course of its historical development. Second, it provides an opportunity to examine the kinds of challenges that could not be overcome and their reasons. Third, because of its links to people outside Kaos GL's organizational structure (local correspondents), it helps to understand the development and maintenance of a practice that is not confined to the staff of a single organization.

The fact that the sample case involves a school might be misleading in terms of the focus of this study. This study is not an inquiry into the pedagogical practices of the Media School or the learning of the individual people who attend it. The subject of pedagogy is only addressed as it relates to the development of the school as a durable collective practice. A similar inquiry could have been made about the building of any other social movement practice. For example, Kaos GL also conducts research activities. If the research activities had been chosen as the focus, this study would have investigated the building and development of the research practice and not just the outputs of research.

Similarly, the fact that this study involves a practice developed by an organization located within the LGBT+ movement does not mean that the study is about the LGBT+ movement per se. Rather, the sample case is chosen to investigate processes of organized practice that can be witnessed across a number of different organizations and collectives operating in social movements. If the focus had exclusively been on the LGBT+ movement, studies on the history and dynamics of the movement in Turkey would have been one of the central sources of literature.

Expansive Learning and Activity Theory: Towards the Research Questions

The theory of expansive learning, which is the guiding theory for this study, is derived from and grounded in the principles of cultural-historical activity theory (Engeström, 2015). Cultural-historical activity theory (activity theory) has its roots in the work of Lev Vygotsky, Alexander Luria and Aleksei Leont'ev who are the founders of the cultural-historical research tradition in psychology (Blunden, 2010). Although activity theory is

recognized as being a member of the family of socio-cultural theories of learning, it is different from this broader classification because of its emphasis on Marxist dialectics and historicity (Sannino & Engeström, 2018; Roth & Lee, 2007). Historicity is a foundational principle in activity theory, which posits that to understand something, one needs to understand its history by analyzing its movement and change over time (Sannino & Engeström, 2018). In Engeström's (2001) expansive learning theory, historicity is taken as the history of the local activity, the local practice under scrutiny. The principle of historicity was incorporated into the current research by delineating the case as the historical development of the Media School from its inception in 2007 up to the time this study was conducted.

The theory of expansive learning is regarded as an application of activity theory (Engeström & Sannino, 2010). This means that expansive learning should be understood not as a standalone theory that merely borrows the concepts of activity theory, but rather as one that applies activity theory in the context of an advanced form of learning by further operationalizing those concepts. The concepts used in activity theory are so vast that they easily take up a full introductory academic course, such as the one offered by Andy Blunden at the University of Melbourne (Blunden, 2015a). In the current study, these concepts will be presented as they relate to the expansive learning process and the research questions. In keeping with the principle of historicity, the historical development of the concepts of activity theory will also be presented to give an idea of how they originated and why they were needed. However, it is useful to point to several concepts before presenting the research question.

Both the main and supporting research question of this study have to do with the formation of new knowledge and practice. Here, I have deliberately used the word *practice* in a general, non-technical sense. I use it to denote systematic long-term activities that one would delineate as a sustained project or a project component implemented within, through and around an organization located within a social movement. In the framework of cultural-historical activity theory, the general notion of *practice* will be replaced with the specific concept of *activity system* which will be explained in the literature review. I use the word knowledge to denote the knowledge of a practice. The supporting research question has to do with the enablers and obstacles to the creation of a new practice. Again, I use the two notions *enabler* and *obstacle* in a general, non-technical sense. In the study these two notions will be retained but framed within the concept of *contradictions* which will be explained as it is

theoretically defined in expansive learning. Finally, the supporting research question about the enablers and obstacles to a practice is not concerned with those enablers and obstacles that may be presented by governments. This study is not about the ways in which governments undermine or support social movements. It is concerned with the inner dynamics of practices that fall closer within the sphere of control of social movement actors.

The Research Questions

In light of the conceptualization of social movements proposed by Cox and Nilsen (2014) and the theory of expansive learning developed by Engeström (2015), the purpose of this study is to investigate the process of how new practices are created within a social movement setting in Turkey.

By tracing the historical development of the Media School from its inception to the present day through narrative interviews and supporting news stories from Kaos GL's online news portal, this qualitative case study will seek to answer the following main and supporting questions: *How do social movement participants create new knowledge and practices? What are the enablers and obstacles to the creation of new practices?*

This study addresses a problem observed across a multitude of organizations located within social movements in Turkey. People who individually spend enormous amounts of time and effort to bring about social change often face frustrations when individual efforts cannot be organized in the form of collective productive practices requiring the contributions of multiple actors. This problem tends to be overlooked. Although the case used in this study involves a local organization in Turkey, the creation and stabilization of local collective practices are so important that they are the focal point of an entire process theory of learning developed by Engeström (2015). It is my hope that an examination of the process of creating a new practice within a social movement setting in Turkey through the lens of the theory of expansive learning will contribute to better identifying and articulating problems faced by social movements from below when building new practices. More importantly, this study will be meaningful if it is able to identify the ways in which these problems can be overcome.

Chapter Two: Literature Review

The main phenomenon inquired in this study is the development of stable collective practices. The theory of expansive learning operationalizes the notion of collective practice through the concepts of activity theory. In this chapter I will begin with a brief overview of expansive learning. I will then draw on both early and recent studies to present the fundamental concepts used in activity theory, such as artefact mediation, actions, operations, activity, subject, object-orientedness, instruments and contradictions. At the end, I will return to the theory of expansive learning and explain how the concepts of activity theory are incorporated therein.

Expansive Learning: Overview

The theory of expansive learning was first introduced by Yrjö Engeström in 1987 as a process theory of learning that focuses on how collective subjects transform and create new cultures and practices (Engeström, 2015). Another way to express this is that the object of study in expansive learning is the process of the development and transformation of collective practices. Because of its distinct focus, expansive learning has been described as a theory representing the *knowledge-creation metaphor of learning* (Paavola et al., 2004). This metaphor was proposed by Paavola et al. (2004) as a third metaphor encompassing both the *acquisition* and *participation* metaphors which were previously suggested by Sfard (1998) to classify learning theories. Engeström and Sannino (2010) acknowledge the need for this shift in perspective and argue that

the theory of expansive learning must rely on its own metaphor: expansion. The core idea is qualitatively different from both acquisition and participation. In expansive learning, learners *learn something that is not yet there* [emphasis added]. In other words, the learners construct a new object and concept for their collective activity, and implement this new object and concept in practice. (p. 2)

This notion of *learning what is not yet there* is at the heart of the questions that drive the development of the theory of expansive learning (Engeström & Sannino, 2010). The phrase is so important that it becomes the hallmark of the theory of expansive learning and is incorporated into the title of a book by Engeström (2016a), which features empirical studies that apply the theory. Engeström (2001) writes:

People and organizations are all the time learning something that is not stable, not even defined or understood ahead of time. In important transformations of our

personal lives and organizational practices, we must learn new forms of activity which are not yet there. They are literally learned as they are being created. There is no competent teacher. Standard learning theories have little to offer if one wants to understand these processes. (pp. 137, 138)

Hence, expansive learning theory moves beyond how knowledge is socially reproduced, shared or internalized and focuses on how whatever knowledge or practice is out there gets there in the first place (Engeström, 2015).

The theory of expansive learning is derived from cultural historical activity theory (Engeström, 2015). Cultural-historical activity theory (also known as activity theory and abbreviated as CHAT) has its roots in the work of Lev Vygotsky, Alexander Luria and Aleksei Leont'ev who are the founders of the cultural-historical research tradition in psychology (Blunden, 2010). The theory of expansive learning is regarded as an application of activity theory (Engeström & Sannino, 2010). This means that expansive learning should be understood not as a standalone theory that merely borrows the concepts of activity theory, but rather as one that applies activity theory in the context of an advanced form of learning by further operationalizing those concepts.

In light of the above, a presentation of the theory of expansive learning can be structured in several ways. One logical structure would be to first explain the core concepts and principles of activity theory and then move on to discuss how these are applied in expansive learning. This progression is a logical choice because it directs the reader from the source to the applications and it is used in explications of the theory (e.g. Engeström, 2001, 2015; Engeström & Sannino, 2010). However, I find that this approach makes a difficult read in a lengthy presentation such as the present one. Activity theory is laden with numerous interconnected concepts that make full sense only when presented in detail giving the contexts in which they have arisen and their relationship to one another. Introducing expansive learning after relevant concepts of activity theory have been fully addressed places a distance between the theory and its application. Here, I will adopt a slightly different approach. I will begin by discussing the contexts in which expansive learning is used. In this brief exposition, I will try to avoid lengthy theoretical explanations. In cases where a theoretical discussion is necessary, I will only explain those concepts which are more easily elucidated on their own terms. I will then move on to activity theory and refer to elements of expansive learning at significant points to discuss the implications of the concepts in practical applications.

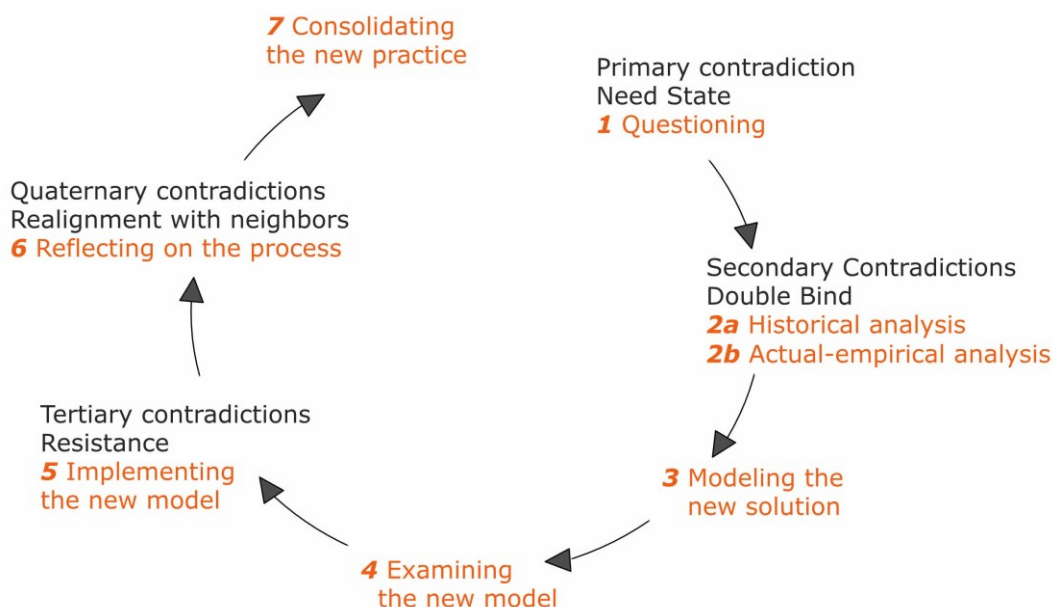
The Expansive Learning Cycle and Its Applications

The theory of expansive learning is a process or phase theory of learning (Engeström & Sannino, 2012). A process theory is one that claims to either describe or explain the process of how a certain phenomenon occurs through distinct steps or phases which must have intelligible links between them (Engeström & Sannino, 2012). In other words, a process theory does not just establish a list of some conditions that need to be fulfilled for some phenomenon to occur. Instead it offers or claims to offer an explanation as to why those conditions or phases should logically follow one another. Examples of process theories in organizational learning are Weick's (1995) theory of how people make sense of events and phenomena in organizations and Nonaka and Takeuchi's (1995) theory of knowledge creation in organizations.

In his book *Learning by Expanding*, which was first published in 1987, Engeström (2015) graphically represents the phases of expansive learning in what he calls the *cycle of expansive learning*. Figure 1 is a representation of the cycle as is depicted in a later work by Engeström (2001).

Figure 1

The Expansive Learning Cycle



Note. The model of the expansive learning cycle with its distinct phases and levels of contradictions, as described by Engeström (2001, p. 152).

Static graphic representations are good for capturing essential elements. However they do little justice in showing what is behind the theory or what one does with it. In essence, the cycle depicts the stages of the process of how individual and collective transformation takes place (Engeström, 2015). It is the cycle which leads to the making of a new practice or a culture—the cycle that leads to learning what is not yet there (Engeström & Sannino, 2010). It should be noted at the outset that expansive learning is based on dialectics and therefore does not claim that something new is produced from scratch. On the contrary, any new thing is always born from the dialectical relations of what was already there (Engeström, 2015).

The expansive learning cycle is used in several ways. Firstly, it is used in the context of what is called a Change Laboratory. The Change Laboratory is a formative intervention method in which researcher-interventionists organize a series of working sessions to assist people in various organizational settings to collectively change the way they work or to develop new practices to address the real problems they face in their activities (Virkkunen & Newnham, 2013). The Change Laboratory was developed by Engeström and is primarily used in research by The Center for Research on Activity, Development and Learning (CRADLE) at the University of Helsinki in Finland (Center for Research on Activity, Development and Learning, 2017). CRADLE represents what is known as the *Helsinki school of activity theory*, where activity theory is used in conjunction with the theory of expansive learning in the context of these Change Laboratories (Engeström & Sannino, 2010; Sannino & Engeström, 2018). Much of the empirical literature that I refer to in the current study represents the Helsinki school of activity theory.

In the context of a Change Laboratory, the researcher-interventionist would facilitate sessions in organizations prompting participants through each of the phases depicted in Figure 1 (Virkkunen & Newnham, 2013). This literally means that a session would be devoted to, for example, collectively questioning the existing practice, followed by a session devoted to the historical and actual empirical analysis of the current practice, etc. The sessions would be structured according to a plan aiming to walk participants through these phases until they have created a new model to transform their existing practice (Virkkunen & Newnham, 2013). Change Laboratories are conducted in various organizational settings such as libraries (Engeström et al., 2012), hospitals (Engeström, 2018) and schools (Virkkunen et al., 2012). Before moving on to the other ways in which the expansive cycle is used, it would

be useful at this point to briefly visit what is meant by an intervention and a formative intervention.

What Is an Intervention?

Virkkunen and Newnham (2013) offer an extension of a definition of an intervention made in an earlier work:

Intervention has been defined as “purposeful action by a human agent to create change” (Midgley, 2000, p. 113). Speaking about intervention in continuously changing human activities, a more appropriate definition might be “purposeful action by a human agent to support the redirection of ongoing change.” (p. 3)

However, the authors also draw attention to the fact that when we refer to an intervention of some kind or another in a specific practice, we are using it to mean the application of a certain method within the framework of a plan to impact the direction of change (Virkkunen & Newnham, 2013). Since purposeful action aspiring to effect change is observable even in the absence of an outside interventionist, Sannino et al. (2016) point to the distinction of an *intravention* and an *intervention*. In this distinction, an *intravention* would be initiated and conducted by practitioners themselves whereas an *intervention* would involve an actor from outside the group of practitioners (Sannino et al., 2016).

What Is a Formative Intervention?

A formative intervention is one in which interventionists and practitioners collaborate to explore solutions to real problems faced in organizational activities (Sannino et al., 2016). The concept of a formative intervention is captured well in two key phrases: collective analysis and collective design (Sannino et al., 2016). This means that the problematic situation is first collectively analyzed. However, a root problem does not immediately reveal itself for analysis. Instead, it is experienced as disturbances, tensions and disagreements, which may manifest in the speech and actions of people involved in the practice (Engeström & Sannino, 2011). These manifestations do not come neatly packaged in a way that makes the root problem evident. This is why a significant part of the process of a formative intervention involves clearly articulating a shared understanding of the problem, which requires a systematic collective analysis of the visible disturbances (Sannino et al., 2016).

The importance of first articulating a root problem is also addressed by Schön (1983) who distinguishes between the acts of *problem solving* and *problem setting*. In traditional schooling, problems are well-defined and given to students with a focus on developing their

problem solving skills (Engeström, 2015). Moreover, the solutions of the problems presented to students in traditional schooling are usually known in advance. Along the same lines, Schön (1983) argues that traditional models in work practices involve applying well-established techniques to familiar and recurring problems. He argues that problem solving can be possible only after the problem is set:

When we set the problem, we select what we will treat as the “things” of the situation, we set the boundaries of our attention to it, and we impose upon it a coherence which allows us to say what is wrong and in what directions the situation needs to be changed. Problem setting is a process in which, interactively, we name the things to which we will attend and frame the context in which we will attend to them. (Schön, 1983, p. 40)

Much of the work in a Change Laboratory formative intervention revolves around the exercise of collective problem setting after a collective analysis (Virkkunen & Newnham, 2013). The collective design of work comes later. Hence the concept of a formative intervention includes the understanding that the practitioners define problems and develop their own solutions as opposed to an external correctional intervention that aims to achieve a predetermined result (Virkkunen & Newnham, 2013). In an interview conducted in 2012, Engeström notes that careful attention is paid so that the Change Laboratory interventions are synchronized with “a major transformation effort that will take place in any case” (Engeström & Glăveanu, 2012, p. 517). It is also critical to underline that when Engeström (2015) presents expansive learning as a theoretical framework with a different conception of learning, he does so with the understanding that complex problems that occur in organized work cannot be detected by a single person; they need to be approached collectively.

The collective analysis and collective design actions in a Change Laboratory are preceded by a data collection phase conducted by the researchers (Virkkunen & Newnham, 2013). This is an exercise in which researchers visit the organization in which they were invited to conduct a Change Laboratory and collect data through onsite interviews (such as with students and teachers in schools or doctors in hospitals), observations (such as interactions between doctors and patients) and other data collection procedures. The data are compiled and presented to practitioners during the Change Laboratory sessions. (Virkkunen & Newnham, 2013). From this point onwards, the formative intervention proceeds as “the formation of *critical design agency* among all the parties: researchers, teachers, and students or respectively, researchers, managers, workers, and clients.” (Engeström 2007b, p.370,

emphasis in original). The method of the Change Laboratory is built on Vygotsky's (1978) method of double stimulation where the problem situation is presented in the form of data as a first stimulus and conceptual tools are provided to participants as a second stimulus to analyze the data (Engeström, 2007b).

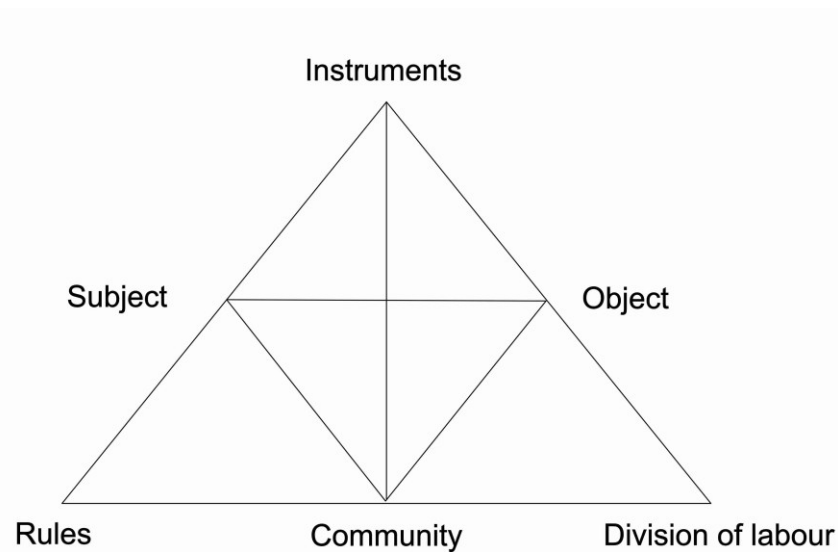
Outside of formative interventions, the expansive learning cycle is used to retrospectively reconstruct the developmental phases that a certain activity has undergone. These are studies that trace the historical developmental trajectories of specific lines of practice. For example Engeström et al. (2007) retrospectively reconstruct the changes and the development of healthcare organizations in Finland using the expansive learning cycle. Similarly, Puonti (2004) uses the cycle to trace the historical developmental trajectory of economic crime investigation in Finland. This second type of retrospective reconstruction is sometimes accompanied by a parallel intervention. For example, Mäkitalo (2005) maps the historical development of elderly care in Finland as well the specific developmental phases of an institution providing elderly care services. However, Mäkitalo's (2005) study is not a standalone analysis. His analysis feeds into an intervention conducted parallel to the historical analysis. In other words, the findings of the retrospective analysis are used to guide the intervention taking place at the same time (Mäkitalo, 2005).

Finally, the expansive learning cycle is also presented to participants in its graphic form during Change Laboratory sessions (Virkkunen & Newnham, 2013). In this case, we see that it performs a dual function. On the one hand, as noted above, participants are walked through the phases of the cycle within the intervention. On the other hand, the cycle is explained and presented to participants graphically so that they may use it as a tool to collectively and retrospectively reconstruct the historical developmental phases that their activity has undergone for the purpose of analysis (Virkkunen & Newnham, 2013). When the cycle is presented to participants in such fashion as an analytical tool, it serves as the second stimulus I referred to above by reference to Engeström (2007b).

Change Laboratories are not problem solving sprints. They take place over an extended period of time ranging from several months to a year, during which new solutions are modeled and sometimes implemented as part of the formative intervention (Virkkunen & Newnham, 2013). The transformation that comes about as a result of expansive learning takes place, not in individual people, but rather in the collective activity whose skeletal structure is modeled by Engeström (2015) as shown in Figure 2.

Figure 2

Engeström's Model of the Human Activity System



Note. The structure of the human activity system with its indivisible elements as a unit of analysis, as modeled by Engeström (2015, p. 203).

Engeström (2015) derives the structure of the human activity system shown in Figure 2 by building on the earlier works of Vygotsky (1978) and Leont'ev (1978, 1981)². In the next section, I will move away from expansive learning to focus on the historical roots of activity theory, which constitutes the foundations of Engeström's (2015) work.

Cultural-Historical Activity Theory

Cultural-historical activity theory has its roots in the work of Lev Vygotsky, Alexander Luria and Aleksei Leont'ev who are regarded as the founders of the cultural-historical research tradition in psychology (Blunden, 2010). The work of these three figures, known as the troika of Russian psychology, is, in turn, strongly informed by the philosophical

² *Leont'ev* and *Leontyev* are two different English transliterations of the Russian name of the same author. Two works by the same author are cited throughout this study: Leont'ev (1978) and Leontyev (1981). In cases where I cite both works, I only use the first transliteration to facilitate reading, i.e. Leont'ev (1978, 1981). In cases where I cite only one of the works, I cite as either Leont'ev (1978) or Leontyev (1981).

tradition of the German philosopher Hegel and the works of Marx and Engels (Blunden, 2010).

The complex root model of an activity system shown in Figure 2 was developed by Engeström (2015) as the foundational structure for the theory of expansive learning. The root model is built on the works of Vygotsky and his colleagues and is strongly grounded in Marxist dialectics (Engeström, 2015).

Activity as the Core Concept of Study

The core concept of activity as the point of departure in this tradition is based on Marx's notion of labour as the source of change and transformation (Engeström & Miettinen, 1999). Marx conceives of human beings as products of their own collective labour, in that through the use of tools which they create, human beings not only change their environment but also their own nature and their consciousness (Blunden, 2010). In his elaboration of Marxist dialectics, Ilyenkov (1982) gives a vivid illustration of the extent of self-creation of humanity through its own social labour activity:

Nature as such creates absolutely nothing "human". Man with all his specifically human features is from beginning to end the result and product of his own labour. Even walking straight, which appears at first sight man's natural, anatomically innate trait, is in actual fact a result of educating the child within an established society: a child isolated from society à la Mowgli (and such cases are numerous) prefers to run on all fours, and it takes a lot of effort to break him of the habit.

In other words, only those features, properties, and peculiarities of the individual that are ultimately products of social labour, are specifically human. Of course, it is mother nature that provides the anatomic and physiological prerequisites. However, the specifically human form which they ultimately assume is the product of labour, and it can only be comprehended or deduced from labour. (Ilyenkov, 1982, p. 71)

For Engeström (2015) labour is "the mother form of all human activity [and] is cooperative from the very beginning" (pp. 53, 54). For Marx, "labour is, first of all, a process between the human being and nature, a process by which human beings through their own actions mediate, regulate and control the metabolism between themselves and nature" (Marx, 1990, as cited in Cox & Nilsen, 2014, p. 28). It should be clear from Ilyenkov's (1982) example above that the words *labour* or *work* do not just refer to economic activity or what

people do in the labour market. Blunden (2015b) underlines that this is labour in the broadest sense of the word. Unless otherwise indicated, this is the broad sense of the words *labour* and *work* that I will be using throughout this study.

Since it is acknowledged that the roots of activity theory are informed by the works of Marx (Blunden, 2010), one is tempted to search for definitions of concepts such as action or activity in these origins. However, Wilde (1991) points out that Marx deliberately refrained from offering watertight philosophical categories on grounds that they were not useful for his own purposes. With regard to concepts such as activity, action, practice and praxis, it is pointed out that they were used interchangeably by Marx and acquired new distinct meanings as they were developed by later thinkers (Blunden, 2010; Raekstad, 2018). The current study will present the specific structure of a *mediated act* as developed by Vygotsky (1978), the later distinction between *action and activity* by Leont'ev (1978, 1981) and the development of the structure of a *human activity system* by Engeström (2015). However, going back to the origins, Blunden (2010) highlights that while Marx did not offer a precise definition of the concept of activity (*Tätigkeit*), he did set it out as the *substance* of all being:

The *ultimate substance* of the world for the purposes of a humanistic emancipatory social science and political practice is *activity*. Activity is the purposive actions of human beings, understood as social beings, all of whose sentiments and ideas are social constructs. Human beings are not just “like” other human beings; they are essentially *part of the ensemble* of social relations which are mobilized in activity, part of a larger social and historical process. (p. 98, emphasis in original)

In this context, *substance* is “the ultimate reality which underlies the domain of phenomena which the researcher seeks to understand” (Blunden, 2010, p. 180). For Marx, the *substance* of social science was not any abstract concept but rather “*real individuals*, their *activity* and the *material conditions* under which they live, both those which they find already existing and those produced by their activity” (Marx, 1975, as cited in Blunden, 2010, p. 99, emphasis in Blunden).

In the Marxist tradition, practical sensuous activity is accepted as the source of consciousness (Blunden, 2010; Raekstad, 2018). In other words, consciousness is not an entity that emerges as a product of the brain after the human brain has reached a certain level of development (Leont'ev, 1978). Rather, both its phylogenesis in the human species and its ontogenesis in individual people are rooted in social activity: consciousness is not a *product*

of the brain but a *process* rooted in social activity (Leont'ev, 1978). This conception of consciousness is a central idea in activity theory:

Common to the founders of activity theory is the insight that human mind is not located within the brain, not even bounded by the skin of the individual. The mind is in actions and activities in which humans engage with the world, by means of cultural artifacts such as signs and tools. (Sannino & Engeström, 2018, p. 44)

Neither is consciousness an unchanging entity (Leontyev, 1981). Having its origins in the external world, human consciousness is not eternal or universal but changes and develops dependent on the changes and development of the social relations and conditions of the external world (Leontyev, 1981).

In activity theory, the dichotomy between a fixed and separate mind sitting in the head of an individual versus a society that exists outside of it is broken by the concept of mediation (Engeström, 1999a). The concept is key to understanding the development and current applications of activity theory. In the next section I present an overview of the concept of mediation while introducing the structure of the *mediated act* as developed by Vygotsky (1978).

The Roots and Significance of Mediation in Activity Theory

The version of activity theory developed by Engeström (2015) which forms the basis of the theory of expansive learning builds on the earlier work of the cultural historical school. In Engeström's (2015) model of activity, mediation is one of the key concepts that holds the activity system together. Engeström (1999a) expresses criticism against applications of activity theory that overlook the role played by mediation and argues that "it is this idea that runs as the unifying and connecting lifeline throughout the works of Vygotsky, Leont'ev, Luria, and other important representatives of the Soviet cultural-historical school" (p. 28, 29). In this section, I present an overview of Vygotsky's (1978) ideas for the purposes of explaining mediation.

For the sake of historical accuracy, it is worth mentioning that Blunden (2010) presents a detailed analysis of the philosophical roots and development of activity theory in which he underlines that the idea that all relations are *mediated* was first systematically addressed by the nineteenth-century German philosopher Hegel. Blunden (2010) notes that, Vygotsky, who learned his Hegel through a close reading of Marx, gave practical expression to the idea of mediation in his experimental studies.

Vygotsky (1978) introduces the concept of mediation in reaction to the model of human behaviour propagated by the behaviourist school of psychology, which was the main paradigm at the time. Despite many variations of this school of thought, the main model of human behaviour was the S — R pattern where human behaviour was depicted as responses (R) to various stimuli (S) (Blunden, 2010). As soon as Vygotsky enters the academic scene of psychology of the early 1920s in Soviet Russia, he voices what he sees as the fundamental problem in the behaviourist school: the studious avoidance of consciousness in all inquiries related to the psychological functions of human beings (Blunden, 2010). The dominant approach to consciousness in the behaviourist scientific community of the time was that there was either no need to study consciousness or that it could not be studied scientifically even if it was needed (Blunden, 2010). Vygotsky argues that consciousness is a legitimate field of scientific inquiry and can be studied with the correct methods (Blunden, 2010). This means that human behaviour first needs to be freed from the S — R model which depicts behaviour as a series of passive responses to stimuli (Blunden, 2010). The model makes no room for consciousness and Blunden (2010) argues that by extension it “necessarily implies the denial of *agency* ... and therefore the capacity for self-determination” (p. 129, emphasis in original).

Vygotsky (1978) sees the dyadic S — R model as representing the zoological models of human behaviour and argues that the model is the result of experimental studies focused primarily on *elementary forms of human behaviour*, such as biological processes or reflexes, which are analogous to those behaviours found in animals. He points out that this results in a tendency to equate animal and human behaviour or to draw conclusions about human responses based on experiments run on animals. While he acknowledges the significance of such studies for establishing the biological basis of behaviour, he is critical of the results being extrapolated to *higher psychological functions*. So, from the very beginning, he is interested in shifting the focus of scientific inquiry in psychology to investigate “uniquely human aspects of behaviour ... the way these traits have been formed in the course of human history and the way they develop over an individual’s lifetime” (Vygotsky, 1978, p. 19). And again, from the very beginning, he works with the assumption that higher psychological functions found in humans are never direct responses to stimuli but are instead mediated by culture, which effectively allows the subject to control their own behaviour (Vygotsky, 1978).

Vygotsky’s (1978) experiments that demonstrate such conscious control over behaviour and hence make room for human agency aim to understand “the practical activity

of children at the age when they are just beginning to speak” (p. 23). Here, the fundamental assumption is that speech, as a uniquely human characteristic, plays an organizing role in activities such as using tools to solve practical tasks. In other words, Vygotsky’s assumption at the outset is that speech plays a *mediating* role in shaping the subject’s response to her environment. His experiments are designed to allow for the simultaneous study of both speech (sign) and tool use in children who are asked to solve practical problems. Again, he opposes the study of these two processes as isolated phenomenon because he notes that they occur together in the child’s everyday practical activity. The experimenter is present and interacts with the child as she attempts to solve such practical tasks (Vygotsky, 1978).

Blunden (2010) notes the significance of Vygotsky’s experiments in that they create a microcosm in which all the elements that a child would normally encounter in the course of practical activity, such as speaking to an adult and using objects to work on tasks, are incorporated into the experimental setting. For example, Vygotsky (1978) describes a study conducted by his colleague Levina where small children are asked to get a candy from a shelf and additional objects (a stick and stools) are placed in the experimental setting. He writes:

Children not only *act* in attempting to achieve a goal but also *speak*. As a rule this speech arises spontaneously and continues almost without interruption throughout the experiment. It increases and is more persistent every time the situation becomes more complicated and the goal more difficult to attain. Attempts to block it ... are either futile or lead the child to “freeze up”. (Vygotsky, 1978, p. 25, emphasis in original)

Based on findings from these experiments, Vygotsky (1978) shows that speech plays a significant role in the way the child approaches the task. He notes that, at the start, the child uses speech to describe and analyze the practical problem whereas later, speech serves a planning function: the child speaks in order to plan how to *use the tool* to solve the problem. Moreover, he notes that speech starts as an external communicative process and is later turned inward. In other words, early communicative speech first transitions into speech that the child directs to herself, whereas later it turns into *internal speech* (Vygotsky, 1978). In this manner, he points out the crucial aspect of speech which has to do with the child’s self-regulation. He stresses the significance of self-regulation through speech as follows:

It is decisively important that speech not only facilitates the child’s effective manipulation of objects but also control’s *the child’s own behavior*. Thus with the

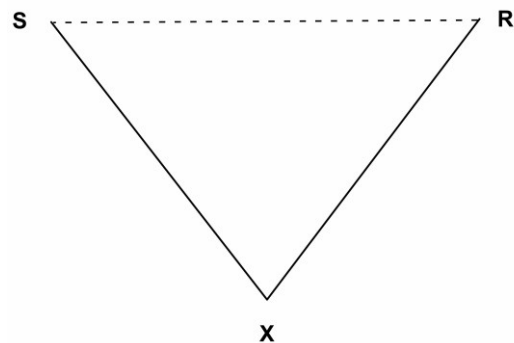
help of speech children, unlike apes, acquire the capacity to be both the subjects and objects of their own behavior. (Vygotsky, 1978, p. 26, emphasis in original)

After establishing the organizing role that speech plays in the development of practical intelligence, Vygotsky and his colleagues conduct experiments to investigate “other forms of sign-using activity in children in all its concrete manifestations (drawing pictures, writing, reading, using number systems, and so on)” (Vygotsky, 1978, p. 38).

These experiments move forward with the understanding that psychological functions distinguishing humans from animals are *not* direct responses to stimuli and therefore *cannot* be described using the Stimulus — Response model of behaviour (Vygotsky, 1978). Vygotsky (1978) argues that even if one could represent elementary forms of human behaviour with this dyadic model (such as to describe reflexes or other biological functions), the use of signs, such as speech, qualitatively alters the subject’s behaviour. When a subject is responding to a stimulus (such as a practical task), he stresses that the use of sign systems serves as a *second order stimulus* which is actively used by the subject to shape her response. Hence, he makes the important finding that “this sign also possesses the important characteristic of reverse action (that is, it operates on the individual, not the environment)” (Vygotsky, 1978, p. 39). From this, he experimentally establishes that higher psychological functions found in humans are always mediated by tools and signs, which are socially rooted and have acquired meaning over the course of the cultural and historical development of society. In place of the Stimulus — Response model, Vygotsky (1978) introduces the triadic model of human behaviour shown in Figure 3, where X represents mediating tools and signs standing between the stimulus and response.

Figure 3

Vygotsky's Representation of a Mediated Act



Note. Vygotsky replaces the dyadic model of human behavior with the triadic representation of a mediated act (1978, p. 40).

Vygotsky's (1978) triadic model of human behaviour captures the theoretical principle of mediation in human activity. The same theoretical principle is captured in his experimental method of double stimulation where children are given a task (first stimulus) and then either offered a tool (second stimulus) to solve the task or observed to see whether and how they develop their own tools (Vygotsky, 1978). The principle of double stimulation is used in the Change Laboratory method I described earlier where, this time, researchers present data to an adult audience as the task/problem situation (first stimulus) and then present the conceptual tools they may use (second stimulus) to analyse the problem situation (Engeström, 2007b). The model of the human activity system in Figure 2 and the model of the expansive learning cycle in Figure 1 are among such second stimuli presented to Change Laboratory participants (Virkkunen & Newnham, 2013).

Going back to Vygotsky's (1978) distinction between tools and signs, he stresses that the development of the child's use of tools and signs are intertwined, however he devotes considerable space to discuss the distinct functions served by each. He writes:

The tool's function is to serve as the conductor of human influence on the object of activity; it is *externally* oriented; it must lead to changes in objects. It is a means by which human external activity is aimed at mastering, and triumphing over, nature. The sign, on the other hand, changes nothing in the object of a psychological operation. It is a means of internal activity aimed at mastering oneself; the sign is *internally* oriented. These activities are so different from each other that the nature of

the means they use cannot be the same in both cases. (Vygotsky, 1978, p. 55, emphasis in original)

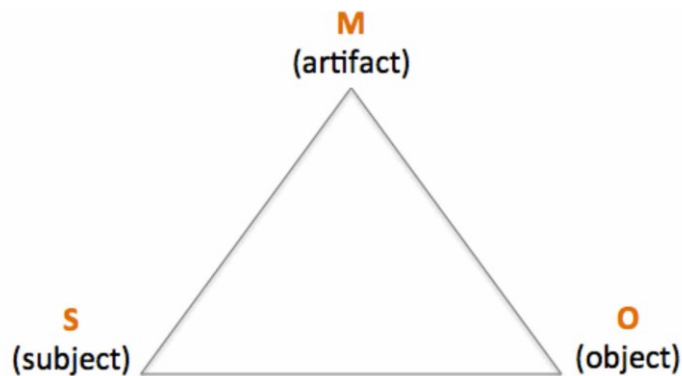
Commenting on this distinction, Blunden (2015b) warns against creating rigid dichotomous categories when interpreting Vygotsky's separation of the two. Blunden (2015b) points out that we need to look at what *function* the mediating element (X) is serving: working on the mind or working externally or maybe doing both. Beyond that, he stresses that it is futile to blindly label things as either a tool or a sign without looking at how they are operating in a relationship between the subject and its object. For instance he notes that a map functions as a sign to the extent that it works on the human mind to help navigate the terrain. As a sign, its significance is that it changes nothing in the external world directly but changes the working of the mind so that the subject may operate in the world (Blunden, 2015b).

Hence, the model of the human activity system and the model of the expansive learning cycle which are presented to Change Laboratory participants are among the conceptual tools that subjects use to work on their minds, and then through these, they work on real world tasks and problems standing before them (Virkkunen & Newnham, 2013).

In Engeström (2015), as well as in other scholars of activity theory (e.g. Blunden, 2010; Cole, 1996), we see that the distinction of functions between tools and signs is acknowledged while they are represented as an integral part of a broader category called *mediating artefacts* or *instruments*. This is in line with Vygotsky's (1978) note that "a host of other mediated activities might be named: cognitive activity is not limited to the use of tools or signs" (p. 55). Elsewhere, Vygotsky (1979) uses the term *instrument* and *tool* to describe the function served by these other mediational devices that work on the mind. He makes the point that *psychological tools* (or instruments) function to work on the mind in a way similar to *technical tools* (or instruments) that a subject uses to work on external phenomenon (Vygotsky, 1979). Vygotsky's (1978) triangular model of the mediated act is commonly represented as shown in Figure 4 (Cole, 1996; Engeström, 2001).

Figure 4

Common Representation of the Mediational Triangle



Note. The common representation of the mediational triangle as described by Cole (1996, p. 119) and Engeström (2001, p. 134).

Why is the insertion of a mediating artefact into the model of human behaviour so significant? I have already noted above that the triadic model with the mediating artefact introduces agency into human behaviour (Blunden, 2010). But the model also has historical significance.

Cole (1996) explains that there were two main paradigms that influenced scholarly disputes when psychology first emerged as a discipline of its own. The first, he traces back to Plato, who held that the human mind operates through universal unchanging rules and principles. Cole (1996) points out that the second paradigm has its roots in the work of Herodotus who believed that people's thinking is determined by how their everyday lives are organized. He then notes that in an effort to reconcile the two paradigms, Wundt proposed two psychologies which warranted different methodologies for research (Cole, 1996). Hence, Wundt made the separation of a *first psychology* and *second psychology* to mark the distinction between *elementary physiological processes* such as reflexes which could be viewed as operating based on universal rules, and *higher psychological functions* which could not be studied using the methods of the first psychology (Cole, 1996). This second psychology required the incorporation of culture into the study of the human mind because "higher psychological functions extend beyond individual human consciousness" (Cole, 1996, p. 28). Cole notes that Vygotsky and his colleagues were working to build a single psychology in which culture was treated as an indivisible element of human behaviour. Cole

underlines that by placing the X between the stimulus and response, Vygotsky placed culture as a mediating component in all human behaviour. In other words, artefacts became a way of operationalizing what culture means in activity theoretical terms. Cole (1996) writes:

Culture, according to this perspective, can be understood as the entire pool of artifacts accumulated by the social group in the course of its historical experience. In the aggregate, the accumulated artifacts of a group—culture—is then seen as the species-specific *medium* of human development. It is “history in the present”. (p. 110)

Hence, for Cole (1996) artefacts *are* culture. According to Blunden (2015b), artefacts are things produced by collective human labour which are then used in human labour in the broadest sense, and they range from the most evident such as the hammer to the spoken and written word which are made and given meaning through collective historical human labour and then used again in human labour to either work on nature or to work on the mind. Here, being *produced by human labour* does not necessarily imply a physical process of production. For example, Blunden (2015b) also notes that the constellation of stars are a mediating artefact to the extent that they are used in human labour, such as navigation, not because they are *made* by humans, but because they are elements of nature which are *given meaning* in the process of human labour.

Wartofsky (1979) proposes a significant categorization of artefacts, which I include here because it will become vital for Engeström (2015) when developing the theory of expansive learning. Wartofsky (1979) sees artefacts from the perspective of the concept of *historical human praxis*:

[Historical human praxis] ... is, in the first place, the fundamental activity of producing and reproducing the conditions of species existence, or survival. What is distinctively *human* about this activity ... is that human beings do this by means of the creation of artifacts. ... But, in more generic terms, the “tool” may be *any* artifact created for the purpose of successful production and reproduction of the means of existence. Therefore, the use of language for communication in this enterprise makes language itself such an artifact, or “tool”; so too is the mode of social organization, or of division of labor which is instrumental in the successful satisfaction of existence needs, or of the needs to reproduce the existence of the species. Extending the notion of “artefact” as tool still further, the acquisition of skills, in the process of production

... creates such skills as themselves “artifacts”, even where these skills do not entail the use of tools in the ordinary sense. (pp. 200, 201, emphasis in original)

Wartofsky (1979) then proposes a three-level classification scheme for artefacts. First, there are primary artefacts, which are created by human labour and directly used in production such as “axes, clubs, needles, bowls etc.” (Wartofsky, 1979, p. 201). Then comes secondary artefacts, which he calls *representations* – artefacts that represent an action or a practice and that are “created for the purpose of preserving and transmitting skills, in the production and use of ‘primary’ artifacts (e.g. tools, modes of social organization, bodily skills and technical skills in the use of tools)” (Wartofsky, 1979, p. 201). He takes these representations very broadly and notes that they can be transmitted using a broad array of sign systems. Thus, for example, Cole’s (1996) emphasis on the importance of cultural models of action such as *scripts* in determining behaviour falls in this category. “A script is an event schema that specifies the people who appropriately participate in an event, the social roles they play, the objects they use, and the sequence of actions and causal relations that applies” (Cole, 1996, p. 126). Hence, a *script* of what one must do when one goes to a restaurant is a socially created artefact (Cole, 1996). It is the kind of artefact, which, according to Wartofsky (1979), serves the function of representation in that it “is capable of preserving and transmitting a mode of action” (p. 202). And finally, Wartofsky (1979) proposes the level of tertiary artefacts, which do not *yet* represent a mode of action currently embodied in societal practice but nevertheless are candidates for becoming future practice. He notes that these are the products of free activity and imagination that are derived from existing human practice, but they transcend the rules or the constraints imposed by what is already there – they are representations of a possible world (Wartofsky, 1979). Engeström (2015) calls these *visions or world outlooks*.

Vygotsky (1978) primarily focuses on the function speech plays in human behaviour. Subsequent activity theorists enrich the theory by expanding on the notion of mediation through artefacts (Cole, 1996; Engeström, 2007a). For example, when analyzing the activity of a subject, artefacts such as ideologies, cultural models of action or practice, scripts, visions, stories, images, classification schemes, written work procedures, tables and charts etc., all appear as significant mediating cultural components that are socially created and integral to the model of human behaviour (Cole, 1996; Engeström, 2007a). In expansive learning, the focus is on the types of mediating artefacts or instruments that appear in the form of *models, methods* and *methodologies* produced by collective subjects (Engeström,

2015). In the analysis section of this study, I will be examining models of work (such as communication models) and methods of operationalizing visions that have emerged as significant in the context of Kaos GL's Media School.

It is highly important that Vygotsky's (1978) triadic model is regarded as both an explanation of human behaviour and *a single indivisible unit of analysis* for behaviour, which includes the subject, the object and the mediating cultural component (Blunden, 2010; Cole, 1996; Engeström, 2015). Vygotsky (1978) calls this model the *mediated act* or *instrumental act*. When these three components are brought together in a single unit Engeström (2001) highlights that "the individual could no longer be understood without his or her cultural means; and the society could no longer be understood without the agency of individuals who use and produce artefacts" (p. 134).

The Distinction Between Activity, Actions and Operations

While Vygotsky is recognized as having created the model for the *instrumental act*, his colleague Leont'ev is recognized as building on this idea to lay down the theoretical ground for different levels in human activity (Engeström, 2015). However, Leont'ev (1978, 1981) does not engage in an exercise to differentiate between different levels of activity for its own sake. There is a rationale for the division. In this section I will present these levels and the rationale behind their theoretical development.

As with Vygotsky (1978), Leont'ev (1978, 1981) also addresses the question of activity in the domain of psychology. In subsequent generations, activity theory moves beyond psychology and becomes an interdisciplinary theoretical framework for research (Blunden, 2010; Sannino & Engeström, 2018). However, for Leont'ev (1978, 1981) human activity has to be a legitimate category of investigation in psychology precisely because consciousness arises from it, and all forms of internal human psychological functions are an extension of it. In other words, Leont'ev, (1978, 1981) argues that all internal images, representations, processes or structures are extracted from external human activity. Human consciousness does not originate as a by-product of the brain or physiological processes but rather emerges as a process of the social relations that arise in practical human activity (Leont'ev, 1978, 1981). The tensions between scientific research that conceptualizes consciousness as an emergent process of activity and those that view it as an emergent property of the brain remain unresolved even today (Arievitch, 2017). The view of consciousness as originating in external activity is crucial because, as noted earlier,

Vygotsky's main concern in psychology was the study of consciousness (Blunden, 2010). In the same manner, Leont'ev's (1978, 1981) rationale behind introducing activity as a legitimate field of study in psychology is to study consciousness. He writes:

In order to find this psychological character of consciousness we have to discard the metaphysical notions that isolate it from real life. We must, on the contrary, investigate the dependence of man's consciousness on his mode of life, on his being. And that means that it is necessary to examine how man's life relationships are built up in any set of socio-historical conditions and what is the special structure of the activity that those relations give rise to. It is necessary, furthermore, to examine how the inner structure of man's consciousness also changes at the same time as the structure of his activity. The characteristics of the inner structure of consciousness are also its psychological ones. (Leontyev, 1981, p. 224)

Hence, the levels of external *collective activity*, *individual actions* and *operations* are constructed and examined by Leont'ev (1978, 1981) in terms of their structure and their relationship to one another in order to understand how these structures are reflected in psychological functioning.

Leont'ev (1978, 1981) derives three levels of activity and formulates them as follows. He establishes that *activity* is driven by *motives* and is necessarily a collective labour process in human societies because of the intricate division of labour across time and space. The motive of activity is embedded in an object, i.e. the carrier of motive. Activity is a higher-level concept in the hierarchy of human behaviour. He then moves to the hierarchically lower-level concept of *actions* which he designates as being conscious *goal-directed* parts of activity, which cannot be separated from it. He finally locates *operations* as the lowest-level concept in the hierarchy and designates them as being acts that are not in the field of immediate consciousness. Operations are governed by the *conditions* of the action under which they are being performed (Leont'ev, 1978, 1981).

Object-Orientedness

Leont'ev (1978) argues that since consciousness originates in the external world, activity has to be taken as *object-oriented activity*. For Leont'ev, this means that every single activity addresses a need of the subject and is directed towards an object which satisfies this need. Here, Leont'ev makes a distinction between two conceptions of need. On the one hand, he argues that there is a type of need that can be conceptualized as an internal condition, such

as hunger, that activates biological or motor functions but that only results in “non-directed seeking movements” (Leont’ev, 1978, p. 54). On the other hand, he notes that there is need “which directs and regulates concrete activity of the subject in an objective environment” (Leont’ev, 1978, p. 53). This second type of need regulates and directs activity only when it meets its object:

A need of some sort is a prerequisite of any activity. In itself a need cannot, however, determine the concrete direction of activity. A need gets its definiteness only in the object of the activity; it has as it were to find itself in it. In so far as a need finds its definiteness in an object (becomes “objectified” in it), the object becomes the motive of the activity, and that which stimulates it. (Leontyev, 1981, p. 239)

Leont’ev (1978) describes this as need being filled “with content derived from the surrounding world” (p. 54). From this, he argues that one activity can be distinguished from another if it has a different object because it is the object that gives activity its direction. This also means that the *motive* of an activity is embedded in its object: the object is the carrier of motive (Leont’ev, 1978).

For Leont’ev (1978) “the concept of activity is necessarily connected with the concept of motive” (p. 62). However, with the simplest division of labour in human societies, motives start to become distanced from the immediate actions of the members of society (Leont’ev, 1978). “The activity of participators in common work is evoked by its product, which initially directly answers the need of each of them.” (Leont’ev, 1978, p. 63). Through the division of labour, the needs come to be answered indirectly through the performance of individual goal-directed actions that bring intermediate results to fulfill the motive (Leont’ev, 1978). In his own words:

The actions that realize activity are aroused by its motive but appear to be directed toward a goal. Let us suppose that the activity of man is aroused by food; this also constitutes its motive. For satisfying the need for food, however, he must carry out actions that are not aimed directly at getting food. (Leont’ev, 1978, p. 63)

Leont’ev (1978) gives specific examples such as the fisherman making a net to be used by others at some future time and some other place. He gives the example of the famous primeval hunt where the beater frightens the animals and sends them toward other hunters for the collective hunt to be successful (Leontyev, 1981). In each of these examples, something like a need for food or clothing, etc. is what initially stimulates the activity and directs it

toward an object. However, at the immediate rational level, the actions of the individual people are goal-directed, such as making a net or frightening the animal towards a certain direction during the hunt (Leont'ev, 1978, 1981). Therefore, the motive that arouses the activity and the goal that directs the action do not coincide (Leont'ev, 1978).

Moreover, the performance of the individual goal-directed actions, such as shooting to hit a target, are composed of numerous *operations* that must be performed and seamlessly put together: positioning the body, holding one's breath, aligning the rifle etc. (Leontyev, 1981). For a trained person, these are not *actions* that their consciousness isolates as having specific goals but rather automatically performed operations dependent on the conditions of the action: put together, they make up the action (Leontyev, 1981).

However, these levels in activity are not fixed. In Leontyev's (1981) example, an operation, such as that of positioning the body to shoot a target rises to the level of a goal-directed action if the subject has not yet mastered the move and is consciously practicing to do so. In the same manner, actions become activity when, as a consequence of the division of labour, individual goal-directed actions result in a shift of the motive into the action itself (Leontyev, 1981). The shift occurs,

when a person undertakes to perform some actions under the influence of a certain motive, and then performs them for their own sake because the motive seems to have been displaced to their objective. And that means that the actions are transformed into activity. Motives of activity that have such an origin are conscious motives. They do not become conscious, however, of themselves, automatically. (Leontyev, 1981, p. 238)

For Leontyev (1981) then, it is necessary to study these shifts and replacements over time to understand "how the inner structure of man's consciousness also changes at the same time as the structure of his activity" (p. 224). These external structures and shifts in motive bring meaning to ideas such as alienation where "the subjects of work activity, cannot construct the object of their work as a meaningful motive. The intricate division of labor and the abstractness of the object make motive construction exceedingly difficult" (Engeström, 1990, p. 108).

Based on these conceptualizations, Engeström (2001) views activity theory as evolving over three generations. He argues that Vygotsky's development of the idea of the mediated act depicted in Figure 3 represents the first generation where focus is on the

mediated individual act. Engeström (2001) views second generation activity theory as being marked by the works of Leont'ev where the individual act (which is now called an action) and collective activity become distinguished. In his theory of expansive learning, Engeström (2015) expands on Leont'ev's idea of collective activity as a unit of analysis by introducing additional integral components to a model which he calls a human *activity system* (Figure 2). Hence based on this new model of the human activity system, Engeström (2001) argues that there is now a third generation activity theory where at least two activity systems are taken as the unit of analysis in their interaction with one another in a complex network of relationships. For example, Engeström gives the example of a school and states that there are multiple activity systems in this environment where one would designate the “school-going activity of all the students and the teaching activity of the teacher as two activity systems which interact and try to find common ground” (Ploettner & Tresseras, 2016, p. 91). The two cannot be viewed as a single activity system because the object toward which the activity of the educators are directed are different from the object of the activity of students (Ploettner & Tresseras, 2016). Engeström finally argues that a fourth generation of activity theory is emerging where the focus is on social movements and creating alternatives to capitalist modes of organizing (Ploettner & Tresseras, 2016).

In the next section, I will present Engeström's (2015) model of the human activity system and start to discuss how it is applied in the theory of expansive learning.

Engeström's Activity System

The theory of expansive learning is a process or phase theory that explains how culturally new forms of activity are produced (Engeström, 2015). In other words, while the question of *how* transformation happens is explained by the process of expansive learning, the question of *what* is being transformed is answered by the elements of the activity system (Engeström, 2001).

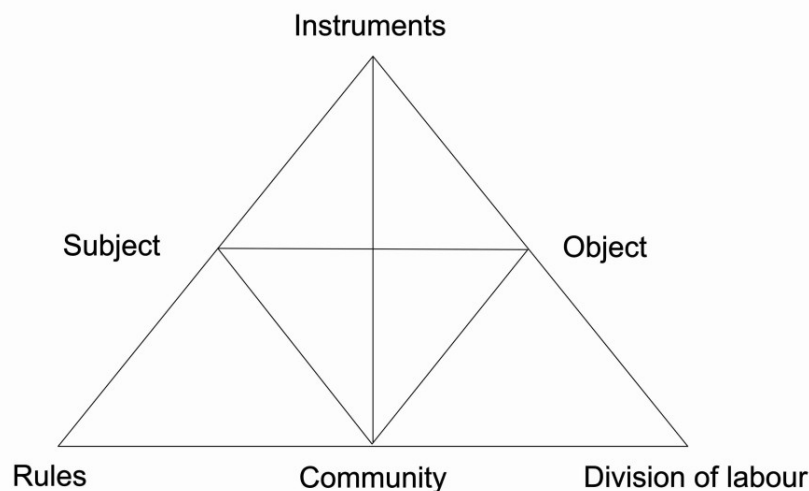
In the process of expansive learning, collective subjects aspire to transform any given social practice, which is represented in its skeletal form in Figure 5 (Engeström, 2015). In the previous sections I underlined that the founders of activity theory were interested in introducing consciousness into psychology, which is why the external structure of action and activity needed to be understood (Blunden, 2010). Once this was done, Engeström and Miettinen (1999) point out that, for the most part, past activity theory studies focused on the *internalization* of cultural means and structures. The authors highlight that

today externalization, the transformative construction of new instruments and forms of activity at collective and individual levels, has become an equally central theme of research. (Engeström & Miettinen, 1999, p. 11)

Engeström's (2015) expansive learning theory is primarily focused on the process of *externalization* to build a new activity system.

Figure 5

Engeström's Model of the Human Activity System



Note. The structure of the human activity system with its indivisible elements as a unit of analysis, as modeled by Engeström (2015, p. 203).

In terms of graphic representation, the triadic structure formed by the subject, the mediating artefact (instruments) and the object are retained by Engeström (2015) in the upper part of the triangle and the new elements of rules, community and division of labour are introduced in the lower part (Figure 5). Engeström (1990) calls the upper triad “the visible tip of the iceberg of *collective activity*” (p. 172, emphasis in original). The upper triad represents goal-directed actions by individuals, so the complex structure in Figure 5 should be treated as being layered to include operations, actions and collective activity (Engeström, 2015). The invisible lower part contains those elements that pertain to the socially distributed and mediated nature of the activity system (Engeström, 1990). In the expansive learning process, the point is ideally to bring about change in all of these elements and their relations to one another. There is a special focus on transforming the object by means of transforming the

instruments (Engeström, 2015). As noted earlier, the object is what defines activity and hence activity will be transformed when its object is transformed (Leont'ev, 1978, 1981).

Following the lineage of the cultural historical school, Engeström (2015) maintains that the model of the activity system is indivisible and is “the smallest and most simple unit that still preserves the essential unity and integral quality behind any human activity” (p. 65). To put this another way, activity is *the category* which Leont'ev (1978, 1981) insisted should become an object of inquiry in psychology; the elements of activity are not in themselves categories, they are constituent concepts. In this section, the elements of the activity system will be explained in terms of their relationship to other elements since no single element can be singled out and understood on its own without reference to the others.

With regard to the graphic representation of an activity system, Sannino and Engeström (2018) summarize the elements as follows:

The subject refers to the individual or subgroup whose position and point of view are chosen as the perspective of the analysis. Object refers to the raw material or problem space at which the activity is directed. The object is turned into outcomes with the help of instruments, that is, tools and signs. Community comprises the individuals and subgroups who share the same general object. Division of labor refers to horizontal division of tasks and vertical division of power and status. Finally, rules refer to the explicit and implicit regulations, norms, conventions and standards that constrain actions within the activity system. (p. 45)

As depicted in Figure 5, there is a complex relationship of mediation across all of the elements.

An activity system is defined by its object, however the identification of the object in an activity system is difficult due to its inherent ambiguity and fluidity (Sannino & Engeström, 2018). For example,

the blacksmith (subject) uses a hammer (instrument) to mold a piece of iron (object). So the piece of iron is the object. But at one moment the piece of iron is a shapeless chunk, at another moment it is an identifiable, socially meaningful entity. Object is both “anything presented to the mind or senses” and “an end or aim” (Webster’s Dictionary, 1987, p. 257). So the object is both something given and something projected or anticipated. This very duality of the meaning of the term indicates that the concept of object carries in it the processual, temporal, historical nature of all

objects. Objects are objects by virtue of being constructed in time by human subjects. (Engeström, 1990, p. 107)

According to Blunden (2010) the constituents of activity are functional elements in that the object is not an object because of anything intrinsic to it, rather “the object is an object *for* the subject” (p. 174, emphasis in original). According to Mäkitalo (2005) “the term ‘object’ refers to any thing, other persons, process, or phenomenon outside the individual subject to which her actions are basically directed.” (p. 94).

The point Engeström (1990) makes about the dual nature of objects as being both *given* and *anticipated* is further elaborated by Engeström and Blackler (2005) who note that objects also have a life of their own and restrict the subject who is working to transform them. The authors argue:

First, it would be a mistake to assume that objects are “just given”; objects are constructed by actors as they make sense, name, stabilize, represent and enact foci for their actions and activities. Second, at the same time it would also be a mistake to assume that objects are constructed arbitrarily on the spot; objects have histories and built-in affordances. they [sic] resist and “bite back”. (Engeström & Blackler, 2005, p. 310)

In Engeström’s (1990) example of the iron, the subject does not have total freedom to transform the object into anything she desires and is further constrained in the choice of instruments for working on it. Miettinen (2005) points out that the idea of objects as independent actors that push against the will of subjects is at the forefront of theories such as Latour’s actor-network theory, which is critical of social constructivism for failure to recognize this aspect of objects in the social sciences. According to Latour,

Natural objects are naturally recalcitrant; the last thing that one scientist will say about them is that they are fully masterable. On the contrary, they always resist and make shambles of our pretensions to control. (Latour, 2000, as cited in Engeström & Blackler, 2005, p. 308)

This becomes evident when the object of an activity is another person with its own activity system. For instance, Engeström (1990) studies how doctors construct patients as the objects of their own work activity by analyzing 85 patient consultations in a health center in Finland. The videotapes of the consultations are then viewed by the doctors and patients who are asked to comment on the interaction. For the doctors in this study, the *patient* is the

embodiment of the object which the entire activity of the doctor is oriented towards; the patient is “the raw material, the perceptual-concrete immediate appearance of the object” (Engeström, 1990, p. 109). This raw material can then be constructed and delineated in many ways, for example *the patient as a lesion* or *the patient as a consumer of services* (Engeström (1990). However, the patient itself has its own life activity system in which it is positioned as the subject. Therefore the patient also has its own object which is “sensuously experienced problems or symptoms” (Engeström, 1990, p. 109). As the two activity systems interact in an intricate way during a consultation, Engeström finds that the doctor is unable to construct the patient as a passive case of an illness described by medical jargon. He points out that the patients take initiative during the consultation to guide the diagnosis and tell life stories pointing to the causes of their pain as well as links to other life activities. The study shows that the, “the object is not only constructed by the subjects, it also constructs itself” (Engeström, 1990, p. 126).

Object construction in activity theory is possible through *instruments* (Engeström, 1990). In the same study, the models used by both doctors and patients as mediating artefacts (instruments) are analyzed to understand how they clash and operate during a consultation. For example, one of the doctors’ views of patients in general is mediated by the model of the patient as a consumer of healthcare services (as established by responses to hypothetical scenarios during an interview). This model was identified in the study as corresponding to an administrative-economic theory of medical practice. However, the doctor is unable to operate with this model during an actual consultation because of the resistance of the patient, who uses artefacts such as medical books provided by the pharmacy and pushes for recognition of her working conditions in the diagnosis and treatment (Engeström, 1990).

The other elements of the activity system are always at play. For example, a doctor who sees patients as having a social life situation and uses a socio-medical model as a mediating artefact in the scenarios is unable to use this model in the consultation because she is constrained by the *rules* of the activity system (Engeström, 1990). The study finds that the explicit rule of the system as a whole dictates that drop-in patients without an appointment would be allocated less time and only provided with limited medical services to ensure immediate relief of symptoms. Therefore the *rule* becomes an element that is likely to have had a greater influence in mediating the relationship between the subject and the object compared to the model of medical practice (Engeström, 1990).

The elements of the activity system point at what needs to be analysed at a minimum, they are not the analysis itself (Sannino, 2011). This means that in any human activity such as child-rearing, scientific research, teaching, farming, writing, we would need to examine the rules, the division of labour and the community as elements that shape the activity. Even when we analyse a single individual as the subject, they need to be positioned within this structure, otherwise, their individual actions, which constitute the upper triad, will not make sense (Engeström, 1999a). Moreover, in expansive learning, the initial unreflected object should be transformed “to a collectively meaningful object constructed by the activity system” (Engeström, 2001, p. 136).

With respect to social movements, one of the most striking examples of how a novel activity is created through the transformation of these elements is the Free Software Movement. It is important to note that a *novel* or *new* practice does not mean novel in the sense that it has never been seen before: it should be novel for the community who is working in that activity system (Engeström, 2015). However, the Free Software Movement is particularly striking because the instruments used and the model of organizing work are novel at a global scale. A quick glance at this example starts to show how the different elements of an activity system manifest in practice, and also how two separate activity systems conflict to take control of the object.

Richard Stallman, the originator of the Free Software Movement points at the stark distinction between the understanding of *computer code as private property* and *computer code as a common good to be shared for the benefit of all* (Stallman, 2002). If we follow Sannino and Engeström (2018) and take code as the raw material of the activity of programming we see that there is a fundamental difference in the construction of this object by different groups. But who are these groups? Stallman’s (2002) account of the history behind the Free Software Movement is understood at a deeper level when viewed through the lens offered by Cox and Nilsen (2014) by situating neoliberalism as a movement from above and looking at the initiatives of the actors of this movement. Stallman (2002) notes that in the early years, “we did not call our software ‘free software,’ because that term did not yet exist; but that is what it was” (p. 17). Stallman (2002) speaks of the early years when operating systems were being written for new computers and the code for those operating systems was freely shared with all programmers who were interested. So, *code as a common good to be shared for the benefit of the society* was how the object of the activity of programming was constructed in the very beginning, albeit without much reflection, because that is just how it

was. The interventions of dominant groups acting within the neoliberal movement pushed to alter how the object ought to be constructed and what new rules were to be introduced. As Stallman (2002) argues, what we take as given today (as the system) was not always the practice, there was deliberate initiative to constrain a practice which could not be naturally constrained. Miettinen (2009) notes,

knowledge is a paradigmatic case of the “public good”; that is, its availability to one consumer is not diminished by its use by another. It is therefore not suitable at all for exchange in markets, where scarcity is the premise. This is why knowledge has to be made a marketable commodity through copyrights and patents. (p. 172)

To constrain programming activities, non-disclosure agreements, copyright restrictions were introduced as *rules* to mediate the relationship between corporations, programmers and third parties as well as to constrain the community’s notion of how *code* as the object of work ought to be seen (Stallman, 2002).

As Engeström and Sannino (2010) note, in the expansive process through which new activity systems are created, “the learners construct a new object and concept for their collective activity, and *implement* [emphasis added] this new object and concept in practice” (p. 2). Therefore it is not enough to have a vision or world outlook (a tertiary instrument) about how the object should be viewed. In Stallman’s (2002) story, the world outlook or vision of *free software* or *user freedom* was articulated as a vision only after code was appropriated by dominant groups as a commodity. That world outlook had to be translated into practice. This was done partly through the creation of the General Public License (GPL) which animated that vision by crafting new rules:

So we needed to use distribution terms that would prevent GNU software from being turned into proprietary software. The method we use is called *copyleft*.

Copyleft uses copyright law, but flips it over to serve the opposite of its usual purpose: instead of a means of privatizing software, it becomes a means of keeping software free.

The central idea of copyleft is that we give everyone permission to run the program, copy the program, modify the program, and distribute modified versions – but not permission to add restrictions of their own. Thus, the crucial freedoms that define “free software” are guaranteed to everyone who has a copy; they become inalienable rights. (Stallman, 2002, p. 22, emphasis in original)

In addition to the rules, there are differences in the division of labour between activity systems where code is produced as proprietary commodity and activity systems where it is produced for the commons (Miettinen, 2009). For Stallman (2002), the demonstration that the type of non-hierarchical, distributed division of labour actually works in practice is the strongest evidence and inspiration to back up arguments in favour of free software. A division of labour specific to programming activity in the Free Software movement was necessary, alongside the new rules, to put the vision into practice. It is the construction of precisely these types of practices that show us how Wartofsky's (1979) possible worlds can be made possible. Sullivan (2011) writes:

The free software movement has also spearheaded the development of an alternative form of cultural labor—one which harnesses the power of collective labor via the Internet, which exists parallel to, and often in opposition to, the wage-labor system of post-industrial capitalism. (p. 237)

While pointing to these new ways of organizing work, Sullivan's (2011) main argument is that the Free Software Movement has developed into a *social justice* movement because “open source computer programmers and users are increasingly connecting their own activities to larger philosophical issues of free speech and democratic information access” (p. 237). This is an epitome of what Engeström (2015) refers to as *object expansion*. Object expansion is what gives expansive learning its name (Engeström, 2015). In the example, the raw unreflected object which is *code* was expanded into a reflected object first by dominant groups (code as commodity) and then by the Free Software Movement (code as commons). Drawing from Sullivan (2011), we can say that the object of *code as commons* is further reconstructed over time, across the members of the movement, to become *code as an exercise of free speech in a transparent society*. In terms of social movement discourse, this is that level when a struggle of *militant particularism* (a term coined by Williams, cited in Cox & Nilsen, 2014) starts “transcending those particularist origins and building towards a more encompassing form of mobilization” (Cox & Nilsen, 2014, p. 78).

However, activity systems (regardless of whether they form a part of a social movement) are in a state of constant movement (Engeström, 2015). Siltala et al. (2007) point out how the organization of work around hybrid projects for software production between firms and volunteer groups constantly produces conflicts, tensions and disturbances. These are what drive the movement of activity systems and they will be addressed in the next section.

Contradictions as the Source of Movement and Transformation

In the previous section, the elements of the activity system were presented to explain *what* is being transformed in expansive learning. In this section, the notion of contradictions will be explained to answer the question of *how* transformation happens. Contradictions are the specific focus of the main and supporting question of this study. The questions *How do social movement participants create new knowledge and practices?* and *What are the enablers and obstacles to the creation of new practices?* will both be answered by analyzing the extent to which contradictions in the relevant activity systems of Kaos GL have been resolved.

In activity theory and expansive learning “contradictions are the driving force of transformation” (Engeström & Sannino, 2010, p. 5). Contradiction is a distinct category and foundational concept in dialectical logic, which warrants a clear theoretical conceptualization to avoid being equated with other terms such as “paradox, tension, inconsistency, conflict, dilemma or double bind” (Engeström & Sannino, 2011, p. 370). “A dialectical contradiction refers to a unity of opposites, opposite forces or tendencies” (Engeström & Sannino, 2011, p. 370). In his discussion of the dialectical method employed by Marx in his works, Wilde (1991) explains these two paradigms as follows:

Dialectical philosophers claim that contradictions exist in reality and that the most appropriate way to understand the movement of that reality is to study the development of those contradictions. Formal logic denies that contradictions exist in reality, and where they are seen to exist in thought, they have to be expunged in order to arrive at the truth. (p. 275)

Both activity theory and the theory of expansive learning are dialectical theories that acknowledge and study contradictions as the source of movement and transformation (Engeström, & Sannino, 2010). However, as Miettinen (2009) points out, the concept of contradiction can only be used if it is operationalized in empirical studies. Engeström and Sannino (2011) emphasize that contradictions are not readily observable phenomena in empirical studies, instead, “they become recognized when practitioners articulate and construct them in words and actions” (p. 371). Terms such as paradox, tension, disturbance, problem or conflict, which are erroneously used interchangeably with contradiction are regarded as the symptoms or manifestations of a contradiction and examined to understand how they operate within a given activity system (Engeström, 2001; Engeström & Sannino

2011). Movement or transformation in an activity system comes about not by reconciling or embracing its inner contradictions, but by *resolving* them to transcend the existing situation to attain “something qualitatively different from a mere combination or compromise between two competing forces” (Engeström & Sannino, 2011, p. 371).

Engeström (2015) identifies four levels of contradictions in an activity system. The primary and general contradiction in the modern capitalist system emerges between the use value and exchange value of commodities and permeates all activities. The idea of the inherent contradiction between use value and exchange value in every commodity was developed by Marx in his analysis of the capitalist system and his identification of the *commodity* as the simplest category to understand the workings of capitalism (Wilde, 1991). In the activity theoretical application of this principle, the primary contradiction between use value and exchange value manifests itself as unrest residing *within* each of the elements of the activity system (Engeström, 2015). In other words, every object, every subject, every instrument, etc., as an element of the activity system carries within its own dynamics both a use value denoting the actual use it has for people and an exchange value which signifies its financial value in the market economy. But how does this contradiction translate when we talk about the inner dynamics of an element like *rules*? Engeström (2015) first establishes that the rules mediating an activity system can be both tacit and explicit. For example, he gives the example of scholarly research and points out that within the explicit and tacit rules governing the activity system of research, exchange value can play out in rules such as “get published, get tenure, get grants – in other words, keep your eyes on the external success markers when you conduct your research” (Engeström, 2016a, p. 6). However, at the same time, another set of rules are present which denotes use value: “take risks to change the world – in other words, keep your eyes on the needs of people when you conduct research” (Engeström, 2016a, p. 6). For cases like these, it is of utmost importance to underline that “it is not a question of ‘choosing’ the more appealing alternative within each corner of the model. One has to take both. The contradiction cannot be swept away by moral decisions” (Engeström, 2015, p. 95). In other words, the contradiction is very real and one cannot wish it away or get rid of it at the individual level.

The simultaneous existence of use value and exchange value can be seen in the object of computer code which I mentioned earlier in the context of the Free Software Movement. For example, Miettinen (2009) argues that this inner contradiction is so great that it pushes in opposite directions towards two completely different ways of organizing work. This state of

constant clash between use value and exchange value is referred to as the *double nature* inherent to the constituents of the activity system (Engeström, 2015). Engeström (2016a) notes that “a primary contradiction appears as something problematic and uncomfortable but not yet as a crisis that unavoidably demands transformative action and radical redesign” (p. 5). The primary contradiction has to be aggravated to become noticeable in secondary contradictions (Engeström, 2015).

As opposed to primary contradictions, which occur *within* the elements of the activity system, Engeström (2015) argues that secondary contradictions occur *between* the elements. For example, when new and more advanced instruments are introduced into an activity system, which has historically functioned using the old instruments, there is typically a contradiction between the new instruments and the element of division of labour if the latter has not been reorganized to align with the new instruments (Engeström, 2015). Secondary contradictions may manifest as mismatches, disturbances, tensions and conflicts between a number of elements in the activity system (Engeström & Sannino 2011). Mäkitalo (2005) points out that secondary contradictions should be viewed as a matter of lack of synchronicity in a process of change. In other words, when one element changes, the other elements are not immediately adjusted to align with this change. In fact, they may even go in opposite directions (Mäkitalo, 2005). For example, Miettinen (2009) argues that the use value aspect of commodities such as software call for a distributed division of labour that makes use of the general intellect. In other words, if the object of the activity system is reconstructed to bring its use value to the forefront (e.g., *code as commons*) this is immediately going to require a reformulation of the other elements. For instance Stallman’s (2002) account of the history of the Free Software Movement shows how an entirely different way of constructing computer code pushed for a need to develop new rules, new instruments and a new division of labour around it. *Code as proprietary commodity* is not the same object as *code as commons* in a programming activity. When one aspect of the object is brought forward, it pushes for a new way of doing things. When the object is changed in this fashion, it leads to secondary contradictions between the object and other elements (Engeström, 2015). In Miettinen’s (2009) example, the focus is on division of labour: when the raw object of code is reconstructed “new nonmarket and nonhierarchical forms of organization are needed that allow the development of individual capabilities and call for trust-based collaboration, and that favor the exchange of knowledge and understanding between the participants in the general intellect” (p. 169). In expansive learning, the participants of an activity system are

expected to identify, analyse and resolve the secondary contradictions between the elements of their own activity systems (Engeström, 2015).

Tertiary contradictions arise between objects or motives (Engeström, 2015). More specifically, when a new object or motive is introduced to the activity system, there tends to be tensions between the old object and the new object of the more advanced activity system. The way this is experienced is when an old activity system is transformed into a new one with a new object but the remnants of the old system get in the way of its functioning (Engeström, 2015).

Quaternary contradictions are mismatches, tensions or disturbances between the central activity system and other activity systems that it interacts with (Engeström, 2015). These contradictions typically manifest when the central activity system is transformed but the neighbouring activity systems are not yet adjusted to its changes (Engeström, 2015).

Successive resolution of contradictions in the expansive learning process is what leads to the generation of new activity systems (Engeström, 2015). However in this process, it is once again important to note that

contradictions are tricky because one cannot simply choose one side and reject the other one. One has to take both and deal with their interplay and constant clashing. The expansive way out is to find and develop a platform that emerges as a qualitatively new opening and transcends the dualistic opposition. (Engeström, 2016a, p. 6)

In the current study, the contradictions experienced in the various activity systems of the Media School are examined using a methodological framework developed by Engeström and Sannino (2011). A detailed description of this framework is presented in the chapter on Research Design. In the next section, the foundational concepts behind the theory of expansive learning will be presented to show how they link to the concepts of activity theory and contradictions.

The Theory of Expansive Learning

Earlier, I presented Leont'ev's (1978, 1981) distinction between conditioned operations, goal-directed actions and motive-driven collective activity. Leont'ev (1978, 1981) argues that these are the general structures we would see in any activity. In other words, we would observe these same structures in all specific activities such as hunting, farming, programming etc. Engeström's (2015) main question when developing the theory of

expansive learning can be rephrased as follows: If we use Leont'ev's general structures and apply them to the phenomenon that we call *learning*, what would a *learning operation*, a *learning action* and a *learning activity* look like, and what would be their objects?

To answer this question, Engeström (2015) engages in a historical analysis of the earlier forms of human learning as well as the “presently dominant forms of societally organized human learning” (p. 74). He argues that prior to the emergence of conscious transmission of knowledge in human societies, the earliest forms of learning were incidental: “in terms of activity theory, this kind of incidental learning consists of nonconscious *learning operations*, embedded in the daily participation in joint work” (Engeström, 2015, p. 74, emphasis in original). Such incidental learning is historically followed by the first conscious *learning actions* “directed to the single person, the individual apprentice” (Engeström, 2015, p. 74). In this second case, “the subject is consciously aware of the object of the action as an object of learning” (Zinchenko, as cited in Engeström, 2015, p. 75). However the learning actions are again embedded in work activity in which the primary goal is to solve problems relevant to the work itself (Engeström, 2015).

Historically, if unintentional learning as part of everyday work activity is a *learning operation* and intentional learning by the individual apprentice to solve work related problems is a conscious *learning action*, Engeström inquires where and how *learning activity* emerges “as an independent activity system” (2015, p. 75). To explore this, he investigates three potential activity types as possible sources of learning activity: school going activity, work activity and the activity of scientific and artistic production (Engeström, 2015). In this investigation he seeks to answer questions such as who are the subjects, what is the object, what are the instruments and what are the products of these activity systems. His conclusion is that traditionally, school-going activity produces subjects while science produces instruments to be used both by science and other activity systems. However, work activity produces not only a product but also the way of organizing work that makes such production possible (Engeström, 2015). This is the fundamental aspect of work activity that Engeström (2015) singles out as *learning activity*. Hence “learning activity is an *activity-producing activity*” (Engeström, 2015, p. 99, emphasis in original).

Engeström (2015) conceptualizes *learning activity* as the conscious construction or transformation of an activity system by “the people who participate in that activity” (p. 91). In the examples given earlier to illustrate the elements of an activity system, the objects appeared as objects towards which work activity was oriented. In the case of learning

activity, *the object is the activity system itself* (Engeström, 2015). Expansive learning is the term used to describe learning activity. In other words, when Engeström (2015) speaks of *learning by expanding* or *expansive learning*, he is referring to the collective and conscious transformation of an activity system through the resolution of its contradictions by the people who are participants of that activity system. He writes:

The object of learning activity is the societal productive practice, or the social life-world, in its full diversity and complexity. The productive practice, or the central activity, exists in its present dominant form as well as in its historically more advanced and earlier, already surpassed forms. Learning activity makes the interaction of these forms, that is, the historical development of activity systems, its object. (Engeström, 2015, p. 99)

It is important to remember once again that before arriving at the theoretical definition of learning activity noted above, Engeström's (2015) motivation was to derive a learning theory that explained how new cultures and practices emerged. He specifically notes that he is not in search of a theory that only explains how subjects internalize cultures or practices that are already there (Engeström, 2015). He makes this point clear when, for example, he argues that Lave and Wenger's (1991) initial conceptualization of learning as legitimate peripheral participation in communities of practice "have little to say about transformation and creation of culture" (Engeström, 2010, p. 2). Elsewhere, Engeström and Miettinen (1999) argue as follows:

The theory of legitimate peripheral participation depicts learning and development primarily as a one-way movement from the periphery, occupied by novices, to the center, inhabited by experienced masters of the given practice. What seems to be missing is movement outward and in unexpected directions: questioning of authority, criticism, innovation, initiation of change. Instability and inner contradictions of practice are all but missing. (p. 12)

Once Engeström (2015) establishes that he is seeking the mechanisms behind transformations leading to novel practices, he also makes it clear that, due to its very nature, this process cannot be conceived of as an individual learning initiative. In other words, we are dealing with "learning processes in which the very subject of learning is transformed from isolated individuals to collectives and networks" (Engeström & Sannino, 2010, p. 5). It might well be the case that the initial questioning of existing practice comes from individuals,

however, in order for individually experienced unrest to transform the actual practice, a collective subject is required (Engeström, 2015; Engeström & Sannino, 2010).

Going back to the graphic representation of an activity system in Figure 5, the object of learning activity for Engeström (2015) becomes the activity system itself together with all its constituent elements that carry the potential for transformation.

A theoretical delineation of *learning activity* as an *activity producing activity* does not say anything about how that activity is supposed to be produced. To address this question Engeström (2015) builds on two interlinked ideas proposed by Gregory Bateson (2000): the concept of the double bind and the concept of Learning III. In the next section I explain these concepts as they were originally proposed and how they are reformulated by Engeström (2015) in activity theoretical terms.

Gregory Bateson's Concept of the Double Bind

The idea of the *double bind* was originally proposed by Bateson et al. (1956) as an explanation for the ontogenesis of schizophrenia. More specifically, Bateson et al. (1956) argue that there is an experiential component in the ontogenesis of this pathology and they approach the problem from the perspective of communications theory. They explain that the double bind is a situation that arises as a result of repeated sequences of communication over time in which an individual receives two messages of different orders that contradict one another but the individual is unable to comment on their contradictory nature. Here, I will give a summary of the process leading to this situation since I believe it is important in understanding how the concept of the double bind is later expanded and reinterpreted by Bateson (2000) when he develops his learning theory, as well as how it is reformulated by Engeström (2015) in the framework of expansive learning.

Bateson et al. (1956) theorize the communication sequence between a mother and a pre-schizophrenic child that leads to a double bind as follows. The mother, who is anxious of feelings of affection towards her child but is aware that withdrawal or hostility are unacceptable behaviour, communicates at least two different messages to the child. First she withdraws when the child approaches her (withdrawal may or may not be accompanied with verbal messages). When the child reads this message accurately and responds to it by withdrawing, the mother gives a second message of simulated loving behaviour and at the same time blames the child for having reacted to her initial behaviour. This second message is regarded by the authors as being a *higher-order message* in the sense that it contains

information as to how the initial message (withdrawal) ought to have been interpreted. In the case of the mother, she gives a higher order second communicative message to the child implying that her initial unloving behaviour should not be interpreted as unloving, and that the child was wrong in having interpreted it as such. Bateson et al (1956) explain that the double bind arises as follows: if the child interprets the mother's initial message accurately as unloving withdrawal and reacts, she is blamed. If, on the other hand, the child interprets it as the mother dictates (that the initial message is not unloving behaviour), she is punished in the next cycle when she attempts to approach the mother but once again faces withdrawal or hostility. As a result of repeated cycles of these communication sequences,

the child is placed in a position where he must not accurately interpret her [the mother's] communication if he is to maintain his relationship with her. ... As a result the child must systematically distort his perception of metacommunicative signals. (Bateson et al., 1956, p. 257)

Here, it is important to understand what is meant by metacommunicative signals and their distortion since these concepts have a bearing on Bateson's (2000) subsequent reformulation of double bind theory. Bateson et al. (1956) note that the framing and labeling of communicative messages are important for their accurate interpretation. For example, *humor*, *play* and *metaphor* are among such frames or labels that are of a higher order and that enable people to interpret how a verbal message imparted within these frames ought to be interpreted (Bateson et al., 1956). In other words, these are communicational modes that have accompanying signals (such as gestures or intonation) that set the context for how a verbal message (or other forms of messages) should be interpreted (Bateson et al., 1956). The authors note that the ability to discriminate between communicational modes allows for ease of communication between people because it enables the accurate interpretation of distinct pieces of messages delivered in the framework of these modes. Bateson (2000) later introduces the term *context markers* to describe the pieces of information used to differentiate between these different communicational modes. In cases where people are unsure of how to interpret an initial message, they make metacommunicative statements to each other to inquire whether they have understood the context accurately (Bateson et al., 1956). If the child is unable to communicate about a sequence of communication to clarify what it means, the child "grows up unskilled in his ability to communicate about communication and, as a result, unskilled in determining what people really mean and unskilled in expressing what he really means, which is essential for normal relationships" (Bateson et al., 1956, p. 258).

Bateson's (2000) idea of a hierarchy of contexts or messages is central to double bind theory. By definition, metacommunicative signals are hierarchically higher-order messages than the distinct messages they frame (Bateson et al., 1956). In the case of the pre-schizophrenic child in Bateson et al.'s (1956) study, the initial communicational sequence where the mother withdraws is a clear first order message signaling unloving behaviour. At the point when the mother insists that the initial message is something else, she is offering the child a distorted second order message or frame to make sense of such individual pieces of behaviour.

For Bateson et al. (1956) patterns of behaviour that are observed in schizophrenic patients, such as the inability to differentiate between literal and metaphorical messages, are indicators of such confusion regarding the framing of messages or contexts. For example, they note that a schizophrenic may take a joke literally or may respond to a literal statement as if it were a metaphor that denotes something else. The inability to discriminate between metacommunicative signals (contexts or frames) that give meaning to verbal signals are hypothesized as being the effect of the double bind in individuals who have a genetic predisposition for schizophrenia. They emphasize that the way out is to transcend the situation by making metacommunicative statements, such as pointing out to the mother that there is a contradiction between her actions. However, they also underline that the child is unable to do this either because she is too young and does not have the means or because she is forbidden from it by the mother who would refuse to accept it and blame the child once again for suggesting that there is a contradiction. The double bind does not just describe a stressful situation or a dilemma, it arises out of an interaction over time in which metacommunicative signals are negated and confused (Bateson et al., 1956).

Bateson (2000) later extends the concept of the double bind and argues that those patterns of behaviour which are categorized as the pathological symptoms of schizophrenia are, in fact, only one syndrome among a class of syndromes that are not conventionally diagnosed as pathologies. For Bateson (2000) schizophrenia is only one manifestation of what he calls *transcontextual* syndromes. He argues that a transcontextual syndrome may manifest itself in the form of confusion of contexts as witnessed in pathologies or in the form of creativity marked by humour, art, poetry, which he calls *transcontextual gifts*. He also points out that such transcontextual gifts are manifested in those instances where events or words are reframed and presented in a context so unexpected and so unusual that they promote laughter or awe as in the case of humour, poetry and art. In other words, Bateson

(2000) argues that the double bind promotes transcontextual syndromes, both those that are commonly regarded as pathologies and those that are regarded as creativity. He reformulates the notion of the double bind as “experienced breaches in the weave of contextual structure” (Bateson, 2000, p. 276). For Bateson, context or contextual structure is the set of rules, the patterns that guides a subject in putting together distinct pieces of information. The double bind is a tangling of these rules that normally enable an individual to discern context so that she may choose the appropriate response and schizophrenia is a specific pathological product of such tangling of the rules (Bateson, 2000). How, then, do *creative* transcontextual syndromes emerge?

To illustrate how the double bind may lead to creativity Bateson (2000) uses an example from a public exhibition during which a trainer demonstrates operant conditioning with a porpoise in a water tank. The demonstration is later repeated as an experiment (Bateson, 2000). Here, I refer to both the original sequence of events and the later experiment. The original demonstration of operant conditioning occurs over a number of sessions with a porpoise where the animal is expected to display a different piece of behaviour every time it comes before the public (Bateson, 2000). In the first session, a piece of behaviour (raising its head above water) is reinforced with a whistle and the porpoise is fed by the trainer (Bateson, 2000). This first piece of behaviour is easily reinforced. Bateson (2000) notes that the animal “has learned some simple rules which relate her actions, the whistle, the exhibition tank, and the trainer into a pattern—a contextual structure, a set of rules for how to put the information together” (p. 276). However, in the next session, the rules no longer hold because the animal is now expected to exhibit a new behaviour, different from the one in the previous session: “She must break that pattern to deal with the *class* of such episodes. There is a larger *context of contexts* which will put her in the wrong.” (Bateson, 2000, p. 276, 277, emphasis in original). For a number of episodes the animal displays the piece of behaviour reinforced in the previous session. However it finally learns to “deal with the context of contexts—by offering a different or *new* piece of conspicuous behaviour whenever she came on stage” (Bateson, 2000, p. 277, emphasis in original).

When the same training is repeated in an experimental setting with a different porpoise, Bateson (2000) notes two significant observations. The first is that the tangling of the rules that determine context lead to observable frustration in the animal. To maintain its relationship with the porpoise, the trainer has to offer reinforcements even when the expected

behaviour is not exhibited. Second, although the novel displays of behaviour seem to have occurred by chance,

in the time-out between the fourteenth and fifteenth sessions, the porpoise appeared to be much excited, and when she came on stage for the fifteenth session, she put on an elaborate performance including eight conspicuous pieces of behavior of which four were entirely new—never before observed in this species of animal. (Bateson, 2000, p. 277)

Bateson (2000) argues that these two observations from the experiment show two aspects of how a transcontextual syndrome arises: “first, that severe pain and maladjustment can be induced by putting a mammal in the wrong regarding its rules for making sense of an important relationship with another mammal” (p. 278). This is also what is observed in the relationship between the mother and the child in the ontogenesis of schizophrenia (Bateson et al., 1956). However, according to Bateson (2000) “if this pathology can be warded off or resisted, the total experience may promote *creativity*” (p. 278, emphasis in original) as witnessed in the unanticipated display of novel behaviour by the porpoise. Hence, Bateson (2000) places the double bind at the heart of his learning theory to explain how creative breakthroughs could be generated. Now, we need to go back to how he situates the double bind in his learning theory.

Gregory Bateson’s Levels of Learning

For Bateson (2000) all adaptive behaviour requires feedback loops for the organism to adjust its behaviour and respond appropriately. For Bateson, this necessarily means that there is some form of trial and error in the sense that there is exhibition of a piece of behaviour, feedback about whether the behaviour is correct and then change or preservation of the piece of behaviour. Because error is expensive for the organism, some form of adaptive change is needed to reduce the amount of trial and error. This is why he argues that learning must be hierarchic in the sense that some higher-level rules need to be learned in order to address not just specific phenomena but a whole class of phenomena without having to renegotiate each individual problem or engage in random trial and error in the face of every single particular task. Bateson notes that these higher-level changes are the acquisition of *habits* based on abstract propositions, assumptions or premises about an entire class of phenomena. Because of the distinct function they serve, habits are rigid: “the very economy of trial and error which is achieved by habit formation is only possible because habits are comparatively ‘hard

programmed” (Bateson, 2000, p. 274). In light of the idea that learning happens by trial and error and that there is also hierarchy in learning, Bateson proposes his levels of learning based on the types of error which need to be corrected at each level.

For Bateson (2000) Learning I is the elementary type of learning by trial and error which includes different forms of conditioning and rote learning: “those items which are most commonly called ‘learning’ in the psychological laboratory” (p. 288). Learning II is change or error correction in Learning I, in the sense that rather than engaging in random trial and error, the subject uses some unconsciously formed habit and treats the context as if it has the same pattern as the previous context in which a specific type of behaviour worked. As noted above, this is the level that provides economy to avoid the expense of trial and error.

According to Bateson, Learning II is the tacit acquisition of patterns of behaviour or habits. He notes that “learning II is adaptive only if the animal happens to be right in its expectation of a given contingency pattern” (Bateson, 2000, p. 294). By contrast, Learning III is change or error correction in Learning II where the unconscious habits or premises are consciously examined and deliberately transformed by the subject. He argues that the transition from Learning I to Learning II has the benefit of economy of effort and is observed in humans and most mammals. However, he emphasizes that the transition from Learning II to Learning III is rare even in humans and it *is induced by the double bind when previously acquired habits that once helped to discern contexts no longer work* (Bateson, 2000).

Reformulation of the Double Bind and Bateson’s Levels of Learning

Engeström (2015) reinterprets both the concept of the double bind and Bateson’s levels of learning in terms of activity theory. Earlier, I noted that Engeström (1999a) expresses criticism against applications of activity theory that neglect the notion of mediation. When reformulating Bateson’s levels of learning in the framework of activity theory, we see that he is specifically focused on the different forms of mediating instruments that are characteristic of these levels. To differentiate between types of mediating instruments, Engeström (2015) resorts mainly to Wartofsky’s (1979) scheme of artefacts. To interpret the hierarchy of the levels of learning, he uses Leont’ev’s (1978) hierarchy of operations, actions and activities. Again, because he is focused on learning as the creation of the new, Engeström (2015) is primarily interested in Bateson’s Learning III, since this is the level where deliberate and conscious transformation takes place. However, he reformulates each of the levels to situate Learning III in a new framework (Engeström, 2015).

According to Engeström (2015), Learning I corresponds to unconscious operations in Leont'ev's hierarchical scheme. He notes that in Learning I, "both the object/outcome and the instruments are given. Learning means repetitive corrections in the way the subject uses the instrument upon the object. There is a fixed correct way that is to be obtained" (Engeström, 2015, p. 115). Following Wartofsky's scheme, he argues that "instruments at this level may be called tools or primary artifacts" (Engeström, 2015, p. 115).

According to Bateson (2000), Learning I and Learning II cannot be severed from one another as if they are two independent phenomena; they necessarily occur together. Engeström (2015) explains this phenomenon as follows: "as the given tasks are repeatedly accomplished within Learning I, a tacit representation or image of the way of accomplishing the tasks is necessarily generated" (p. 115). According to Engeström (2015), once we begin to talk of tacit representations, we enter the realm of secondary artefacts in Wartofsky's classification. But a dilemma arises. In Bateson's (2000) Learning II, habits are formed unconsciously. On the other hand, Wartofsky (1979) describes secondary artefacts as being reflexive. Engeström (2015) addresses this dilemma by reformulating Learning II as both reflexive and unconscious. He argues that Learning II "is best conceived of as oscillation between two ways of making models, two kinds of generalizations" (Engeström, 2015, p. 116). In other words, the outcomes of Bateson's (2000) Learning II, which are described as tacitly acquired habits are viewed by Engeström (2015) as models (or secondary artifacts/instruments) which may be consciously or unconsciously constructed. Hence, Engeström (2015) divides Learning II into two subcategories: *reproductive* and *productive* based on whether they are unconscious or reflexive and argues that "the latter, productive aspect cannot be totally eliminated from Learning II, even if it may well be subordinated to the point of invisibility" (p. 117). Where Learning I is an immediate response, "in Learning II, the object is conceived of as a problem, demanding specific efforts" (Engeström, 2015, p. 118). Engeström (2015) reconceptualizes Learning II under Leont'ev's hierarchy as goal-directed actions to solve "*discrete, given problems*" (Engeström, 2015, p. 119, emphasis in original).

Above I noted that for Bateson (2000) Learning III is promoted by the double bind experienced when a subject's previously acquired tacit habits (as a result of Learning II) no longer work. To repeat: "learning II is adaptive only if the animal happens to be right in its expectation of a given contingency pattern" (Bateson, 2000, p. 294). When Learning II is no longer adaptive, or when "the context bombards participants with contradictory demands"

(Engeström, 2001, p. 138) a double bind arises. Bateson (2000) emphasizes that the next level necessitates conscious examination. For Engeström (2015), this is the level of learning where neither the problem nor the procedures for its solution is given. They both have to be constructed. For this to happen, a higher level of instruments is needed (Engeström, 2015). For Learning III Engeström (2015) applies Wartofsky's level of tertiary artefacts but argues that they should be interpreted as higher level "methodologies or visions or world outlooks that serve as guidelines in the production and application of secondary artefacts, that is, models" (Engeström, 2015, p. 121). So if Learning III is distinguished by the need to construct the problem as well as the procedures to solve the problem when faced with a double bind, it "may now be characterized as the construction and application of world outlooks or methodologies – or ideologies, if you will." (Engeström, 2015, p. 121). Here, the words construction and application are vital. Learning III, as interpreted by Engeström (2015) requires an imaginative leap for the construction of tertiary instruments. But it must go beyond imagination and translate into practice where the whole system of activity is transformed. When Wartofsky (1979) describes this level of artefacts he underlines that they are not a representation of existing societal practice but that they point to a possible world. Engeström's (2015) theory calls for this possible world to be brought into existence. Bateson (2000) notes that Learning III can be dangerous. In response, Engeström (2015) argues that it is dangerous when it manifests at the individual level because it then takes the form of personal crises and breaks with the system. This is because "the real production and application of world outlooks, restructuring of complex activity systems, is not conceivable in individual and drastically sudden terms alone" (Engeström, 2015, p. 125). Learning III for Engeström (2015) corresponds to what he terms *learning activity* or *expansive learning* and necessarily requires a collective subject for the practical application of such higher-level instruments. It cannot be achieved individually. In activity theory terms, transition from Learning II to Learning III is transition "from individual actions to the public or collective mode of activity" (Engeström, 2015, p. 126).

In light of the interpretation of Learning III as collective learning activity, Engeström (2015) goes back to reformulate the double bind:

The type of development we are concerned with here – expansive generation of new activity structures – requires above all an *instinctive or conscious mastery of double binds*. A double bind may now be reformulated as a *social, societally essential dilemma that cannot be resolved through separate individual actions alone – but in*

which joint cooperative actions can push a historically new form of activity into emergence. (p. 131, emphasis in original)

This reformulation becomes clearer when we revisit Bateson's (2000) example of the porpoise from Engeström's (2015) perspective. For Engeström (2015), the creative breakthrough of the porpoise is not an illustration of a breakthrough to Learning III. He writes:

Though the porpoise went through an intensive dilemma and resolved it by producing genuinely new behavior, she never produced new instruments in the proper sense of the word. She did not produce implements or models that could be communicated about, preserved, and transmitted among her own species. (Engeström, 2015, p. 132)

This interpretation is in line with Bateson's (2000) argument that Learning III is rare even among humans and most probably non-existent among other mammals. However, Engeström (2015) also points out that the pattern of behaviour demonstrated by the porpoise is not just unconscious construction of habits that fits neatly under Learning II. His reformulation of Bateson's Learning II as oscillations between unconscious habit formation and conscious model generation addresses the paradox observed in the example of the porpoise (Engeström, 2015).

In this section, I have presented the initial conceptualization of the double bind by Bateson et al. (1956) and the subsequent extension of this concept by Bateson (2000) to account for possible transitions from Learning II to Learning III. I have also presented how Engeström (2015) reinterprets Learning III as collective learning activity or expansive learning, in which new, higher-level instruments are generated. This reinterpretation of Learning III as a collective enterprise consequently leads Engeström (2015) to the reformulation of the double bind as a socially experienced "contradiction that uncompromisingly demands *qualitatively new instruments* for its resolution" (p. 139, emphasis in original). In light of these concepts, in the next section, I return to the model of the expansive learning cycle to discuss how new activity systems are generated.

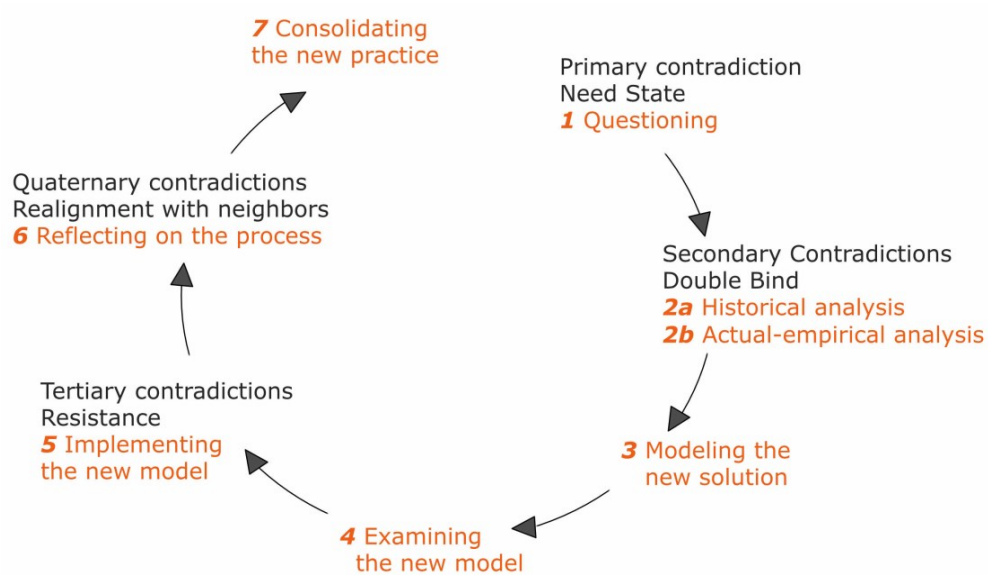
The Expansive Learning Cycle

Engeström (2001) notes that "Bateson's conceptualization of Learning III was a provocative proposal, not an elaborated theory" (p. 139). In this section, I will present Engeström's (2001; 2008; 2015) elaboration of the stepwise process through which expansive learning takes place. The process described below, and represented for the second time in

Figure 6 is the *activity producing activity* which is the central idea of Engeström's (2015) work.

Figure 6

The Expansive Learning Cycle



Note. The expansive learning cycle with its distinct phases and levels of contradictions, as described by Engeström (2001, p. 152).

The expansive learning cycle typically comprises seven learning actions which together “should be understood as construction and resolution of successively evolving tensions or contradictions in a complex system” (Engeström, 2008, p. 131).

The first learning action is called *questioning*. This first phase is marked by tensions in which subjects may reject certain practices or voice complaints (Engeström, 2008). As noted earlier, the initial questioning may manifest as disturbances experienced and voiced by individual people in the activity system (Engeström, 2015; Engeström & Sannino, 2010). The phase can also be characterized by a deviation from the norms and rules of the activity system by individuals who find that such norms or rules no longer work (Engeström, 2001). “The direction is *from the individual to the societal*” (Engeström, 2015, p. 252, emphasis in original). The phase is marked by the primary contradiction within the elements of the activity system. It was noted earlier that “a primary contradiction appears as something problematic and uncomfortable but not yet as a crisis that unavoidably demands

transformative action and radical redesign” (Engeström, 2016a, p. 5). Therefore the initial questioning phase is one in which the latent character of the primary contradiction is yet to aggravate into a double bind and transformed into an articulated problem (Engeström, 2015).

The second action is called *analyzing* (Engeström, 2008). This is the phase in which subjects start to ask *why* a certain practice is the way it is or why a problem is being experienced. The phase includes types of analyses such as *historical-genetic*, in which subjects trace the development of a practice or a problem and try to understand how it originated, and *actual-empirical*, in which they try to find an explanation for the current state of affairs by analyzing systemic relations in the current system (Engeström, 2008). This is the phase in which the initial unrest experienced in the first phase is aggravated into a double bind (Engeström, 2015). In this stage, the primary contradictions lead to a secondary contradiction *between* the elements of the activity system (Engeström, 2015). Because expansive learning entails mastery of the double bind, conscious examination of the secondary contradictions in this phase of the cycle is of utmost significance for the expansive learning process to continue (Engeström, 2001). In other words, the collective analysis phase is required to resolve the double bind which Engeström (2015) expresses “as a *social, societally essential dilemma that cannot be resolved through separate individual actions alone – but in which joint cooperative actions can push a historically new form of activity into emergence*” (p. 131, emphasis in original).

The third action is called *modeling* (Engeström, 2008). This is the phase in which rudimentary forms of the new instrument are created and applied to generate a new model of activity (Engeström, 2015). Engeström (2008) notes that in modeling, we are looking to see whether subjects are “constructing an explicit, simplified model of the new idea that explains and offers a solution to the problematic situation” (p. 130). This phase is depicted as the phase in which a *breakthrough* is experienced in terms of a solution (Engeström & Sannino, 2010). In this phase, we are still operating with secondary contradictions. But it is the phase in which the analysis has yielded a new framework, new ideas for instruments and a possible new model for an activity (Engeström, 2001).

The fourth action is called *examining the new model* (Engeström, 2008). Here, subjects test whether the new instruments work and identify their limitations. Examination can take the form of critical discussions in which subjects consider whether and how the new model will work (Engeström, 2008).

The fifth action is called *implementing the new model* (Engeström, 2008). Here, we are talking about actual concrete practical application of the instruments and the new model of activity. Once such practical application takes place, subjects experience tertiary contradictions specifically because the remnants of the old form of the activity conflict with the new activity (Engeström, 2015). This is depicted as resistance by the old activity system to the new activity system (Engeström, 2001).

The sixth action is *reflecting on the implementation* (Engeström, 2008). The process is marked by an examination of quaternary contradictions that arise between the new activity system and its neighbouring activity systems (Engeström, 2001).

The seventh action is *consolidating the new practice* (Engeström, 2008). Consolidation is the action of stabilizing the new practice or activity system (Engeström, 2008). At this stage, the newly generated activity system is not new anymore (Engeström, 2015). The focus is still on the quaternary contradictions between the new activity system and its neighbouring activities (Engeström, 2015). However, “Paradoxally, this implies also that the activity system begins to defend and encapsulate itself. But the new activity is not a closed system. ... In short, it must coexist and interact within a network of activities” (Engeström, 2015, p. 151). In the course of interaction with the neighbouring activity systems, the stabilized activity system experiences new latent primary contradictions which may aggravate into a double bind when a new element is introduced into the activity system from the outside (Engeström, 2015). This is why the expansive learning cycle is a continuous process.

According to Engeström (2015) an expansive learning cycle is the “*basic unit of expansive learning*” (p. 152, emphasis in original). Rather than being a clear-cut, linear and short-term process, “there appear iterative transitions back and forth among the phases of the cycle” (Engeström, 2015, p. 152). In other words, the expansive learning cycle is not to be interpreted as rigid universal progression from one phase to the next (Engeström, 2008). Engeström stresses that “one probably never finds a concrete collective learning process that cleanly follows the ideal-typical model” (2008, p. 131). Instead of being approached as a formula, the model should be used as a heuristic tool (Engeström, 2008).

The seven phases in the expansive learning cycle indicate movement by means of the resolution of contradictions identified and articulated at each phase (Engeström, 2015). This conceptualization already indicates that there is no automation in the process and therefore no

guarantee that expansive learning will take place (Engeström, 2015). The movement through the phases is regarded by Engeström as movement through the zone of proximal development. However, the concept of the zone of proximal development, which was first developed by Vygotsky (1978) is reinterpreted by Engeström (2015) to account for a collective creative process. In the following section I will present an overview of the concept of the zone of proximal development as originally proposed by Vygotsky (1978) and the rationale for its reformulation by Engeström (2015).

Vygotsky's Zone of Proximal Development

Vygotsky (1978) introduces the concept of the zone of proximal development in the context of discussions around the relationship between a child's level of mental development and her learning. This discussion is significant because a child's learning has to be both matched to her level of development and can be understood in the light of that development (Vygotsky, 1978)). The concept is therefore linked to how children's developmental levels are measured and how the subsequent course of school learning is determined. For Vygotsky (1978) it is not sufficient to conceptualize a child's level of mental development as a fixed state that can be determined by taking a snapshot of her performance at a given time based on her capability to independently perform certain tasks. He states that any assessment conducted in this way measures only those functions that have already matured in the child. However, he underlines that development is an ongoing process and measurements that focus on the outcomes of individual performance fail to capture "those functions that have not yet matured but are in the process of maturation, functions that will mature tomorrow but are currently in an embryonic state" (Vygotsky, 1978, p. 86). Functions that have already matured, as demonstrated by independent performance in children, are "the end products of development" (Vygotsky, 1978, p. 86). These are the indicators of the child's *actual level of development* (Vygotsky, 1978). On the other hand, functions that are in the process of maturation are called the child's *potential level of development* (Vygotsky, 1978). Vygotsky argues that the method for determining the potential level of development is to assess a child's performance while she undertakes certain tasks under the guidance of a teacher or a more experienced peer. This is critical because "the capability of children with equal levels of mental development to learn under a teacher's guidance varied to a high degree" (Vygotsky, 1978, p. 86). For example, Vygotsky notes that children's performance in problem solving varies to a great extent when they are offered leading questions or when the task is initiated

by a teacher and they then complete the procedure. Based on these observations Vygotsky (1978) defines the zone of proximal development as follows:

It is the distance between the actual developmental level as determined by independent problem solving and the level of potential development as determined through problem solving under adult guidance or in collaboration with more capable peers. (p. 86, italics in original)

Reformulation of Vygotsky's Zone of Proximal Development

Engeström (2015) makes two main points when discussing the need to further develop the concept of the zone of proximal development. First, he argues that the zone of proximal development tends to be treated in teleological terms –as movement by the child towards what is already given and expected by adults, such as reaching a solution that is known ahead of time or acquiring existing cultural practices and patterns of behaviour. From this perspective, he points out that even the child cannot be conceptualized as a mere assimilator of culture as defined by the adult. For example, in play, while children may mostly reproduce patterns of activity and roles that are already observable in society “once in a while parents are astonished as they find their children playing something that does not seem to fit any preconceived canons: Something new has been produced ‘from below’” (Engeström, 2015, p. 138). Elsewhere Engeström (1999a) points out “that the early studies led by Vygotsky, Leont’ev, and Luria not only examine the role of *given* artifacts as mediators of cognition but were also interested in how children *created* artifacts of their own in order to facilitate their performance” (p. 26, emphasis in original). However, Engeström’s (2015) main argument with regard to the zone of proximal development is that with a few exceptions, Vygotsky did not say much about creativity in the developmental process.

Closely linked to the notion of creativity is the second point Engeström (2015) sees lacking in the conceptualization of the zone of proximal development. This is the question of how new societal forms of activity are created by the *collective*. He underlines that just as human development cannot be described as mere acquisition of culture, it also cannot be described solely as individual creativity. In line with the idea that the creation of new cultures and activity systems is necessarily a collective process, he argues that the zone of proximal development has to be reformulated to account for human development as collective creative movement in the zone. Earlier I mentioned that Engeström conceptualizes expansive learning

as transition “from individual actions to the public or collective mode of activity” (2015, p. 126). In line with this idea, he reformulates the zone of proximal development as follows:

It is the distance between the present everyday actions of the individuals and the historically new form of the societal activity that can be collectively generated as a solution to the double bind potentially embedded in the everyday actions. (Engeström, 2015, p. 138, italics in original)

With this new conceptualization, movement through the seven phases of the expansive learning cycle is viewed as movement in the zone of proximal development not towards something that is already there, but towards something that is possible or imaginable by the collective (Engeström, 2015). In other words, according to Engeström, “the zone of proximal development is understood as an open-ended space of possibilities” (Ploettner & Tresseras, 2016, p. 90). To put this another way, a collective subject going through the *learning activity* or *expansive learning cycle* depicted in Figure 6 is on a journey in the zone of proximal development to transform the activity system depicted in Figure 5 (Engeström, 2015).

Engeström (1995) emphasizes that a full transformation of an activity system by means of movement through the expansive learning cycle takes a long time. However, he also points out that we need to consider multiple scales of expansive learning (Engeström, 2016b). For example, a macro-cycle of expansive learning in collective activity systems is at a historical scale and represents radical transformations in the activity that take place over years and decades. In addition, there are intermediate or meso-cycles of local transformation occurring over months and years, which are the primary focus of research and interventions (Engeström, 2016b). Finally, he notes that these meso-cycles host micro-cycles of expansive learning occurring over a number of hours or days where there are concentrated efforts of transformation (Engeström, 2016b). However, the existence of such mini-cycles does not guarantee that the activity system will be transformed at the meso level (Engeström, 2016b).

In the current study, the development of the Media School from 2007 and 2020 is analyzed using the expansive learning cycle. Some parts of the analysis will be focusing on macro-level changes that took place slowly over the course of thirteen years. Other parts will focus on the meso-level, examining changes that occurred in a period of several years.

Chapter Three: Research Design

Methodology

I have noted earlier that Engeström (2015) conceives of the model of the activity system as indivisible and as “the smallest and most simple unit that still preserves the essential unity and integral quality behind any human activity” (p. 65). This view entails the understanding that individual actions cannot be understood and will not make sense unless they are viewed as part of an activity system. Therefore, the unit of analysis in activity theory studies is not the individual person but the entire activity system.

With respect to the ontology of the current study, Virkkunen and Newnham (2013) draw on Tolman’s (1981) work to explicate that activity theory, and by extension, expansive learning, subscribe to a *process-ontology* as opposed to an *object-ontology* or a *relations-ontology*.

Tolman (1981) points out that the nature of reality is not one in which we first have individual static things that exist with their distinct properties. He argues that the nature of reality also cannot be conceived of as one in which individual static things with properties only later enter into a relationship with other things and develop new qualities. This means that, from a dialectical view of the nature of reality, individual things were never static, never pre-existed their relations, and therefore can never be conceived of as independent from their relations. By extension, relations are conceived of as not external to a thing but internal to it. Tolman (1981) designates dialectics as the philosophy of internal relations where movement comes about as a result of inner contradictions of things. The structure of the activity system as a unit of analysis and the expansive learning cycle which moves through the resolution of the inner contradictions of activity systems are both theoretical constructs that serve to capture the philosophy of internal relations and self-movement which characterise a process ontology (Virkkunen & Newnham, 2013).

With regard to how this theoretical paradigm reflects on research methodology, Mäkitalo (2005) points out that a study of activity systems lends itself to a case study design as a logical choice. Moreover, the principle of historicity, which encapsulates the idea of a process-ontology, is integral to activity theory (Sannino & Engeström, 2018). This principle, which entails the understanding that one may understand a phenomenon only by understanding its historical development, has methodological implications. Therefore, the case in the current study has been delineated as the historical development of Kaos GL’s

Media School from its inception up to the present day. The period covered is from 2007 up to the time the interviews for this study were conducted in 2020.

With respect to the expansive learning cycle, I use the cycle as an analytical tool to retrospectively reconstruct the historical development of certain aspects of Kaos GL's Media School. I do not use it to test the theory by checking whether the development of the Media School's activities actually followed the phases. I also do not use it to study the dynamics of specific phase transitions. Instead, I use the cycle to locate the contradictions in various activity systems of the Media School to examine how they were resolved.

The Main and Supporting Research Questions Revisited

In this section I expand on the main and supporting research question using activity theory concepts to specify the focus of the study. The two questions are as follows: "How do social movement participants create new knowledge and practices?" and "What are the enablers and obstacles to the creation of new practices?"

For the purposes of this study, new knowledge basically means the knowledge of a new practice. A new practice, from the theoretical standpoint of expansive learning, is one that has arisen in response to the real contradictions observed by practitioners (Engeström, 2015). Therefore, from this theoretical standpoint I take a new practice as one that has resolved its inner contradictions. I have noted earlier that Engeström (2015) conceives of expansive learning as movement through the phases of the cycle by means of articulating and resolving the contradictions of the activity system. Therefore, resolution of contradictions is the *how* of the expansive learning process. One of the most significant aspects of the Change Laboratory sessions is that interventionist researchers prompt participants to clearly articulate and resolve contradictions of their activity that may have manifested as disturbances, conflicts or other problems (Engeström, 2007b). The purpose of the question "How do social movement participants create new knowledge and practices?" is to identify initiatives in the Media School that were instrumental in the resolution of contradictions.

The supporting question helps to build up to the main question. Its purpose is specification. The purpose of the supporting question "What are the enablers and obstacles to the creation of new practices?" is to specify the methods through which contradictions were successfully resolved as well as the reasons why they remain unresolved. The status of resolution of a contradiction has been determined by following the data analysis method,

which will be explained below. The status of resolution of a contradiction was not established solely by the opinions of the interview participants but through the analysis.

Tracing the historical development of activity systems necessarily requires tracing changes in the object of activity (Engeström, 2015). Although the focus of this study is not to trace the dynamics of object construction specifically, the question of whether any changes have taken place in the object of activity over time is embedded in the current study and is addressed in the analysis.

Method of Data Collection

The main source of data in the current study was semi-structured, in-depth narrative interviews. The secondary source of data was the news reports published on Kaos GL News Portal that were relevant to the Media School as well as Kaos GL's publishing principles and procedures.

The narrative interviews were designed to enable interview participants to reconstruct the history of the activities that surrounded the Media School from its inception to the present day. Participants were asked to share specific documents produced or used in the process of building the Media School. During the interviews, the interview participants pointed to specific news stories that were publicly available on the Kaos GL News Portal. No additional internal documents were used as a data source.

In the following sections I first explain the selection criteria and recruitment procedure for interview participants. This is followed by an explanation of the procedure and rationale behind the semi-structured, in-depth narrative interviews. Finally, I also explain the rationale behind document collection.

Participant Recruitment Procedure

At the beginning of the study, Kaos GL Association was asked to identify three to five potential participants based on the selection criteria given to them in a debriefing letter describing the purpose of the study and the level of engagement expected from participants. The purpose of the study and selection criteria were explained in the debriefing letter as follows:

The overall purpose of the interviews is to document the development of the Media School from its inception to the present day. Therefore, the interviews will be conducted with participants who are involved in the activities of the Media School today as well as those who

were involved in these activities in the past. In line with this overall purpose, the inclusion criteria for participants are as follows:

- 1- **To obtain a historical account of the Media School:** Persons who have actively taken part in the development of the **idea** of the Media School and/or in the process of **initially putting the idea into practice**. These persons may be current OR past employees of Kaos GL. In addition they may be persons who are not members of staff but who can testify to the process of how the idea was generated and subsequently implemented.
- 2- **To obtain an account of the current activities of the Media School:** Persons who are actively involved in designing and/or implementing the current activities of the Media School. These persons may either be staff Kaos GL or non-staff who are affiliated with Kaos GL.

The criteria described above do not imply two separate categories of participants. A single participant may be able to meet both criteria.

In addition to the information above, the individual consent forms were sent to Kaos GL to be shared with potential participants. Two people who fulfilled the selection criteria sent their signed consent forms. The interviews were conducted with these people.

Interviews

Semi-structured, in-depth narrative interviews were conducted with the two participants using Skype. The interviews were originally designed to be conducted in two phases with each interview session lasting 1 to 1.5 hours with each participant. This means that each participant was asked to take part in two rounds of interviews lasting 1 to 1.5 hours each, and 2 to 3 hours in total. Two rounds of interviews were conducted with one of the participants and one round with the second participant due to their unavailability for the second round. The interviews were conducted in Turkish with participants located in Turkey. The video interviews were audio recorded. In what follows, I explain the rationale behind dividing the interviews into two phases.

The research question of this study aims to investigate how new practices are created and aims to specify the enablers and obstacles to the creation of new collective practices. From a theoretical standpoint, one way of describing the expansive learning cycle is that it is a process in which collective subjects successively resolve the contradictions in their activity systems (Engeström, 2008). This means that collective subjects would move (theoretically)

through the cycle as they successively address the primary contradiction within an element, the secondary contradictions between elements, tertiary contradictions between an old form and new form of an activity and finally quaternary contradictions when they try to align their new activity with neighbouring activity systems (Engeström, 2008). When I examine the enablers and obstacles to the creation of a new practice in Kaos GL's Media School, I look at what enabled the resolution of a contradiction or what stands in the way as an obstacle. For instance, in the Analysis section of this study, there are descriptions of instances where remnants of an old activity kept emerging despite the fact that Kaos GL had changed their practices. This is theorized as a tertiary contradiction and is theoretically located at the fifth phase of the expansive learning cycle as resistance to the new practice (Figure 6). Hence, the answers to the research question will be sought by tracing these specific contradictions and understanding how they were resolved or why they remain unresolved.

Engeström and Sannino (2011) argue that contradictions in an activity are not readily observable. Instead they have to be discovered from other subtle manifestations. Manifestations of contradictions can occur in the actions and speech of individuals and hence Engeström and Sannino (2011) propose a methodological framework for identifying and analysing contradictions that arise in the discourse of participants. I give detailed information about this framework in the analysis section. However, the subtle manifestations of contradictions in narrative accounts become apparent only after the interviews are transcribed and analyzed using this framework. For this reason, I divided the interviews into two phases. After I transcribed and analyzed the first interview with one of the participants using the framework, I conducted a second interview with the same person and asked for further elaboration of those narrative segments in which I had identified contradictions. The narrative provided by the second participant in the first interview was used with the available information since there was no second interview to elaborate on aspects that were not addressed. The narratives of the two interviews complemented one another.

The second reason for dividing the interviews into two phases was to be able to analyze the documents that were pointed out by the participants during the first round of interviews. As I noted above, the participants only referred to specific news stories publicly available on Kaos GL News Portal. In the second interview with one of the participants, I asked for clarification about some practices of the Media School based on the information I was able to access from the news stories. I will discuss the documentation aspect below under the sub-section titled Documents.

Data Collection Instruments. The semi-structured, in-depth narrative interview questions were the main instruments used in data collection (Appendix A and B). The interview questions were designed to prompt a narrative account of the historical development of the Media School as well as to give information about routine activities. A narrative is taken “as a spoken or written text giving an account of an event/action or series of events/actions, chronologically connected” (Czarniawska, 2004, p. 17). For the purposes of this study, the historical development of the Media School is a focal point, therefore the final presentation of the historical narrative in the analysis section follows a layered chronology of events. However, during the interviews, the participants were prompted to construct the narrative following a non-chronological order. In her classification of the timeframes for narratives used by both interviewees and interviewers, Czarniawska (2004) speaks of three different timeframes: chronological, cyclical and kairotic. A kairotic timeframe is described as “a narrative time punctuated by important events, which might even run backward in chronology” (Czarniawska, 2004, p. 52). I used a kairotic timeframe when designing the interview questions because I find that this framework is more suitable for identifying events that may shed light on contradictions that lead to change. Rather than asking participants to start from the beginning and talk in general terms about the development of the school, I started with questions about the most recent events or routine events and asked participants to go back in time to make comparisons and give details. Since this study examines change over time or change as a result of the resolution of contradictions, this back and forth comparison of current practice versus past practice served to focus on specific turning points that lead to change. The Interview Guide for the first round of interviews is given in Appendix A. After I transcribed and analyzed the audio file of the first participant, I used the Interview Guide in Appendix B in the second round to clarify and elaborate on what was discussed in the first interview.

Documents

The documents used as data sources were identified during the interviews with the participants. I asked participants for documents they can share with me related to the events they were talking about. I was referred to news stories about the Media School and Kaos GL’s publishing practices on the Kaos GL News Portal. The documents consisted of these publicly available materials.

Ethics

Ethics approval was obtained from Concordia University before initiating the study. On November 12, 2019 I submitted an application to the Research Ethics Unit of the Office of Research. On January 17, 2020, the study was granted conditional approval status with a request for additional information and some changes to the ethics protocol. I was also asked to obtain an official approval letter from Kaos GL. On January 27, 2020, Kaos GL sent an official approval letter agreeing to the study and stating that they grant permission for the name of the organization to be explicitly used in publications. As per the consent forms, the identities of the interview participants have been kept confidential. Full ethics approval was granted by the Office of Research on February 17, 2020.

Timeframe for Interviews and Approval of Transcripts

The data collection procedures started as soon as full ethics approval was granted by Concordia on February 17, 2020. The interviews were held between April and June 2020. I held two interviews with the first participant and one with the second. I transcribed the audio recordings and sent them for approval to each participant. Table 1 shows the dates of separate interviews and transcript approval dates. The interviews were conducted in Turkish. The interview excerpts that appear in English throughout the study are my own translations.

Table 1

Interview and Transcript Approval Dates

	Interview 1	Transcript sent	Approval received	Interview 2	Transcript sent	Approval received
Participant 1	April 9th	April 12th	April 15th	May 31st	June 1st	June 2nd
Participant 2	April 10th	April 12th	April 13th	N/A	N/A	N/A

The durations of the interviews and the word count of interview transcripts are shown below in Table 2.

Table 2

Interview Durations and Transcript Word Counts

	Interview 1 duration and word count	Interview 2 duration and word count	Total interview duration and word count
Participant 1	1h 8min / 6038	1h 37min / 8062	2h 45min / 14100
Participant 2	1h 7min / 8281	N/A	1h 7 min / 8281
	Overall duration for both participants		3h 52min
	Overall word count for both participants		22381

Method of Data Analysis

In very general terms, the analysis of the interview data can be expressed as follows. I examined the narrative interviews to capture the problems or challenges that were experienced with regard to the Media School throughout its development as described to me by the participants. This analysis included the problems or challenges still experienced today. I then examined how these problems or challenges were addressed by Kaos GL, as reported by the participants. Finally I examined whether the changes were effective in overcoming the problems or challenges.

In more theoretical terms, I need to abandon the general notion of problem or challenge and use more specific concepts. Hence, I need to restate the process I described in the foregoing paragraph using theoretical concepts. The restatement is as follows: I analyzed the contradictions in the activity systems relevant to the Media School and identified how they were resolved or why they remain unresolved. As noted earlier, since contradictions are only accessible when they manifest in discourse and actions, Engeström and Sannino (2011) propose a methodological framework for revealing their discursive manifestations. They note that in the past, the general notion of a *disturbance* was used to identify manifestations of contradictions. However to enable a more specific approach, they reserve the notion of disturbance as a general term and propose four categories that need to be searched for in discourse corpus: dilemmas, conflicts, critical conflicts and double binds. Each of these categories is accompanied by linguistic cues that aim to identify contradictions. I used this

framework when coding and analysing the interview data with the qualitative data analysis software Quirkos.

The first category of discursive manifestations of contradictions is dilemmas and is described as follows:

A dilemma is an expression or exchange of incompatible evaluations, either between people or within the discourse of a single person. It is commonly expressed in the form of hedges and hesitations, such as “on the one hand [. . .] on the other hand” and “yes, but”. In ongoing discourse, a dilemma is typically reproduced rather than resolved, often with the help of denial or reformulation. (Engeström & Sannino, 2011, p. 373)

The second category is conflicts. Engeström and Sannino (2011) describe these as follows: “‘conflicts’ take the form of resistance, disagreement, argument and criticism” (p. 373). The accompanying linguistic cues of this category are words that express disagreement such as *I disagree* or *this is not true* or *no* (Engeström & Sannino, 2011).

The third category of disturbance is called a critical conflict. Engeström and Sannino (2011) describe these as follows: “‘Critical conflicts’ are situations in which people face inner doubts that paralyze them in front of contradictory motives unsolvable by the subject alone” (p. 374). Critical conflicts are spotted by looking for emotionally charged personal narratives in which participants use metaphors to express themselves (Engeström & Sannino, 2011).

The fourth category of disturbance is called a double bind. They are described in this context as

processes in which actors repeatedly face pressing and equally unacceptable alternatives in their activity system, with seemingly no way out. Such repetitive processes tend to get aggravated, to the point of reaching crises with unpredictable and “explosive” consequences. In discourse, double binds are typically expressed first by means of rhetorical questions indicating a cul-de-sac, a pressing need to do something and, at the same time, a perceived impossibility of action. (Engeström & Sannino, 2011, p. 374)

Rhetorical questions such as *what can we do* or expressions such as *we must* or *we need to* are the linguistic cues for the double bind (Engeström & Sannino, 2011).

I identified these categories in specific parts of speech. In some cases, the disturbances reported by participants did not fit into any of the four categories. In these cases I coded them using the general notion of disturbance. I later situated each of these in the narrative contexts in which they emerged. The four sections presented in the Analysis of this study reflect these contexts. The disturbances I identified in the interview transcripts are presented in the form of a layered history of challenges and the ways in which they were addressed. This particular method of coding has proven useful for identifying subtle issues that were not necessarily articulated as problems by the interview participants. For instance, some narratives relevant to the Media School were clearly problematized by participants. Other aspects were mentioned in passing. Through the analysis framework, I was able to identify conflicts, dilemmas and double binds as defined above. No instances of critical conflict were identified. Instances that were not problematized by interview participants but which emerged as a result of the analysis are presented in the analysis section.

The second source of data in this study was the news reports pointed out by the participants during the interviews. I use these to give additional information about the Media School and complement the interview narratives. The news stories were not analysed through a systematic content analysis. I used them to clarify and specify the interview data. I also used them to prompt additional information from Participant 1 with whom I had a second interview. For instance, a significant part of the data presented in Section three of the analysis about the Media School's model of interaction with local correspondents was elicited by making reference to these published news reports.

The interviews and the news stories were used as data sources both in the analysis section of this study and in the next section where I briefly describe the case to establish the context of the study.

Chapter Four: Presentation of the Case

Background

Kaos GL Association was founded in 2005 as Turkey's first legally established organization working in the domain of sexual orientation and gender identity. The date of formal organization as a legal entity is important since it marks the very first formation of its kind in the country. However, the history section on Kaos GL's website starts with the story of social organization which predates the legal entity by some fifteen years (Kaos GL, 2011). This historical account highlights the informal conversations among a small group of people in the privacy of their homes in the beginning of the 1990s. The conversations revolve around the question of what to do about issues concerning the gay and lesbian community and the social injustices faced by individuals. It is these informal talks that give birth to the idea of bringing people together as a community to take some kind of action against discrimination and injustice. The idea of publishing a magazine emerges as a meaningful concrete step to fight against discrimination and to ensure visibility (Kaos GL, 2011).

In April 1994, before the magazine was launched, the originators of the idea placed an ad in another weekly cultural and political magazine calling people to join them in this effort (Kaos GL, 2011). The call to gay, lesbian and anti-heterosexists starts by stating that they are not alone and that it is time to change the identities imposed on them by a heterosexist order. The call invites people to make contact via a PO Box address to create a network and walk the road together.

A recent work on an oral history of the people and organizations involved in the LGBT+ movement in Turkey informs us that while people slowly started to respond to this call, the first issue of *Kaos GL Magazine* was actually the fruit of the efforts of two people who painstakingly worked to develop the content, design the cover and layout, print and distribute it with incredibly limited resources to publish the magazine anonymously (Tar, 2019). From the start, there was a declared commitment that this would be a sustained, regular publication. However the commitment was coupled with anxiety about how the publication could be sustained with the available resources.

The first issue of *Kaos GL Magazine* was published in September 1994 as the visible and tangible outcome of these endeavours (Kaos GL, 1994). The first issue is 16 pages. The cover page bears the introductory words of a manifesto placed within a triangle, the symbol of LGBT+ pride (Figure 7). The manifesto runs from the cover page to the second page of the magazine and makes a strong political statement against a male dominant heterosexist order

which has taken different forms throughout history to reach its current form of capitalist exploitation. The manifesto rejects social latency and calls for visibility against a clear antagonist: all political and social forms of heterosexist dictatorship that deny us the right to life (Kaos GL, 1994, p. 2). The first issue includes anonymous political pieces on heterosexist police violence as well as anonymous testimonies of people who are subject to it. It offers a critique of heteronormative socialist and liberal political formations that refuse to recognize any other orientation or identity. Its tone is marked by an anarchist stance, and its call for visibility extends beyond the gay and lesbian community to include all non-heterosexists.

Figure 7

Kaos GL Magazine



Note. The figure shows the cover pages of Issue 1 (September, 1994) and Issue 173 (May, 2020) of *Kaos GL Magazine*.³

In 2019 Kaos GL Association celebrated the 25th anniversary of the magazine. At the time the current study was being finalized, Issue 173 was published addressing the coronavirus pandemic and how lockdowns, quarantines and isolation affected LGBT+ people

³ The cover pages of the first and recent issues of Kaos GL magazine do not infringe copyright as they qualify as fair dealing under Copyright Act, R.S.C. (1985) c. C-42, art. 29. The two juxtaposed cover pages demonstrate the development of Kaos GL Magazine, which is essential for the purposes of this research focusing on the sources and historical development of the Media School.

(Kaos GL, 2020i). This recent issue boasts 57 pages in color and features both original and translated articles and illustrations with a dedicated team of editors. The magazine is sold in both print and digital version with access to all back issues on its own dedicated website (<http://www.kaosgldergi.com>).

Hence, when Kaos GL Association was founded in the summer of 2005, it already had a long history of publishing and social organizing behind it. For example, as a social formation, Kaos GL had visibly attended the May Day rally in Ankara in 2001 with rainbow flags and banners demonstrating alliance with the workers' movement (Tar, 2019). In 2003, the social formation organized the first-ever, large-scale symposium on the problems of gay and lesbian people in Turkey. The event received wide coverage and was openly supported by many intellectuals and writers who attended as speakers. Again, as a social formation Kaos GL was instrumental in the first public Pride March in Turkey in 2003 (Tar, 2019).

Kaos GL works towards the recognition and protection of equal rights for LGBT+ people by fighting against homophobia and transphobia and all kinds of discrimination, by contributing to the visibility of the LGBT+ movement and by empowering LGBT+ individuals in Turkey.

It is important to refer briefly to the context in which Kaos GL conducts its activities. Neither the modern-day Republic of Turkey nor the imperial state that preceded it adopted clauses on the criminalization of same-sex relations (Mendos, 2019). However non-criminalization does not mean or even imply protection or recognition. Sexual orientation and gender identity are not explicitly recognized or protected in the Turkish Constitution under equality clauses. Human rights abuses against LGBT+ in Turkey are repeatedly made visible in international reports and studies (Amnesty International, 2011, 2018; Human Rights Watch, 2020a; Mendos, 2019; Muedini, 2018). While LGBT+ organizations in Turkey strive for visibility and raising awareness, combating discrimination still remains a priority area (Aydın & Özbilgin, 2019; Köylü, 2019; Tar, 2015).

Although LGBT+ organizations in Turkey are seemingly protected under general legal provisions on organizing, Altıparmak (2018) points out that the government employs a new and systematic methodology of violating human rights by referring to legal provisions in an effort to back up ambiguous administrative practices that restrict the rights of LGBT+. For instance, in 2017, the Governorship of Ankara issued an ordinance banning all LGBT+-related activities in the city for an indefinite period of time. The ambiguous justification for the decision invoked grounds such as the possibility of the events to threaten public safety, their possibility to provoke a part of the society who may have different beliefs, their

possibility to provoke several public sensitivities, their possibility to threaten public order, the protection of the rights and freedom of others, the protection of common health or morals, etc. Altıparmak (2018) highlights the lack of any legal clarity or specificity behind the ordinance arguing that such approaches are systematically practiced by government authorities. He states that while the government maintains a façade of legality by drawing on legal clauses to support such decisions, it uses flagship pro-government newspapers as an instrument to openly engage in hate speech and display discriminatory discourse against LGBT+ (Altıparmak, 2018).

In March 2020, the administrative court lifted two successive bans introduced by the Ankara governorship on LGBT+ events (Kaos GL, 2020a). While this may appear as a positive development, hate speech and discrimination against LGBT+ do not cease. The annual Pride Parade had also been banned regularly by the Istanbul Governor's office since 2015 (Human Rights Watch, 2020b). More recently, the Head of the Presidency of Religious Affairs (a state official) delivered a Friday sermon stating that LGBT+ are responsible for illnesses in society including HIV and Covid19 and called on Muslims to protect all people against the menace of homosexuality (Human Rights Watch, 2020b; Kaos GL, 2020b). The sermon sparked a wave of reactions from numerous human rights organizations, bar associations and a number of opposition political party representatives across the country (e.g. Kaos GL, 2020c, 2020d, 2020e). The Ankara Branch of the Human Rights Association made a public announcement condemning the sermon and filed a complaint with the prosecutorial services against the head of Religious Affairs (Kaos GL, 2020f). Instead of prosecuting the religious official, the Office of the Ankara Public Prosecutor launched criminal proceedings against the Ankara Bar Association on grounds that the organization had degraded the religious values of a certain segment of the population by making a public statement against the Presidency of Religious Affairs (Kaos GL, 2020g). The events evoked a public statement from Recep Tayyip Erdoğan, the President of the Republic of Turkey, in which he stated that he agreed with the Head of Religious Affairs, that the official had spoken within his mandate, that his comments were binding only on those who identified as Muslim and did not concern others, and that it was not the business of the Ankara Bar Association to attack a religious official on a matter like this (Kaos GL, 2020h). Erdoğan stated that such reactions to the religious sermon by some organizations were a primitive form of fascism and sadly showed that democracy, pluralism and respect to beliefs were still not established in the country (Kaos GL, 2020h).

The events I presented above would constitute the content of an entire study. I refer to these only briefly to give a general idea of the legal, political and social climate in which Kaos GL operates. Today, Kaos GL works in such a climate with a full-time team of 21 people operating under five programs. These are: the Media and Communications Program, the Academic and Cultural Studies Program, the Human Rights Program, the Refugees Program, and the cross-cutting Administrative and Finance Program that supports the other four programs.

Each year, Kaos GL organizes large-scale events such as the *International Meeting Against Homophobia and Transphobia* held on the week of May 17th, the *Feminist Forum*, the *Symposium Against Discrimination* and other international and domestic events. In 2011, Judith Butler was a guest speaker at Kaos GL's *Fifth International Meeting Against Homophobia and Transphobia* and addressed an audience of over 600 people (Tunçbilek, 2011).

Regular annual publications and studies are among Kaos GL's core activities. These publications include the annual report on the *Human Rights of LGBT+*, the annual study on the *Situation of Lesbian, Gay, Bisexual Transgender and Intersex Employees* in the public and private sector, and the annual *Media Monitoring Report* which identifies hate speech and discrimination in the media (see, www.kaosgldernegi.org). In addition to reports, Kaos GL publishes regular newsletters informing readers of current LGBT+-related events (Kaos GL, 2020j). In addition to *Kaos GL Magazine*, Kaos GL also publishes a peer-reviewed academic journal titled *KaosQ+* on queer theory, which adopts a critical approach to queer theorizing (<http://www.kaos-q.com/arsiv.php>)

Kaos GL was awarded consultant status by UNESCO in the field of bullying in education (Öztop, 2011). Among many international recognition awards, in 2015, the organization received the International Hrant Dink Award from the Hrant Dink Foundation, presented in commemoration of the Armenian-Turkish journalist who was assassinated in 2007 (Kaos GL, 2015b). The award is presented each year by the foundation to individuals and organizations who take risks towards building a world free from discrimination, racism and violence (International Hrant Dink Award, 2019).

The Local Correspondents Training / Media School

In 2007, two years after it was legally established, Kaos GL announced the launch of a program to train LGBT+ people as voluntary local correspondents. The announcement was made in a news article titled "We Will Make Our Own News" (Kaos GL, 2007). The article

starts by paying tribute to *Kaos GL Magazine*'s legacy and underscores its success in giving a permanent voice to people whose words were once lost in the parks, on the streets and in the night. It articulates the intention to carry forward that legacy by weaving a network of local correspondents whose scope of activity would now extend to producing local news content. Although it is not called a manifesto, it reads like one in its tone and clarity of purpose. It designates mainstream media as the most important public space in which homophobia manifests. It presents a strategy and road map aiming to organize study sessions to examine mainstream media news reports, to generate a new and effective discourse against homophobia, to create a space where identities can be expressed freely, to expose news coverage dominated by homophobia, and to disseminate publications to independent news outlets, human rights organizations and international bodies. It calls on the LGBT+ community to join Kaos GL in a two-day training to be held for the first time in Ankara (Kaos GL, 2007). The formation is titled the Local Correspondents Training.

The main goal of the Local Correspondents Training was to empower and train LGBT+ people to produce local news content, which would then be published on Kaos GL's online daily news portal. Participants of the training would become members of Kaos GL's Local Correspondents Network.

In 2007, the first delivery of the Local Correspondents Training took place in a two-day workshop in Ankara, the capital of Turkey, with 15 participants traveling from various cities (Gezmiş, 2007). As of 2008, the training started to be organized in multiple cities to enable greater outreach. The workshops covered topics such as the fundamentals of news reporting, rights-based journalism as well as broader themes related to human rights, discrimination, sexism, homophobia and transphobia.

In 2015, Kaos GL introduced a concept-level change to the training. The scope was broadened to incorporate the use of digital communication tools, social media and web publishing in an effort to equip local correspondents with the skills they need to produce digital content and support their work as activists. The Local Correspondents Training was thus recast under the name The Media School. After 2015, the workshops started to be delivered in multiple stages. Stage I workshops cover fundamentals of news reporting and are oriented towards newcomers. Stage II workshops are more detailed and oriented towards advancing the skills of existing local correspondents who produce content. Today, the Media School continues to operate with the model of a school-on-wheels where different trainers visit multiple cities each year to deliver both core training and more advanced thematic

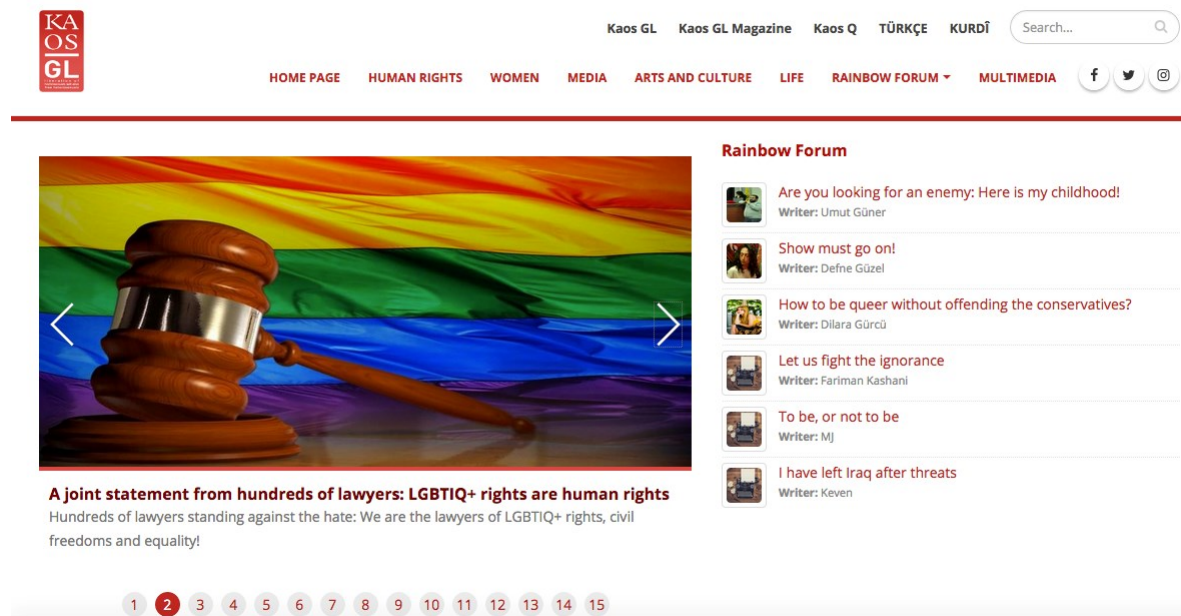
workshops. New initiatives such as dedicated caricature workshops are now included in the Media School's regular activities under the name the Caricature School.

Kaos GL News Portal

Kaos GL's daily news portal sits on a website separate from that of Kaos GL Association. The news portal is accessed through the URL www.kaosgl.org and features LGBT+ related news, opinion pieces, essays, interviews and personal stories of writers (Figure 8).

Figure 8

Home Page of Kaos GL News Portal



Note. The figure shows a screenshot of the home page of Kaos GL News Portal in English, taken on July 2, 2020. The Rainbow Forum on the right features works by local correspondents. The carousel on the left features daily news reports written by Kaos GL.⁴

⁴ The screenshot of the home page of Kaos GL News Portal does not infringe copyright as it qualifies as fair dealing under Copyright Act, R.S.C. (1985) c. C-42, art. 29. Presenting the layout of the webpage is substantial for this research both for giving background information about the main activity which this research concerns and also because much of the analysis presented in Chapter Five, Section 4 involves issues around how the webpage is organized and how content is presented.

The home page is organized in two sections. The headlines section features daily news prepared by Kaos GL. This section is presented on the website in the form of a carousel. Next to this is the Rainbow Forum, which features pieces by members of the Local Correspondents Network. The responsibility for running the news portal and organizing the production of content rests with a dedicated editorial team operating under Kaos GL's Media and Communication Program. At the time of the interviews for this study, the editorial team was composed of three full-time staff members who assumed multiple roles. The editorial team is responsible for producing news content for the portal and selecting and editing content submitted by local correspondents. They are also responsible for designing and organizing the workshops for local correspondents.

The news content produced for the portal also feeds into annual reports published by Kaos GL. For example, in the most recent report on the human rights of LGBT+ people in Turkey, there are 47 citations referring to news stories published on Kaos GL News Portal in 2019 (Öz, 2020). By extension, in its current form, the Media School aims to empower LGBT+ people as both activists and content producers with the understanding that these are not distinct domains that can be separated from each other with clear boundaries. Activism and journalism are merged and the Media School's educational activities are consciously designed to align with this conception.

Chapter Five: Data Analysis and Findings

This chapter presents the analysis and findings in five separate sections. The first four sections are grouped according to the thematic contexts in which the interview data emerged. Section One is about the historical development of the model of the Media School and centers around discussions on finding the true target group. Section Two is about the pedagogical approaches adopted in the Media School over the years. Section Three addresses the model of interaction/communication used by Kaos GL to maintain relations with the Local Correspondents Network. Section Four is about Kaos GL's publishing policy for the news portal and its development over the years. These four sections present a layered history of the Media School by tracing the developments thematically. The theme headings are used to give context. They are not explanatory devices as would be expected in a thematic analysis. The analytical device is the model of the activity system, used in each section, and the expansive learning cycle, used in the last section. Section Five brings together the first four sections and presents an analysis of the successive contradictions that emerged in the historical development of each of the thematic areas using the expansive learning cycle. Section Five concludes by answering the main and supporting research questions.

Each of the sections is organized to first present the context and interview data pointing to some major challenges that were experienced in that context. After this initial data presentation, the sections continue with a presentation of a series of interim analyses. In other words, each section alternately presents the data to set the context and then offers an interim analysis in that context. Each section concludes with a concluding analysis for that section. Section Five offers a final concluding analysis of all four thematic sections.

Section 1: Finding the True Target Group

This section is about Kaos GL's efforts to find the true target group of the Local Correspondents Training. The section should be read bearing in mind that attendance in both the former Local Correspondents Training and the current Media School was always free for participants. In addition, all related expenses such as travel, accommodation, meals and other events organized during the training are covered by Kaos GL within the scope of the relevant grants secured from donors. This continues to be the main model with no intention of change. It is also important to bear in mind that the participants of the Local Correspondents Training are primarily young adults who are university students.

The Purpose of the Local Correspondents Training

The Local Correspondents Training, which is the precursor to the current Media School, was launched in 2007 with a clear goal: to train LGBT+ to produce local news content for Kaos GL's online news portal. Local news content meant LGBT+ related news coverage in the respective cities of local correspondents. While this was the main expectation, the gathering of members of the LGBT+ community in these educational settings started a wave of local organizing over time. This was not a trend that was deliberately planned or anticipated by Kaos GL. The excerpt below describes this gradual development.

Participant 1: In fact, this was something that emerged in the process. The media schools started in 2007. In the process after that, the LGBT organizations that were founded after 2007 were organizations founded by our participants. [...] This kept happening in different cities. [...] So we thought [...] that to produce media content, people need to be organized. And that they can produce content in a space where organized activism is taking place.

The same trend of local organizing was observed especially after the Gezi Park resistance in Turkey during the summer of 2013.

I should note that the phrase *media schools* or *media school* is frequently used by interview participants in reference to both the original formation which was called the Local Correspondents Training as well as the new formation which goes by the name Media School. To avoid confusion in the interview excerpts, I have marked the distinction by using lower case letters to refer to the old formation launched in 2007 (media school) and upper case letters to refer to the new formation launched in 2015 (the Media School).

Over time, Kaos GL staff became aware of this organizing activity:

Participant 1: This lead us to ask the question: Is the media school mainly concerned with encouraging people to organize, or is it concerned with encouraging people to produce content for KaosGL.org? This was the first question we asked.

Although this question is voiced in terms of whether it should be this or that, there is nothing intrinsically incompatible between people who organize and people who produce content. For Kaos GL, it was desirable that people were organizing. And many people who received the training were writing for the news portal. However Kaos GL's expectation was that the returns from the training should be higher. As they reflected on this question, they developed

the understanding that organizing and news reporting are not dichotomous categories of action that must be taken separately.

Participant 1: So, there are times when it goes beyond what we were expecting and this is something we want now. So, for example in 2006 when we were expecting them to produce content for Kaos, we are now also concerned with empowering activists who can engage in LGBT activism on social media and media.

However, while organized activity was recognized as being closely linked to content production, there remained the question of making sure that the Local Correspondents Training was effective in doing what it was designed to do. Towards the end of 2013, there was an increase in the intensity of discussions exploring how to support organized activism on the one hand, and ensure that content was produced for the news portal on the other. This was an effort to differentiate between target groups while recognizing that they do not necessarily occupy a single category.

Participant 1: The only thing that Kaos was doing for activists was the media school. And naturally, activists or those wanted to become activists who also wanted to have contact with Kaos were obliged to make this contact through the media school. We thought that if we could provide different options for people who wanted to be in contact with Kaos or for those who wanted to do different kinds of work with Kaos, then the media school would be able to find its own target group.

It is important to note that at this point, around the end of 2013, Kaos GL was already supporting local organizing efforts to some extent. However the need to address them more systematically became clearly articulated in a discussion the staff had with an individual from another organization that provided technical support to activists and organizations. These discussions were not exclusively about the Local Correspondents Training, but involved the wider efforts aimed at institutionalization. The person pointed out that Kaos GL was already providing technical support directed at capacity building to other LGBT+ organizations. They asked why Kaos GL was not *naming* these activities as such.

Participant 1: For example, that question widened our horizon. Well, yes, we really are doing that, then why aren't we naming it? And then we started to develop different strategies in areas other than the media school to empower the LGBT movement.

The name for these new activities was formulated as *technical support for LGBT+*

activists and organizations. The naming allowed for diversification of efforts. The support provided within this scope appears in domains such as grant proposal writing, administration, financial resource development, knowledge of local laws, knowledge of human rights law, knowledge of human rights monitoring and reporting, etc. It should be underlined that training is not the only way knowledge is shared in these domains. Knowledge sharing takes several forms. In some cases Kaos GL makes an open call to organizations to participate in training. In this case several people from different LGBT+ organizations would attend an event. In other cases, Kaos GL staff or external experts contracted by Kaos GL would go to specific organizations to provide support tailored to their specific needs. A third form is where Kaos GL staff work with smaller groups. In these last two forms, both training and mentorship/consulting are used as models of knowledge sharing. For instance, the financial staff of Kaos GL would visit different organizations to work with them on budgeting and grant proposal writing. The costs related to these support activities are also covered by Kaos GL under various grants. The mindset behind these activities is explained as follows:

Participant 1: Kaos is concerned with building the capacity of the LGBT movement. But this concern goes something like this: Kaos does give priority to building its own capacity, it wants to become institutionalized. But at the same time it does not want to increase the gap or difference in capacity between itself and other organizations. It wants to grow together and become institutionalized together with other organizations.

Hence, *growing together, becoming institutionalized together and not creating a capacity gap* emerges as a significant principle guiding Kaos GL's work.

The systematic and strategic development of these additional activities outside the Local Correspondents Training did have an effect on the target group. Participant 1: "And so we were thinking that this [the formation of other activities] would help the media school to reach its own target group and it specifically did achieve that."

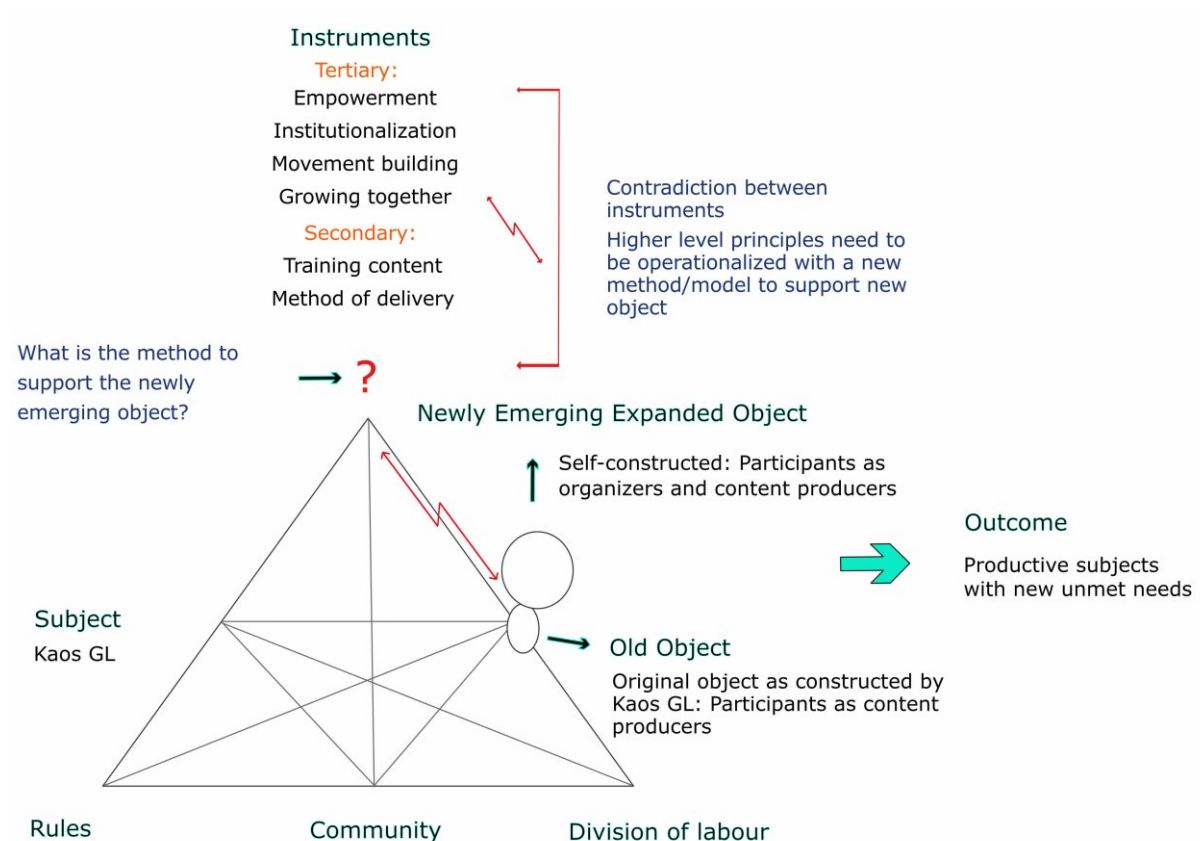
Finding the True Target Group: Interim Analysis I

The leading activity system involved in the foregoing narrative is the Local Correspondents Training. I will call this activity system *training activity*. The elements of the training activity system are graphically represented below in Figure 9. It is important to note that the graphic representation is not a categorization scheme: "the triangle is a unit of analysis which discloses its analytical quality in the process of the analysis, but does not

correspond to the analysis itself.” (Sannino, 2011, p. 578). Therefore, the graphic representation of the triangle is a starting point to unravel the relations in Kaos GL’s training activity at the specific historical juncture reported in the narrative. It is not meant to be the end point of the analysis.

Figure 9

Object Reconstruction in the Training Activity System



Note. The figure shows the Local Correspondents Training Activity System in its historically earlier form. The expanding object requires an additional method, which is not yet present at this time.

In the representation, I have placed Kaos GL staff in the subject position. The general phrase *training activity* refers to what the subjects are doing in relation to the object. The people occupying the subject position are not necessarily my two interview subjects. They are the people to whom reference is made whenever an interview participant refers to past activities and uses phrases such as “we thought” or “we discovered” or “we asked ourselves”.

The perspective, however, is the perspective of the two interview participants in this study.

The participants of Kaos GL's Local Correspondents Training are in the object position of the training activity system. The attention of the subjects is directed towards the object as a problem space. It should also be remembered that it is always the object and not anything else that defines an activity; an activity changes when its object changes (Leont'ev, 1978). According to Engeström (1999b), it is the object that "determines the horizon of possible actions" (p. 381). Of course, the participants of the training are the subjects of their own activity systems, whatever those might be. However even though they are subjects of their own respective activities, in the training activity system, they functionally occupy the object position. Engeström's (2015) distinction between teaching activity and school-going activity is useful in this regard because it points out that although a community of people (such as teachers and students) may occupy the same space at the same time, it does not mean that they theoretically occupy the same activity system in the same way.

It is also critical to remember that an activity system produces things (Engeström, 2015). The Local Correspondents Training is essentially designed as a subject producing activity. The question of what it produces empirically will be examined below.

The elements of rules, community and division of labour are not yet present in this narrative segment. I will be reporting on these in subsequent sections if and as they are brought up by interview participants. This effort to construct the historically earlier activity system is not meant to be an exercise of filling in the blanks in the corners of the triangle. I did not ask participants to specifically talk about their rules or division of labour at this point.

When participants of the Local Correspondents Training enter into new relations, they develop a new quality. They become organizing subjects. The workshops are delivered only several times a year and space is limited, therefore the development is processual. For example, in the very first training workshop held in Ankara, there were 15 participants who traveled from different cities in addition to those who participate from the capital (Kaos GL, 2007; Öztekin, 2007). By 2013, more than 300 people had participated in the Local Correspondents Training workshops (Kaos GL, 2013). It takes a number of years for Kaos GL to recognize the emergence of organizing as a general pattern. Initially, the object of the training activity is constructed as *LGBT+ people as content producers for Kaos GL News Portal*. This is the object as collectively constructed by Kaos GL in 2007 when the training activity first starts. Over time, the conception of the object in this manner proves to be

insufficient. It is important to remember that the object is simultaneously material and ideal (Leont'ev, 1978). This means that “the object of activity has a dual status; it is both a projection of human mind onto the objective world and a projection of the world onto human mind” (Kaptelinin, 2005, p. 5).

The initial construction of the object by Kaos GL staff as content producers does not capture its changing material reality over time. In addition to being both material and ideal, the object of activity is also both something given and something projected; it is processual and in the becoming (Engeström, 1990). The participants change over time. This is not the kind of change one would observe where a new cohort of students proves to be significantly different from earlier cohorts. For example, Virkkunen et al. (2012) point at how the restructuring of the education system by the national government and automatic progression from junior high school to high school lead to a significant change in the profile of incoming students. As a result, there appeared a clash between the old methods of teaching and the new object (the new students).

In the case of Kaos GL, the change that was narrated did not happen in a fashion where a new profile of participant appears in new cohorts. Instead, there was qualitative change over time in the very same people who attended the training. They started organizing. This is an instance of the object of the activity system reconstructing itself. The new object that enters the activity system is now *LGBT+ people as content producers and organizers*. When I say the new object *enters* the system, I am referring to both the material and ideal aspects of the object. There is a *material* reality of participants entering the system by actually taking part in the different workshops over the years as new themes are addressed. These individuals now enter the system with a new material quality, which emerges as a function of their relations with Kaos GL and with each other. At the same time, the object enters the system of the training activity *ideally* because the observed change in old timers is now projected by Kaos GL onto newcomers as content producers *and* organizers in the becoming. There is no fixation by Kaos GL on the earlier ideal construction of the object only as content producers.

When examining the activity system, the relations of the newly emergent object with the instruments need to be examined. There are four higher level principles that have emerged from the present narrative segment: movement building, empowerment, institutionalization, growing together (Figure 9). These function as the hierarchically higher instruments. They are the cross-cutting principles in all of Kaos GL's activities and not just

specific to the Local Correspondents Training. Under Wartofsky's (1979) scheme, these correspond to tertiary artefacts. In Engeström's (2015) interpretation, they are visions or world outlooks. Elsewhere, Engeström (2018) formulates these as *where to artefacts* which provide a vision and direction for the activity. However, each of these principles expressed in this form is an abstract concept that needs to be operationalized in a way that is suitable for the object in the concrete activity system. This is why Engeström (2018) breaks these instruments down into levels and underlines the importance of *how artefacts* to bring the general *where to artefact* to the ground. He views the entirety of mediating instruments not as fragmented elements but rather as one complete instrumentality with different levels that complement one another in their interplay. He stresses that without the higher-order instruments, the lower-level practical instruments have the danger of disintegrating into mere techniques. On the other hand, he also underlines that the hierarchically higher instrument is an abstraction and requires practical instruments to bring the activity system into life. Therefore it is critical that all of the mediating instruments in the activity system, at all levels, complement one another and form a whole in their interplay; they cannot be fragmented (Engeström, 2018).

It should be remembered that instruments are mediating artefacts, produced by human labour and used again in human labour in the broadest sense of the word (Blunden, 2015b). In the respective activity systems, the conceptual instruments work to organize the minds of the subjects. Through them, subjects work on the object to transform it into an outcome. In the narrative segment above, the higher-order instruments of *empowerment*, *institutionalization*, *growing together*, *movement building* all work to organize the minds of the collective. The entry of a changed object into the activity system of the Local Correspondents Training, once it is recognized, leads Kaos GL to diversify the ways in which these abstract higher-level instruments are operationalized.

For Kaos GL staff, it was desirable for the LGBT+ community to organize because an organizing object is fully aligned with the hierarchically higher instrument of empowerment and movement building. The contradiction in the training activity system arises in the relationship between the new object and the lower-level instruments. This contradiction is represented in Figure 9 with the red lightning shaped arrow. The lower-level instruments of the training activity system are the content, methods and approaches used to transform the object into content producers for the news portal. These are the secondary instruments through which the principles are operationalized. They are methods. The reporters training

workshops include sessions on general concepts related to human rights, gender issues, etc. However, the focus is news reporting. For example, homophobic and transphobic news stories published in mainstream media are analyzed, discussed, rewritten in small groups. Journalists from various media outlets are invited to train people on the fundamentals of news reporting. The content of these sessions contradict the new object. More specifically, the content and methods which initially serve to produce organizing subjects are no longer useful instruments to support their organizing efforts. They no longer support the new object. There is also a contradiction between the instruments. The higher-level principles need to be operationalized using new methods. The lack of a new method creates a contradiction.

The outcome of the training activity system at this historical point is thus twofold. On the one hand, it does produce content producing subjects. However, it also produces a new quality in subjects thereby producing a new need.

So far, I have graphically depicted only the training activity system in Figure 9. I will continue to analyze this activity system in subsequent sections. However, in the narrative segment I presented above, my interview participant is actually talking about another activity system, or rather, other activity systems with new objects. I have not graphically depicted these other activity systems because the purpose of this study is to analyse those that are located in the immediate vicinity of the Media School. I did not collect data to look specifically at how the objects of these other systems are constructed or what they produce. Nevertheless, the very general aspects of these other systems as narrated by the participants are important in regards to their interplay with the Media School. Below I present a general overview of these other activities while keeping the focus on the leading activity of the Local Correspondents Training.

The manner in which Kaos GL addresses the contradiction between the new emergent object and lower-level instruments in the training activity system is highly significant. First, the changing object is observed and acknowledged. Second it is questioned and problematized collectively. Third, the input by a third party triggers the process of a new method/model formation to address the question. This is the process of the formation of a new activity. In other words, these narrative segments signal the beginnings of a cycle of expansive learning, starting with questioning, and then a historical analysis of their own activity, an actual empirical analysis of what people are doing, the generation of a germ-cell concept to give direction to the activity, etc. Kaos GL does not respond to the contradiction in the training activity by only looking at the training activity.

Leont'ev's (1978) hierarchy of goal-directed actions and object-oriented activity, which is at the heart of activity theory, is particularly important in looking at this narrative segment. The individual actions of Kaos GL under the Local Correspondents Training do have goals. However, if the attention of Kaos GL had only been focused on the goal, the change in the object could have been overlooked or neglected. They do not dictate the specific form the object should take ideally by focusing on what they want to do. Instead they observe the actual material change in the object over time. When the changing object emerges, they respond with a new model outside the model they already have. The new model is aligned with Kaos GL's higher order principles. However this time, these principles are operationalized in an entirely different way. The principle of empowerment and movement building are now reformulated as *empowerment and movement building through technical support to activists and organizations*. This new formulation is still an abstract concept but it functions differently. In other words, while the principles of movement building and empowerment function as *where to artefacts* that give the activity system a general direction, the new principle *empowerment and movement building through technical support to activists and organizations* is named and now starts to function as a *how artefact*. However, expressed in this form, it is still an instrument operating at a higher level, it is still an abstract concept. At the historical point in which this new concept is articulated and named by Kaos GL, it is still "a simple germ-cell concept of the foundational relations upon which the new practice will be built" (Engeström, 2018, p. 10). The question of how exactly becomes further operationalized in still other instruments. These other instruments are the entirety of the substantive content as well as all the methods and models used to share that content including, among other things, methods of teaching grant proposal writing, methods used to share knowledge of relevant laws, methods used to share knowledge of human rights, etc. These are the how artefacts that anchor the vision downward in practical actions (Engeström, 2018). It is through these that Kaos GL now works on a newly constructed object. In most general terms, the new object of these new activities involves the formulation of *LGBT+ people as organizers* but they are most probably constructed differently within each activity. I have not looked at the specific way in which the new object is constructed by Kaos GL in these other settings for reasons noted above.

To be able to grasp the significance of the actions taken by Kaos GL in this instance, I find it is important to go back to first principles or roots, which give direction to activity theory. As noted earlier, we are substantially concerned with "*real individuals*, their *activity*

and the *material conditions* under which they live, both those which they find already existing and those produced by their activity” (Marx, 1975, as cited in Blunden, 2010, p. 99, emphasis in Blunden). In this instance, the last segment of this quote is especially important. There are already existing conditions when the Local Correspondents Training is first launched. The new conditions are produced over time by both Kaos GL’s activity and the *object activity*. The Local Correspondents are the object of the training activity as well as being the subjects of their own activity systems. The new conditions that emerge from these activities include the emergence of a new quality and a new need.

These first principles give us the foundations to discuss the process of the formation of the new practice. Kaos GL’s new practice of technical support provision to activists and organizations is grounded in *close observation and theorising about both their own ongoing activity and the ongoing object activity*. There is a difference between saying this and saying that the new practice is grounded in *identifying the needs of the participants*. This may appear to be an anomalous interpretation because the object of the activity represents the need (Engeström, 2015). What is the difference, then, between saying that the new practice was created by observing their own activity that of the object, as opposed to saying that it was created by identifying needs of participants? The above excerpts from the participant points at a reflection process focused on activity. It also points at the theorising about what could potentially happen if they did something else. The pitfall in the second formulation about identifying needs is that it begs the question: identifying the needs of participants at what point exactly? This has to do with capturing change over time. Needs might have been identified successfully at a given point in time. Linked to this, the object of the activity might also have been constructed quite successfully at that given point. If the need, as articulated at that point, had been linked to specific goals and no attention had been paid to the changing object, the activity system would have been functioning based on an ideal construction of an object. The ideal construction would have become obsolete at some point. It would have been fixed on the material conditions Kaos GL had found existing at the start but would have lost sight of the new material conditions created by their own activity and the activity of the object.

The method of support to newly organizing subjects first appears outside the training activity system. However, this is not the only change. In 2015, when the Local Correspondents Training is recast under the name the New Media School, a new concept is introduced. Knowledge of social media, methods of managing organizational and individual

social media accounts, digital security, etc. are introduced as new domains to be addressed in the new school. Broadening of the content matter of the workshops in this manner serves as a new method to capture the material reality of the newly emerging object. In other words, when the object is reconstructed by Kaos GL as *organizers and content producers*, the method to support the organizing aspect of participants becomes distributed across several activities. It is included in the training activity system of the Local Correspondents in the form of new content and it is included in other activities as methods and knowledge to support organization.

The foregoing discussion concerns how the true target group was found. My interview participant gave an account of these developments in the context of differentiating between different activities so that the Local Correspondents Training could find its true target group. The question at this point is whether this change by Kaos GL succeeded in addressing the question of finding the true target group? Participant 1 notes: “And so we were thinking that this [the formation of other activities] would help the media school to reach its own target group and it specifically did achieve that.” This excerpt points at the significant contribution of additional activities in helping the media school to reach its target group. However, this is not the only thing that enables it. Additional measures were taken and these will be presented in the next section.

At this point, I should also point out that we are no longer talking about *finding the true target group* per se, but actually *making the target group*. The true target group does not emerge as a group of people with pre-existing qualities. These qualities emerge from the relations of individual people with Kaos GL, with the content of the training, with each other and the methods and models used in the workshops.

Participant Selection

The question of how to choose the participants for the workshops was a concern from the very beginning. The former Local Correspondents Training and the current Media School are fully funded. The number of applications were very high from the start. However the resources for the training were limited. For example, the first two-day training event organized in Ankara in 2007 was limited to 15 people traveling to the capital from other cities in Turkey in addition to some who were participating at the local level.

Participant 1: What criteria are you going to use to choose? That was something that confused us immensely. How are we going to select people? [...] How do you know

you've made the right choice? [...] So when we saw the high level of interest in the applications, we said let's not do this in a centralized way, let's take the school to the local. If we want people to make local news then we shouldn't bring them here, we should go where they are. And then we started to have media schools where we were traveling.

The transition to a localized system of training delivery involved a concern of finances and increasing the number of participants.

Participant 1: So, at first it was centralized training and then we thought we can go to four cities in 16 days. And instead of training 20 people in Ankara—we're doing some math there, calculating finances—we can go to four cities and train 120 reporters with 30 participants in each city.

Financial considerations and effectiveness of the training are also at play in a hypothetical question Kaos GL uses to monitor the effectiveness of their work: instead of spending resources to train people, wouldn't it be more cost-effective and guaranteed if we hired several local correspondents to regularly produce content? This is not a real question and Kaos GL never had the intention to follow this path. However the question is used as a benchmark to monitor the practice.

Participant 1: I find that when you look from the outside, asking this question may appear to be very finance-focused. But on the other hand, it brings dynamism to people who want the media school to continue.

The question is used to energize thinking:

Participant 1: Because otherwise all the institutionalization, it could also bring something else with it, it could lead to inertia, just keep moving in a standard way, don't look back to develop yourself. And that's true for everything. We are doing this and we are spending this much money on it. But is it effective?

The new model of the trainers traveling to other cities starts from the second year of the Local Correspondents Training. In 2008, the workshops are held in two cities. This does not necessarily mean that only people from those cities are allowed to attend. However, it starts to alleviate the burden of selection because more people can participate from the local. For example, in 2008, out of a total of 25 participants in one city, 15 travel from other cities (Sulu, 2008). This model was implemented to include three or four cities each year with wider geographical coverage. In 2016, the workshops were held in seven different cities

(Demirbilek, 2017).

Starting from 2016, Kaos GL starts to organize the workshops in at least two and sometimes three stages. Stage I workshops involve introductory content such as the fundamentals of news reporting, fundamentals of rights-based reporting, etc. The main target group for this stage is newcomers. Therefore not having attended the workshops before becomes one of the central selection criteria. Stage II workshops are meant to be both refresher training and in-depth coverage of content primarily for existing contributors. Stage II workshops are not designed as a fixed program repeated year after year. The content is decided based on emerging needs. The content of Stage II workshops is more advanced and detailed. For example subjects such as interview techniques, digital storytelling are covered in Stage II. The content of Stage II workshops is determined by Kaos GL editorial staff each year based on the needs they identify from the submissions from local correspondents as well as the needs of Kaos GL News Portal.

The two-stage model becomes critical for participant selection.

Participant 1: So then we said, we're going to them but a one-day training is not enough. Actually all this is a learning process. Also it's a process that has to do with the feedback we get from participants. So then we said, okay, let's keep going to other cities, but the selection process [...] let's do that by first meeting people face-to-face, and then let's invite those people to the Stage II workshops.

In this manner Stage I workshops start to become an instrument of selection for the more advanced level for newcomers. However, the target group of the Stage II workshops are not limited to people who have only recently attended the training.

Participant 2: In the second stage we either make an open call, or sometimes we don't, it depends but the main concern there, in Stage II, are people who have already attended Stage I, who are writing for us, who are already contributing or those who have written for us in the past who we believe will be interested in the subject matter of the workshop. Those are the people we accept the most.

From 2007 to 2016 potential participants were asked to send an email to Kaos GL with brief information about themselves and why they wished to participate in the workshops. In 2017, Kaos GL developed an application form to facilitate the selection process. In addition to identification and contact information, candidates are now asked to respond to around ten questions. The questions ask for information about the candidate's

sexual orientation and gender identity (if they choose to respond), any organizations they work with as an activist (if applicable), whether they previously participated in workshops on news reporting/digital media/video activism/photography, whether they participated in workshops about LGBT+ people. The form also asks candidates what they would like to see in a news portal about LGBT+, what kind of content makes them happy, what are the specific things they like about the KaosGL.org portal and what they would like to see there. There is a question asking candidates about the domain in which they would like to produce content for Kaos GL and they are invited to suggest new categories. Finally, the form asks candidates how they plan on sharing what they learned in the training with their friends or organization. The questions reflect the selection criteria for the Stage I workshop:

Participant 2: So, when we're evaluating, we do it based on the things I mentioned and it is important for us that Stage I participants are people who haven't taken part in the training before. It is a plus if they have links to an LGBT+ organization. It is a plus if they have connections to faculties of communication or if they're working in communications. It is a plus if they've written before. And their opinion about KaosGL.org is important for us as well. I mean, if they've noticed some shortcoming there, this is a plus for us. It means we can work with that individual to address that shortcoming.

The form is also important for keeping track of applications: Participant 1: "We preferred it for documentation purposes as well. To see who applies and why they apply. To be able to see that."

Finding the True Target Group: Interim Analysis II

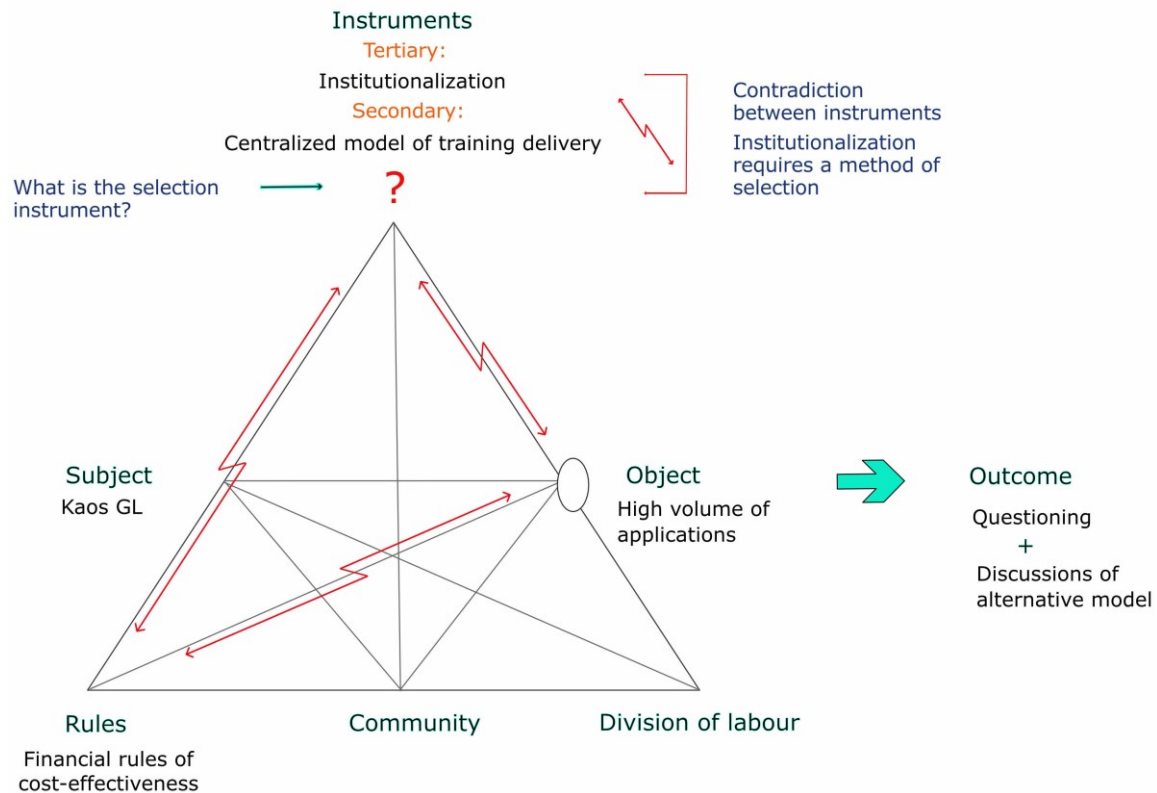
The narrative segments reported above are extremely relevant to the process of model formation or problem solving in the change laboratories (e.g. Engeström, 2007b). It is precisely these types of questions that potentially trigger the process of expansive learning. What do you do in the face of a complex situation that needs to be addressed? In this instance: How do you select participants when there is no ready-made formula for selection that someone can hand over to you? There is no ready-made instrument or model. What is going to mediate the task of selection?

Selection criteria capture an essential feature of what a mediating instrument does. It tells you how to think about the object and facilitates the problem-solving task. It organizes the mind. In this specific goal-directed action of choosing participants, there is a clear

situational task. However there is no helpful instrument to mediate the task of selection. The first stimulus (task) standing before Kaos GL staff is selection. Due to the lack of a ready-made second stimulus in the form of criteria or guidelines, they experience a state of confusion. Virkkunen and Newnham (2013) note:

Vygotsky observed that the resolution of the problematic situation proceeds in two phases. The first phase is characterized by hesitation and search for a second stimulus. It continues until the subject *finds and adopts or constructs* [emphasis added] a second stimulus. The second phase of actuation is characterized by the subject's determined, agentive action. (p. 47)

In the case of Kaos GL, the hesitation is not resolved by *finding* or *adopting* some singular, ready-made selection criteria to serve as second stimulus. It requires *constructing* something new. However the problem is not resolved by constructing one single thing such as a form. In this instance the Kaos GL resort to what Engeström (2018) calls a constellation of instruments (an instrumentality) that “offer the practitioner multiple alternative access points to a task.” (p. 13). To elaborate on these, I turn to the graphic representation of the secondary contradictions in the activity system at this specific historical point (Figure 10).

Figure 10*High Volume of Applications in Training Activity*

Note. The figure shows the Local Correspondents Training activity system in its historically earlier form. The high number of applications requires a new model of delivery and method of selection, which are not yet present at this time.

As shown in Figure 10, the financial rule of cost-effectiveness emerges as a critical mediating factor at this time. There is a contradiction in the relationship between the rule of cost-effectiveness and the object of the activity system, which I have indicated above as *high volume of applications*. The financial rules also contradict the centralized model of delivering the workshops. There is also a dual contradiction in the relationship between the object of activity and the two lower level instruments. First the centralized model of training delivery does not capture the high volume of applications. Second, there is a lack of an instrument for selecting among the high number of applications. Moreover, there is a contradiction between

the instruments themselves. The higher level instrument of institutionalization contradicts the lower level instrument of selection, or rather, the lack of a lower level instrument/method for selection. For Kaos GL, the principle of institutionalization also means giving principled responses to situations. The distress expressed by Participant 1 through questions such as “What criteria are you going to use to choose?” or “How do you know you’ve made the right choice?” point to both the search for an instrument and the need for that instrument to be principled in a manner that aligns with the principle of institutionalization. I find this needs to be underlined because theoretically speaking, in Vygotsky’s experiments, dice throwing is also a second stimulus, where subjects use the method as an instrument in situational decision-making tasks (Sannino, 2015). In the case of Kaos GL at this historical point, we are not looking at the lack of just any instrument, but the lack of an institutional, principled instrument of selection.

If the question of how Kaos GL selects participants is asked in a cursory manner, the selection form appears as the most immediate objectified instrument. It is important but misses the point that multiple methods are developed over time that go beyond the boundaries of the question of selection.

First, developing a model to bring the Local Correspondents Training to the local level alleviates the burden of selection. More people can participate with available resources. Second the two-stage model helps to channel available resources to people who are already producing content. Stage I workshops, in addition to the introductory role they serve, become instrumentalized for participant selection. Third, the questions in the application form organizes the minds of the staff to remind them of what they are looking for. Form questions inquiring whether the applicant is affiliated with any local organizations reflect the nature of the newly constructed object which I discussed in the previous section. The form points to a conscious orientation to select people who are organizing subjects. This is not an exclusively required criteria but it works with the other questions and has embedded with it the understanding that people are more likely to produce content where organized activism is taking place.

Finally, the question of how Kaos GL selects participants can only be understood in view of the new practices I mentioned in the preceding section. They do not just choose participants, they create opportunities for people to choose the activity which is more relevant for their lives. The new model of technical support to activists and organizations reported earlier is itself a method of ensuring that the true target group is reached.

Finding the True Target Group: Concluding Analysis

In this section I will bring together and reframe the two sub-themes addressed under the theme of finding the true target group. In reframing them, I draw on the *law of requisite variety* from cybernetics because it is relevant for making sense of the data presented in this section. I will refer back to this law in other sections throughout this analysis, therefore I find it useful to give a brief explanation here of what it means.

Cybernetics is a transdisciplinary science which was originally associated with physics but which later became appropriated by the biological and social sciences (Ashby, 1956). Among the various central concepts in cybernetics, such as feedback, stability, information, coding, noise, etc., the law of requisite variety predominantly involves the concept of regulation (Ashby, 1956).

In explaining the law of requisite variety within the field of activity theory and expansive learning, Virkkunen and Newnham (2013) use the example of a tennis game. In a tennis game, if a player has mastered only a single stroke, they will not have the ability to respond to all the different ways the ball comes their way. There has to be enough variety in the player's response to be able to accommodate the variety in the movement of the ball: "learning to play tennis is partly about learning to perform a great variety of strokes to control the variety that the other player creates" (Virkkunen & Newnham, 2013, p. 41). However, this does not mean that we are operating with infinite variety. There will be some regularities and connections in the ways in which the ball comes towards a player. From this perspective, learning involves identifying variety, identifying regularities and connections within the variety, and identifying a course of action to accommodate and impact the variety (Marton & Trigwell, 2000, as cited in Virkkunen & Newnham, 2013). By extension, identifying regularities and connections implies the ability to make generalizations. In short, the law of requisite variety states that "the regulator has to have at its disposal a greater variety of different ways of impacting the regulated than the variety of the possible states of the regulated." (Virkkunen & Newnham, 2013, p. 41).

I now go back to the interview data under this section to examine how the law of requisite variety was applied. In the question about selecting the people who attend the workshops, Participant 1 asks: "What criteria are you going to use to choose? That was something that confused us immensely. How are we going to select people?" I will rephrase these questions using the concepts of the law of requisite variety as follows: In a situation

where there appears to be immense variety in the possible states of participants, what regularities do we observe in people that would allow us to make a generalization about which people are more likely to produce content for the news portal? The confusion expressed by my interview participant is perfectly understandable because at the specific historical point at which these questions were being raised, there were no observed regularities in the behaviour of the target group. Therefore no generalizations could be made. When I put it this way, it sounds somewhat awkward because it seems to suggest that Kaos GL staff had no life experience before the reporters training that would allow them to make connections and generalizations. This, of course, is not the case.

Participant 1: For example, at one point we did something, which was an unsuccessful strategy: [we said] let's identify the people we'll accept based on whether they've already created content for the web. That didn't work. And it's also against the logic, against the philosophy of what you're doing. These are people who you're training to be your local Correspondents and if they're already producing content, they don't need you.

The above quote is a generalization based on an assumed regularity. It implies the following: It is more likely that people will produce content for the news portal if they are already producing content for the web. However these types of generalizations prove to be not valid. Moreover, they contradict the higher-level principles which are the *raison d'être* of the training. There were no real regularities enabling Kaos GL to arrive at a generalization strong enough to translate into selection criteria.

When people start organizing in many different cities after their contact with the Local Correspondents Training, Kaos GL is able to observe the regularity and hence make a generalization. Participant 1 notes "So we thought [...] that to produce media content, people need to be organized. And that they can produce content in a space where organized activism is taking place." This emerges as a valid generalization, an example of local theorising after which variety can be introduced into Kaos GL's responses. It is a turning point with a new realization:

Participant 1: The only thing that Kaos was doing for activists was the media school. And naturally, activists or those wanted to become activists who also wanted to have contact with Kaos were obliged to make this contact through the media school.

The above excerpt points at the execution of a single tennis stroke in the face of the multiple

states in which the participants appeared. Developing multiple different strokes is considered:

Participant 1: We thought that if we could provide different options for people who wanted to be in contact with Kaos or for those who wanted to do different kinds of work with Kaos, then the media school would be able to find its own target group.

This is the emergence of variety in response to the variety in the possible states of individuals who wanted to work with Kaos GL. In addition to technical support provision to activists and organizations I presented earlier, today Kaos GL has internship and volunteer work options for people who wish to work in different areas.

Hence, requisite variety is introduced in two ways. First, it is introduced outside the activity system of the Local Correspondents Training. Outside the training activity system, there is a concrete new line of activity for technical support. This is based on an observed regularity. It captures the organizing aspect of local correspondents. Second, requisite variety is introduced within the activity system of the Local Correspondents Training. Within the system, there is still too much variety in potential participants to be able to make definitive generalizations. Therefore, the model of local training delivery and the subsequent model of two-stage delivery captures the irregularity of the object. This basically means that variety is introduced in the model to increase the likelihood of finding the true target group, which has too much variety and no observed regularity. When an online application form is produced in 2017, it is now based on the observed regularities and generalizations in the activity. For example, the question in the form asking whether the applicant is affiliated to any activist organization is a criterion based on a generalization based on an observed regularity. There were no material grounds to ask such a question in 2007 when the training first started. The criteria develop from the material reality of the object activity.

Section 2: Building a Pedagogical Practice

The preceding section focused on the historical development of the organization and model of the Media School, how it is structured, how the organization emerged in response to existing contradictions. The current section is about the development of the pedagogical approach used in the Media School.

Operationalizing the Concept of International Collaboration

The design of the workshops in the early years of the local correspondents training mainly takes the form of presentations made by various people. For example, in the first workshops in 2007, there were eight different people—scholars, human rights activists, journalists—who shared knowledge in their areas of expertise over the course of two days (Gezmiş, 2007). The sessions included topics such as sexism and gender in mainstream media, human rights and the rights-based approach in journalism, the challenges of news reporting, etc.

In these early years, one strategy was to invite people from LGBT+ organizations in other countries to share their experience. International collaborators would assume the role of instructors during the workshops. Kaos GL staff felt obliged to adopt this approach without much reflection because it was advised by donor organizations that were affiliated with different embassies or countries. When international collaborators arrived, they were expected to share their experiences about how they undertake various journalistic activities in their own respective organizations.

However, the involvement of people from countries where LGBT+ rights were more advanced in this form had a demotivating effect on participants of Kaos GL's Local Correspondents Training:

Participant 1: For example someone from a different organization from A [country name removed] would have to come and make a presentation about the media. So, imagine, you only have two days to do your training. And then it doesn't have an empowering effect. Imagine you have some media representative coming in from B [city and country removed] and then they tell people coming from C, D, E, F [names of cities in Turkey removed] "well, when we organize Pride, we have really good relations with the media, and the postal services distribute our flyers for free" and all that. And it only demoralizes

people. Or they say, “well maybe we can do all that fifty years from now”. Those were times when we felt we were somewhat obliged to conform to project texts [donor requirements].

This practice continued for several years before Kaos GL staff realized that it was not working and that it did not necessarily have to be done this way. The donors’ request was not in the form of an imposition that a foreign instructor must be involved. However there was a tacit rule attached to funding in the sense that priority was given to grant applications that fostered international collaboration and knowledge sharing:

Participant 1: Well, it’s not imposed but doing that gives you a plus. For example, if you think about it in terms of an application process [for a grant], it turns into something that makes you more preferable, it turns into a plus.

Sharing knowledge in this specific form was taken as the default model:

Participant 1: In the program of the first two years we just thought that that was the only way they can contribute. So they were coming to train the correspondents. But that project was also supporting the magazine [Kaos GL magazine]. So instead, we could have conducted interviews with those people for the magazine.

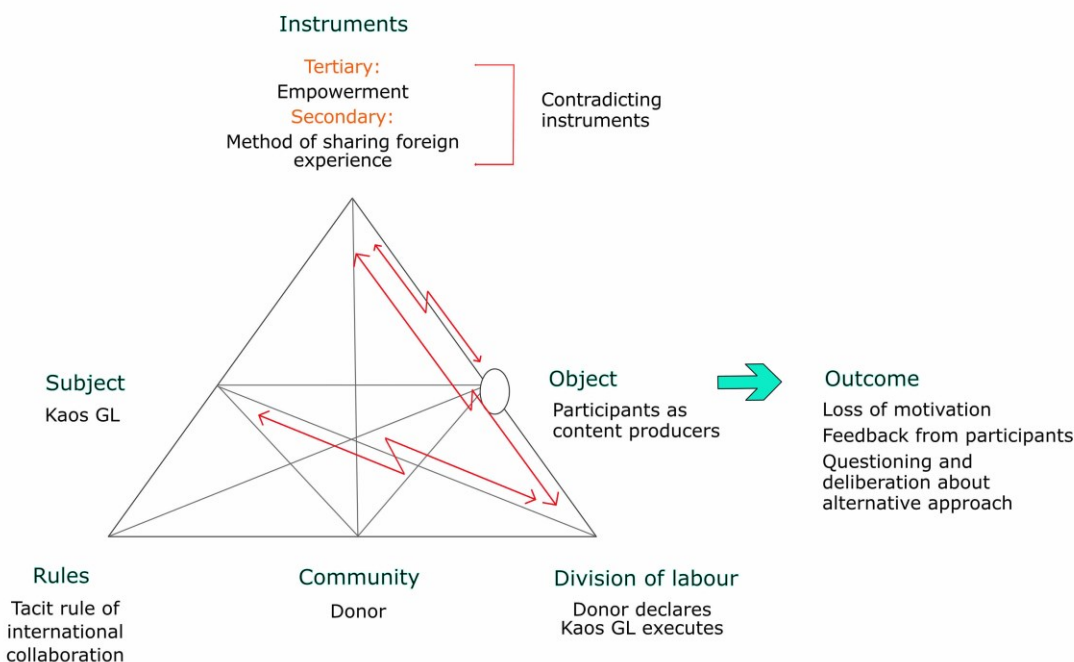
Building a Pedagogical Practice: Interim Analysis I

As depicted in Figure 11, the lower level instrument of the training activity, which is the specific *method of sharing foreign experience*, contradicts the higher principle of empowerment. There is a contradiction between instruments. In addition there is a contradiction between the division of labour and the subject as well as the division of labour and the tertiary instrument of empowerment. The division of labour is about who does what in the community with regard to the object, however it includes both the horizontal division of tasks and the vertical division of power/decision-making (Engeström, 2015). In this example the division of labour articulated by the interview participants in the narrative concerns the vertical division of power, i.e., between the donor and Kaos GL with regard to decision making about a specific issue. The way decision making manifests in the beginning is that the donor declares/advises, Kaos GL accepts/executes. Finally, as depicted in Figure 11, there is a contradiction between the method used in the training and the object of the activity system. The method used for knowledge sharing demoralizes

workshop participants. The method does not capture the reality of the object.

Figure 11

Contradictions in Terms of Method of Sharing Foreign Experience



Note. Historically earlier activity system of the Local Correspondents Training depicting contradictions involving international collaboration.

It is important to underline that there is nothing intrinsically wrong with people sharing stories of successful practices. The analysis of inner contradictions in activity theory requires an examination of the concrete system in its historical development (Engeström & Sannino, 2011). Although sharing of these experiences in this form may be perfectly suitable in other activity systems, in this concrete example it produces an undesirable effect:

Participant 1: We do need this to some extent. For example when there's no publication in Turkey involving LGBT, then we do want someone to come from another country and find answers to questions we can't resolve.

Kaos GL regularly engages in international collaboration where people are either invited as trainers or speakers to events such as the International Meeting Against Homophobia. In the example reported above, it is not specifically the tacit rule of international collaboration that contradicts the object. Rather, it is the default form it takes. The concept of international collaboration can be operationalized in many different ways to serve as an instrument in an activity. It is the specific way of operationalization in this context that causes the contradiction.

In the expansive learning process, Engeström et al. (2005) examine the clashes between and transitions from concepts declared from above and concepts which emerge through experience from below. In activity theory terms, when we speak of a specific principle or a model or method, we are speaking about concepts. A model of international collaboration where a foreign individual comes in to deliver training or make a presentation is, in this instance, an unreflected concept, which is declared from above by default. Kaos GL accepts this at first without much reflection. Starting from the third year of the Reporters Training, they resist the default concept and stop inviting international speakers to the workshops. Foley's (1999) examples about how people in struggle simultaneously resist and accommodate is relevant in this regard. Overall, the idea is that it is not reasonable to look for total resistance or total accommodation in a given situation. When speaking in terms of resistance or accommodation in the face of oppression Foley (1999) does not use the concepts of activity theory. In the context of concepts declared from above and those created from below (Engeström et al., 2005) I am looking at the example in terms of resistance to or accommodation of concepts within the activity system of Kaos GL's Local Correspondents Training. In this example, Kaos GL accommodates the tacit rule of international collaboration but resists the specific form it takes as an instrument:

Participant 1: So when a donor organization advises something, you think, oh okay, that's the way this is done. But in the second and third year, we started to think: should we do this or should we do that. Actually, the feedback of the participants is also very important. For example, if it has an empowering effect on participants you may very well prefer to go with the same format. But then we got feedback from participants that was similar to what we were thinking. [...] But this is... it's not just about you being empowered enough to be able to do it, it's also about your access to resources. You're able to do this more comfortably when you feel strong enough to challenge them.

Kaos GL was able to resolve this contradiction in this instance by reflecting and negotiating with the donor about how to operationalize the tacit rule of international collaboration when they felt strong enough to do so. When this was done, the nature of vertical division of labour was transformed. In this instance, the model of vertical division of labour where the donor advises and Kaos GL executes was changed to a model of *negotiated division of labour*.

Working within the confines of existing explicit or tacit rules and transforming the form they take emerges as a powerful strategy in this narrative segment. The scale at which this effort was made should not draw attention away from its significance as a strategy. When the strategy is scaled up, its power becomes more noticeable. For instance, in 1976 the United States extended the coverage of copyright law to include software programs (Williams, 2010). The free software movement resists proprietary software by employing the General Public License (GPL), which is commonly known as copyleft. The GPL is not a law. It still functions under copyright law but flips it over to protect user freedoms and prevent a software program from being turned into the private property of individuals and corporations if the original work was protected under the license. In his account of the process of development of the GPL, Richard Stallman notes the following:

I had to try to do what could be sustained by the legal system that we're in. In spirit the job was that of legislating the basis for a new society, but since I wasn't a government, I couldn't actually change any laws. I had to try to do this by building on top of the existing legal system, which had not been designed for anything like this. (Williams, 2010, p. 128)

The excerpt above is also an example of accommodating a general rule but resisting the specific form it takes as an instrument in an activity. In the case of the free software movement, a new instrument—a new device—was created in the form of the GPL. In the case of Kaos GL, the default form of international collaboration was transformed and carried outside the immediate training activity.

The definition of a social movement that guides this study was taken from Cox and Nilsen (2014) who argue that a social movement is “*a process in which a specific social group develops a collective project of skilled activities centred on a rationality – a particular way of making sense of and relating to the social world – that tries to change or maintain a dominant*

structure of entrenched needs and capacities, in part or whole.” (p. 57, italics in original). There is no restriction in this definition with regard to the scale or location of a dominant structure of entrenched needs and capacities. Cox and Nilsen do not frame their definition in terms of activity theory. However it is implicit in their definition and their theoretical stance as a whole that changing or maintaining a dominant anything includes changing or maintaining dominant unreflected concepts, wherever they may manifest. Kaos GL’s strategic move in the face of a dominant unreflected concept declared from above is not a pure example of changing or maintaining but rather transforming the rule to meet their own needs. This practice offers a gateway into the possibilities of how social movement actors can expand their immediate sphere of control in circumstances where the wider sphere remains governed by other actors.

Local Trainers, Content and Methods

The problem of what kind of content should be covered in the Local Correspondents Training and who should be delivering it was not something that arose only in the context of international collaborators. Similar issues surfaced with local trainers. In the early years of the Local Correspondents Training, well-known journalists from mainstream media who were reputable in the LGBT+ community were invited to make presentations and share knowledge about their own reporting practices.

Participant 1: When we first launched, this was our strategy. It was like, if we equip people with the knowledge people in mainstream media had, then they would be able to start producing content.

To serve this purpose, a journalist from mainstream media would come and talk about things such as the editorial code in their newspaper or about how they wrote for that newspaper, etc. Participants found it difficult to relate to the stories shared by some of these individuals. The practices they talked about did not resonate with their own lives. Here, the phrase *mainstream media* should not be misleading. The fact that these journalists were from institutionally established media outlets does not imply that their views were mainstream. The invitees were predominantly well-established, seasoned, dissident journalists. Nevertheless, there was a problem of relatability.

While the initial expectation was that participants would become equipped and motivated to produce if they listen to the experience of these journalists, it did not work:

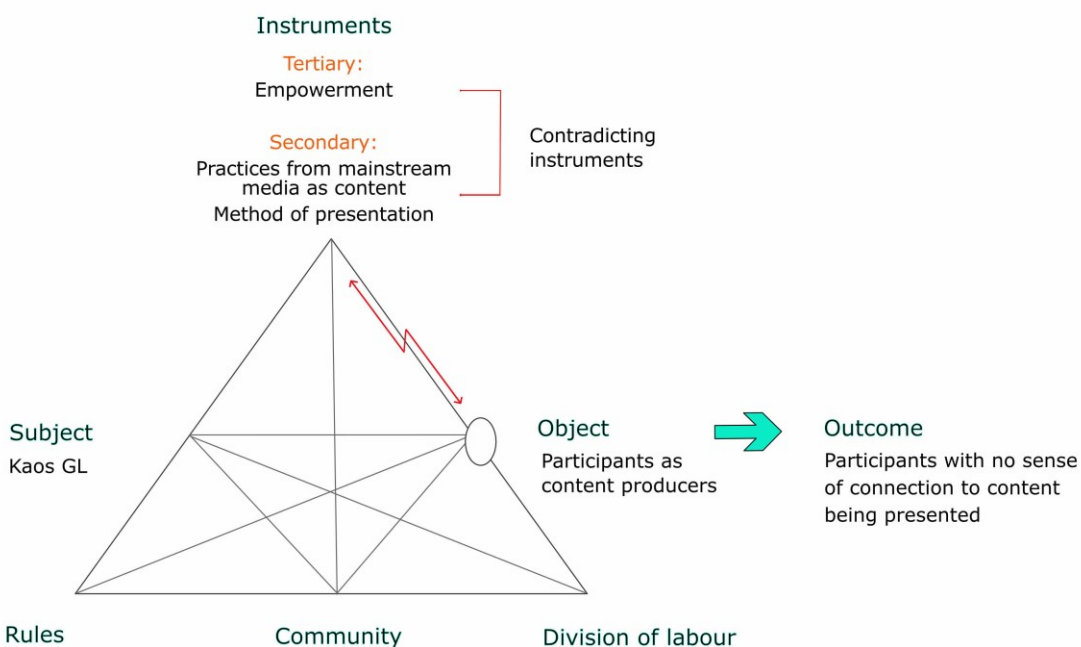
Participant 1: So you expect something to come out of that but actually they start producing when there's application, when they talk to each other. Then they talk more and produce more.

Building a Pedagogical Practice: Interim Analysis II

As depicted in Figure 12, the contradiction in the system occurs, once again, between the lower level instruments and the object, as well as within the instruments themselves. The professional activities of seasoned journalists who present stories from established media organizations do not resonate with the participants. The content is not empowering. In addition, the method in which these are delivered does not induce participants to produce their own work.

Figure 12

Contradictions in Terms of Method of Sharing Local Experience



Note. Historically earlier activity system of the Local Correspondents Training depicting contradictions involving training content and method with established local journalists.

As different instructors were invited, Kaos GL began to recognize that some approaches worked better than others. Moreover, some instructors were more relatable than others. There was a turning point when one of the early participants of the Local Correspondents Training started to work as a professional journalist. This individual had taken part in Kaos GL's workshops, had become an active contributor to the news portal and then had started to work as a professional journalist. Kaos GL invited this person as a trainer to one of the workshops. This was a significant event because the trainer was now someone who was once in the position of the trainees. Participants saw him as a peer rather than as someone with stories from a distant world.

In this instance, practical application was also incorporated into the workshops. However it did not function by itself to make the training successful. For example, when reflecting on the experience with the new trainer, who was a former participant of the Local Correspondents Training, Participant 1 notes:

For example he talked about how newspapers first appeared in the world, and then about journalism in Turkey. Normally, this kind of presentation is something I'm against in theory—so much historical information. But he presented it in such an engaging manner, the correspondents just loved it.

The new trainer became a long-term collaborator of Kaos GL and continues to work in new iterations of the workshops each year.

In this narrative segment, once again, the regularities that were necessary to be able to develop a strategy started to emerge over time. As these were observed, the necessary generalizations were made. Based on the interview data, the first generalization made by Kaos GL is: *participants become engaged and start producing when they apply what they learn*; the second is: *participants start producing when they talk to one another*; and the third is: *participants engage and become productive when they relate to the trainer, which is easier if they see the trainer as a peer*. Kaos GL started to change the pedagogical approach in the workshops as a result of the observed regularities and derived generalizations.

Participant 1: So the process of content production went much better with him. Also, after A did this [name of instructor removed], we started to make sure that a part of the training was completely practical. And people would have one article published on the web portal before they left the training, or at least they should have produced content that

will be published on the portal. This is what we expect now. For example, these are all things that developed in the process.

The examples I have reported about the format of the workshops in the early years may incorrectly give the impression that there were only presentations and no practical application at all. In fact, after the first few years, practical sessions were included in the workshops. However they were of a different nature:

Participant 1: And also when social media wasn't that widespread in the beginning of the 2000s—it wasn't used that actively—our point of departure was different. We would read newspapers. We read homophobic news reports together and rewrote them. Because at the time that's what Kaos understood from news reporting. When we first started [...] the way we expressed ourselves was...we rewrite and publish homophobic and transphobic news stories after cleansing them of their homophobia and transphobia. It took two or three years to learn that as well. So for example, let's say you have a news story saying 'a transvestite named Arzu [hypothetical name] was murdered in Antalya, and you also have the given name BA [hypothetically used real name removed] in parenthesis in newspaper C [name of newspaper removed]. So [...], because we had learned not to use the word transvestite—we would say, "well the correct sentence here should be..." so we cross out the word *transvestite* and write *transgender woman Arzu*. But then we would leave the other name BA [name removed] and say that they were murdered.

So, there's a process where we were actually learning the things that we were teaching other people. In that process, I think the biggest contribution of the media schools was that they were learning occasions for us more than they were for the correspondents. So in a way, we learned about Internet news reporting and then everything aimed at teaching other people actually developed later in the process.

There are two aspects I find important here. First, the notion of practical application was actually there from the beginning in embryonic form in the workshop exercises. The specific form it took matured over time as Kaos GL observed it being modeled by other people and as they reflected on alternative approaches. Second, the process of learning by Kaos GL is significant. The activity system is producing not just subjects for the news portal but also

subjects for the training activity itself. Kaos GL staff are transformed in the process of participation in workshops as facilitators.

In 2015, a concept level change was introduced. The Local Correspondents Training was recast under the new name: The New Media School.

Participant 2: At first we called it the New Media School. Why, because we wanted to go beyond the correspondents training and do something that involved web-based publishing, social media, free speech on the web and things like that. That's how we kicked-off in 2015. [...] And when we launched we talked about the need to have something more structured, something to help them build their skills.

In other words, the 2015 concept-level changes are not just about content, they are also about structure. On the one hand, in addition to fundamentals of news reporting and rights-based journalism, they now cover knowledge and skills aimed at web publishing and social media. On the other hand, they are structured to allow participants to build such knowledge and skills.

Participant 1 notes: "Before that it was a little mix of everything. It later became differentiated."

Today, all the workshops are designed to include practical application. Kaos GL staff use this approach when they are the instructors themselves, primarily in Stage I workshops with newcomers. In addition, external instructors are also asked to design the training with practical components, whether they are training in Stage I or Stage II:

Participant 2: So, whoever the trainer is, we want them to not just lecture and leave it at that, but to make it practical. And we want people to write news stories as much as they can. For example, in workshops where I'm the trainer, what I do is—for example if it's about fundamentals of news reporting—I speak very briefly in the beginning. What's important for me at that point is to only tell them that a news report is different from an opinion piece or an essay in that it uses an inverted pyramid and conforms to the rule of 5Ws and 1H. I try to explain this very briefly, very briefly, in ten minutes. Right after that, I use these problematic news reports from the media that I print out. I hand those out and I ask: how would you rewrite this. It's fictional, you can ask for a statement, you can make it up, write this story. They rewrite it and then as we're discussing it, I explain the principles of rights-based journalism. Because otherwise, explaining the principles of rights-based journalism for half an hour is very boring for people. But when they're

discussing it and asking “oh, should I have used this other concept”, “I should have handed the microphone over to them” or “How can I write a news report without using victimizing discourse” and all that, they can find answers to a whole range of questions in this way.

The new approach allowed Kaos GL to resolve the contradiction between the instrument and the object. In other words, the method of practical application and a model of training that allowed interaction between participants now aligns with the object of the activity system. Moreover, the contradiction between the higher-level instrument of empowerment and the lower-level method is also resolved.

Above, I noted that the new model now aligns with the object of the activity system. In fact, this needs to be rephrased. In expansive learning, the critical aspect is to follow the object and see if there is any transformation in it (Engeström, 2015). This means we need to understand how Kaos GL constructs the object (participants of training) using the new instrument. The narrative segments reported above show that the object is now constructed differently. Participants of the training are now constructed as content producers during the training as well as after. Therefore the narrative segments I reported here also show another aspect of how the object was constructed in the early years. While the construction of the object in the early years is predominantly *participants as future content producers*, it is now constructed as *participants as content producers in the now*. Another way to express this change in object could be as follows. Previously the object was *participants as people who acquire knowledge during the training*. Today, the object is *participants as people who create knowledge during the training*. The transformation of the object from a position of knowledge consumer to knowledge producer during the training is testimony to object expansion. However, this is a distinct type of expansion which is explained by a concept Engeström et al. (2003) call temporal expansion. The producer aspect of workshop participants is temporally expanded into the present.

Engeström et al. (2003) examine the ways in which objects in various domains of practice expand both spatially and temporally in an activity. The examples they draw on are from economic crime investigation, organic farming and medical care. For instance, they examine how economic crime has spatially and temporally expanded into a messy object while the instruments used by investigators such as models of work, methods of analysis are unable to

capture its changing spatial and temporal reality. They argue that “objects do not appear, take shape, and become stabilized without instrumentalities.” (Engeström et al., 2003, p. 181). In the case of Kaos GL, it is precisely the new pedagogical approach that serves as the instrument to shape the object and allow it to temporally expand into the present as a producer in the now.

So far, I have discussed aspects of the training relevant to the first two generalizations that were made by Kaos GL. These were about people being productive when they applied what they learned and when they were interacting with one another. The discussion above was about what actions were taken once these generalizations were made. The third generalization Kaos GL made was about participants being able to engage and become productive when they related to the trainer. The generalized proposition concerning the relatability of trainers was not addressed in the same way as the first two generalizations. While new trainers can be asked to use the new method of practical application in workshops, a different approach needs to be taken to ensure that the trainers are relatable. However, this is difficult because there is no list of criteria that can be definitively applied to measure the relatability of a trainer. It is not necessarily age, not necessarily their sexual orientation or gender identity that makes them relatable. For example, in a different context when talking about a foreign visiting delegation that they met, Participant 1 noted that the delegation was composed of people in their 60s and 70s. However:

Participant 1: For example there, it was much more...for example, if it had been younger people or our peers, we wouldn't have been able to establish that kind of dialogue.

Because they had gone through similar things in the 70s and 80s. They had experienced what we are experiencing now. So they understand, they understand what we need. They understand that even if we need something, we wouldn't be comfortable expressing it. So these kinds of things, you are able to experience much better with them.

The generalization about relatability is addressed by Kaos GL primarily by maintaining long-term relations with those trainers who are able to make a better connection with participants. They are invited back year after year. In this manner, the Media School starts to build its own expertise.

The way in which the contradictions were resolved in this section is noteworthy because it is an instantiation of the activity system producing its own solutions. I had noted earlier that the training activity system is primarily a subject-producing activity. Participants become content

producers and then occupy the functional position of subjects in the publishing activity system as they write. In the example above, the training activity system produces subjects not just for the publishing activity but also for the training activity itself. Whenever the new trainer is performing the goal-directed action of training, he is in the subject position of the activity system. Since the elements are functional constituents, when Kaos GL staff are in the subject position either observing or planning, the trainer functions as an instrument. In other words, Kaos GL staff mediate their activity through the new trainer who embodies a model aligned with the needs of the participants.

Hence, the historically earlier problems raised by my interview participant about incompatibility between trainers and participants, incompatibility between methods and participants are resolved in two ways. First, people who are better able to serve the function are retained. Second, and again, the activity system produces its own solution. The contradiction is partially resolved through the new material conditions Kaos GL staff create with their new activity and not just the material conditions that existed prior to their activity. Finally, Kaos GL staff are transformed as subjects of the activity system. Engagement in the planning, design, delivery, evaluation and critique of their own activity empowers and transforms them as subjects.

There is nothing in the interview data to suggest the existence of problems related to this new model. It appears to work well. For example, in a more recent Stage II workshop, Kaos GL editorial staff decided to include storytelling in order to equip writers with the skills they need to be columnists. The three-day workshop was designed as follows:

Participant 2: So we invited storytellers, that's what we did. So N came [name of author removed]. She explained...that's how we had arranged it, on the first day N came and she talked about how she wrote...how do you write a story, how do you compose a column. On the second day L [name removed] talked about how you can add visuals to what you wrote. On the third day, a digital communications person talked about how they can publish their articles and visuals on a blog. He talked about how to make a blog. And at the end of the day, everyone had their own blog with the stories they had written and the visuals they had designed. At the very end, we read those stories to each other. And there were incredibly brilliant things that came out of that. So sometimes we go crazy and do things like that.

Moreover, over time the Media School begins to organize workshops for other organizations.

Participant 2: So what happened there was that we started getting requests from other places, asking us to do the workshops with them. [...] On one occasion E [name of organization removed] asked us to organize a media school [...] attended by transgender women sex workers. So really, for example, that was a great experience for me [...]. I learned immensely. For example there I had to use other tactics. I learned more than they did. So while the people who take part in [our workshops] are university students and the like, with transgender women sex workers we started to have them write news reports based on stories at the hairdresser. And things like what it's like to go out on the street. And the headlines they had...for example *They don't write about us when we're alive, then they mention us in two lines when we're dead, My life is not just about violence, The hairdresser is just an excuse, it's all about the conversation, This is my story...* So for example on that occasion, I had them play a 5W1H game. [...] On that occasion, it wasn't about having them rewrite a news story. They wrote about their own experience from scratch and put their own headlines, like *We want a sex workers union*. So things like this actually serve us. They help us find an answer to the question of how we can revise this knowledge for audiences other than our own.

Hence, The Media School's pedagogical practice starts to become more diversified as questions arise about how it can be extended to address the needs of other groups.

Beyond Content: Socialization as a Pedagogical Principle

Over the course of several years after the workshops started, Kaos GL staff also realized that the primary need of many people who were attending these events was not to get information about how to write news. People participated to socialize with the community. Access to knowledge was also a need for them but it was not necessarily and not always the primary need. The reporters training served as a space for socialization for the community. Participant 1 notes: "it took us two years to realize that we were providing that space."

Once Kaos GL began to recognize that motivation to produce is built when people are in conversation with one another, they started to deliberately design the events in a more flexible manner to give people more space and time to socialize. Instead of filling the program with one

presentation after another, they started to introduce longer breaks, lunches, dinners and evening parties. The morning sessions would be started a little later if there was a party the night before. This was especially important because for many participants the local correspondents training was the first time in their lives that they had the opportunity to meet other LGBT+ people.

In its current form, the Media School pays much closer attention to creating these times and spaces for socializing. Participant 2 notes that for LGBT+ “the first step is to socialize to be able to write. To come together, to have a good time.” For example, one of the most productive training events in recent years was when a Stage II Media School workshop was organized in a coastal town. It was a time when the government had banned Pride events. But participants had the chance to swim together with rainbow flags and to hold a Pride March during the breaks. They took photos during these events, produced a news story about their own activism and published it in Kaos GL News Portal. This was a statement.

Participant 2: We marched and we are everywhere. And all of a sudden the boundary between news writing and activism starts to blur. It was very enjoyable. It was one of the most productive events we had. And we are still in contact with the people who attended that event. Even if they don't write something they call and say this or that happened or I have an idea, do you think I should do this, or would you be interested in doing this. Loading people with as much information as possible is not what motivates them; it is making sure that they leave with a memory.

Building a Pedagogical Practice: Interim Analysis III

Space for socialization emerges as a significant instrument in these accounts. The highest level mediating principle of empowerment is brought down to ground with the concept of socialization. In other words, *empowerment* now means *empowerment through socialization*. When expressed in this form, the concept of socialization is still abstract. However it is first recognized and named before it is further operationalized. Before the concept is acknowledged, there is a lack of a secondary instrument to capture the material reality of the object. In this case, the lack of a principle and the lack of a method for operationalization contradicts the material reality of the object. Kaos GL start to recognize that although they are not deliberately designing the training with the principle of socialization in mind, the participants start to use the available spaces for that purpose. Socialization thus becomes the guiding principle in the entire design of

the workshops. The contradiction between the object (socializing participants) and the lack of an instrument is thus resolved.

In preceding sections, I have reported on the secondary contradictions of the training activity system and the ways in which they were resolved. In the next section, I will make a concluding analysis of the data already presented.

Building a Pedagogical Practice: Concluding Analysis

In light of the above, is it possible to argue that the development of the new pedagogical model is an authentic practice that was produced by the practitioners to meet local needs? And is it possible to argue that an expansive learning cycle has been completed?

First and foremost, I will argue that the new pedagogical practice is authentically produced. It takes form over the years based on observation, feedback, trial and error, careful deliberation as well as practical activity. The generalizations that are made are not exported from outside. Instead, generalizations are made based on regularities that emerge and are observed in the activity. In addition, unreflected default concepts declared from above are resisted and transformed. The solutions address the real contradictions within the activity system of the Local Correspondents Training. The new approach becomes embodied in the subjects produced by the activity such as Kaos GL staff and the external trainers who were once learners. These people start modeling the new approach. For all practical purposes, this is an authentic practice.

Beyond practical purposes, can we argue that the creation of the new pedagogical approach qualifies as expansive learning? In other words, do we have a complete expansive learning cycle to allow us to say that a new practice has been created from a theoretical perspective beyond the practical perspective I mentioned above? To be able to say this, there is still one requirement that needs to be addressed. This has to do with the notion of *objectification*, which is highly relevant for the interview data presented in this section. Below, I will explain both the meaning of objectification in terms of activity theory as well as its implications in practice. While discussing the implications, I will draw on additional interview data.

What is Objectification? Objectification is the act of giving “permanence and substance to a concept” (Blunden, 2012, p. 297). In the very beginning of the literature review to this study, I had cited Engeström and Sannino (2010) who note that in expansive learning “the learners

construct a new object and concept for their collective activity, and implement this new object and concept in practice” (p. 2). In this case, a discussion of objectification should take place in its relationship to a concept. (Objectification does not have anything to do with the object of the activity system. They are different theoretical concepts.) The pedagogical approach developed by Kaos GL in the Media School is a concept from below, or more correctly, it is a system of concepts. Drawing on the works of Hegel and Vygotsky, Blunden (2012) writes:

Concepts always arise from some kind of predicament, sometimes indicated by the problem (e.g. sexism) and sometimes by the solution (e.g. freeway). A concept arises along with a word coined for it, at some cultural and historical conjuncture, within some social practice, in which the problem suddenly becomes the focus of action. (p. 280)

The foregoing points to the origins of a concept and its objectification in a word. Blunden (2012) continues:

“Predicaments” give rise to concepts because they are contradictions and demand an innovation in the relevant system of social practice. This innovation is manifested in the introduction of a new word, or the investment of new meaning in an old word and a modification in the normative practices of that institution. (p. 281)

Elaborating further on the relationship between a concept and objectification he writes:

When a situation or predicament arises historically, and a word is coined for the situation, very often the response to the predicament also entails the creation of an artefact as well as a related system of practice in order to resolve the situation. In the case of “freeway”, we not only created the concept of “freeway”, we built material freeways from concrete and bitumen, and we also instituted laws and regulations to entrench the practice. Once the word “sexism” was created a whole literature on the topic was created and a range of anti-discrimination laws put into legislation, as well as instituting a range of social practices to oppose it. The creation of artefacts realising a concept, including technology, images, regulations, laws and literature, secures the place of a concept in our lives. This way, a concept will never be completely forgotten or misconstrued, and some stability is given to the concept. The continued use of material realisations of a concept in social practices institutionalises the concept and consolidates it. (Blunden, 2012, p. 282)

These words reveal both the meaning and the significance of objectification as a means to ensure the realization, permanence, stability, consolidation, substantiation and institutionalization of a concept, because “it is only thanks to such objectification that human communities pass on their wisdom generation after generation” (Blunden, 2012, p. 297). However, he also underlines that the specific form objectification takes may vary:

One of the most important forms of objectification is the creation of texts, by which I mean everything from government regulation to advertising, literature and everyday speech. But every kind of objectification gives permanence and substance to a concept. When we take our idea of the good life and erect a building in line with that ideal, people will be living with that idea of the good life for long after. Ideas of learning are objectified in the design of schools and classrooms. (Blunden, 2012, p. 297)

Objectification is a highly significant step in the Change Laboratory method I discussed in the beginning of this study (Virkkunen & Newnham, 2013). In this case, people who take part in a Change Laboratory need to objectify the new practice that they have designed so that it can be consolidated and generalized and passed on to others. The authors elaborate on this process:

Consolidation and generalization takes place at three levels: firstly, on the level of organizational decisions concerning new rules, organizational arrangements, and implementation and use of tools; secondly, on the level of crystallizing the new concept or concepts that the practical reforms reflect, and thirdly, on the level of terminology. In many cases the act of consolidation means to explicate and summarize the new model in a written document that is used as the substantiation of the management’s decisions concerning the adoption of the new model and the related decisions concerning new rules, organizational arrangements and tools. It is also used for informing and instructing those, who have not been involved in the Change Laboratory about the new model and its application (Pihlaja, 2005, pp. 209-231; Kerosuo, 2008). Although creating the document can be a one-time effort, it could well also be a living and developing objectification of the collective learning. (Virkkunen & Newnham, 2013, pp. 103, 104)

Based on the foregoing the idea, then, is that if we are speaking of a specific pedagogical model locally developed and used in the Media School, this is a concept. The concept of the new pedagogical approach is literally a solution to a local problem. Following Blunden (2012), we

can observe that the concept of the specific pedagogical approaches arose as a solution to a predicament that was being experienced. The predicament involved multiple contradictions in the activity system of the Media School, which I reported above. The concept now needs to be objectified using appropriate terminology as well as additional explanatory documentations, representations, etc. First and foremost, it needs a word or a system of words to capture the concept or the system of concepts.

Illustrations of Objectification by Naming. Throughout the interviews, the participants shared their generalizations and the resulting changes they introduced to the pedagogical practice of the Media School. However the words *pedagogy* or *instructional design* were not used once. This hides the fact that Kaos GL is doing more than they are actually naming. It also hides the fact that the institutional development of the Media School, in terms of pedagogy, is actually more significant than what is expressed with the words they use. For example, Participant 1 commented on the process in which newspaper articles used to be collectively analyzed and evaluated during the training in the early years of the training. They never referred to Bloom's Taxonomy or said that they were formerly focused on the levels of *understanding*, *analysing* and *evaluating* whereas today they are aiming for the highest level of *producing new or original work* during the workshops (for Bloom's Taxonomy see, Armstrong, 2020). Yet, the interview data clearly show this progression.

Again, participants never used Freire's (2000) concepts by explaining that they abandoned *the banking model of education* in favour of a *problem-posing education* where individuals can become *critical thinkers* in a process of *consciousness-raising*. Yet, this is evident in the historical development. It is observable in Kaos GL's transition from the assumed generalization that people will start producing if they are presented with the knowledge held by well-established journalists towards the observed generalization that they produce better when they are in discussion with one another. It is present in the workshops where people are invited to first recreate a news story and later review it critically in light of the new conceptual tools offered to them, such as the conceptual tools of rights-based journalism, refraining from victimising discourse, etc. In addition, *critical thinking* and *consciousness-raising* are present in the overall approach of the Media School. For instance,

Participant 2: We have a media monitoring report that comes out every year. There's

substantial data in there about discriminatory discourse and hate speech. So, for correspondents to acquire those skills—that’s also important in news reporting because the news story you’re offering as an alternative to mainstream media is fundamentally based on a critique of its discriminatory discourse. And you can produce new news to the extent that you are able to recognize that.

When Participant 2 was discussing how they “had to use other tactics” during the training with transgender women sex workers, they stated: “For example there, it wasn’t about having them rewrite a news story. They wrote about their own experience from scratch and put their own headlines, like *We want a sex workers union...*” There is no mention here of Freire’s (2000) concept that “problem-posing theory and practice take the people’s historicity as their starting point” (p. 84). This concept is described by the participant with the words “other tactics”, yet it is there as a concept, solidly grounded in the practice. This example also lucidly illustrates what Blunden (2012) means when he ultimately argues that a concept is an activity. It *is* an activity. The concept is there in Kaos GL’s practice without the words attached to it.

In the same context of the training organized for transgender women, Participant 2 explains: “So really, for example, that was an excellent experience for me. I learned immensely. [...] I learned more than they did”. Again, this is a manifestation of Freire’s (2000) call to address the teacher-student contradiction: “education must begin with the solution of the teacher-student contradiction, by reconciling the poles of the contradiction so that both are simultaneously teachers and students” (p. 72). Again, when Participant 1 reports on why they decided to stop inviting international guests to function as trainers during the workshops, they note that this had a demoralizing effect on people and that it was not empowering. They never refer to Freire’s (2014) concept of *pedagogy of hope* but the practice is there.

There are still other terms that can be used to describe the specific instructional approaches that are being used in the Media School, such as the use of scaffolding by Participant 2 in the presentation of news reporting and rights-based journalism or guided inquiry approaches, etc. However, the examples above are not meant to be an exercise of matching the actual practices with the concepts used for them in different pedagogies. I have included them to illustrate that words such as *participation* or *applying what you learn* or *interacting with others* only partially capture the nature of the work done in the Media School. The actual pedagogical

practice is bigger than the words that are being used to describe it. It needs to be translated into the appropriate terminology.

I should now take a step back to underline that this study is not about pedagogical practice. It is about the expansive learning process of the Media School. The foregoing discussion about pedagogy arose in the context of objectification, which is an inseparable part of expansive learning (Virkkunen & Newnham, 2013). I will address objectification again when discussing the process of how Kaos GL produced publishing principles for the news portal. At this stage, the salient point is that naming the pedagogical practice of the Media School will help to consolidate and institutionalize it. It will allow Kaos GL to situate the practice within a wider pedagogical approach under which more diverse and specific instructional strategies can be used, developed, named, described and expressed in written and graphic form to be shared with others. The naming and elaboration of the wider pedagogical approach will also help to name and elaborate the specific instructional strategies beneath it. It will help align the wider approach with the specific strategy.

The importance of naming was brought up by Participant 1 when they were reporting about a colleague who invited them to name the work Kaos GL was already doing as technical support for activists and organizations. This opened up an entirely new discussion. It was a step towards objectification and institutionalization of another new practice. On that occasion they were giving a name to what they were already doing. The same would be applicable in the case of the pedagogical practice.

For instance Engeström (2014) points out:

In some cases, collective concept formation seems indeed to move with the name of the concept in the lead, as if in search for contents for the name. In other cases, concept formation seems to move practically in the opposite order, with the embodied and enacted novel practice in the lead, but not having a name for it. The name may be attached to this novel practice only much later. (p. 237)

It appears that the locally produced novel pedagogical practice of the Media School still awaits a name.

Implications of Objectification. So far, I have talked about objectification as a theoretical requirement in expansive learning. However, I have not pointed at any interview data indicating that this is needed by Kaos GL. The next question is, what are the empirical grounds in the data that point to a need for objectification?

The issue is that there are no problems when the pedagogical approach is being used to guide instructional strategy. Problems start to arise when it is not being used, which is the whole point of objectification. I turn now to a narrative segment involving the way in which the approach is shared with external instructors:

Participant 2: So, for instance, usually if it's someone we're already in contact with, we're much more comfortable working with them. And what I do is I have a meeting with them and I tell them about our participants, who they are, what kind of people they are, what they should pay attention to when working with LGBT+, and what they should do to engage people.

In an interaction with an external instructor in the past, there were some disturbances in how the information shared in these meetings was translated into practice. Participant 2 mentions two factors. One is about the lack of preparation for the workshop. The other is about how the notion of *participation* was understood. I will address the issue of ill-preparedness in subsequent sections. First, I focus on the notion of participation.

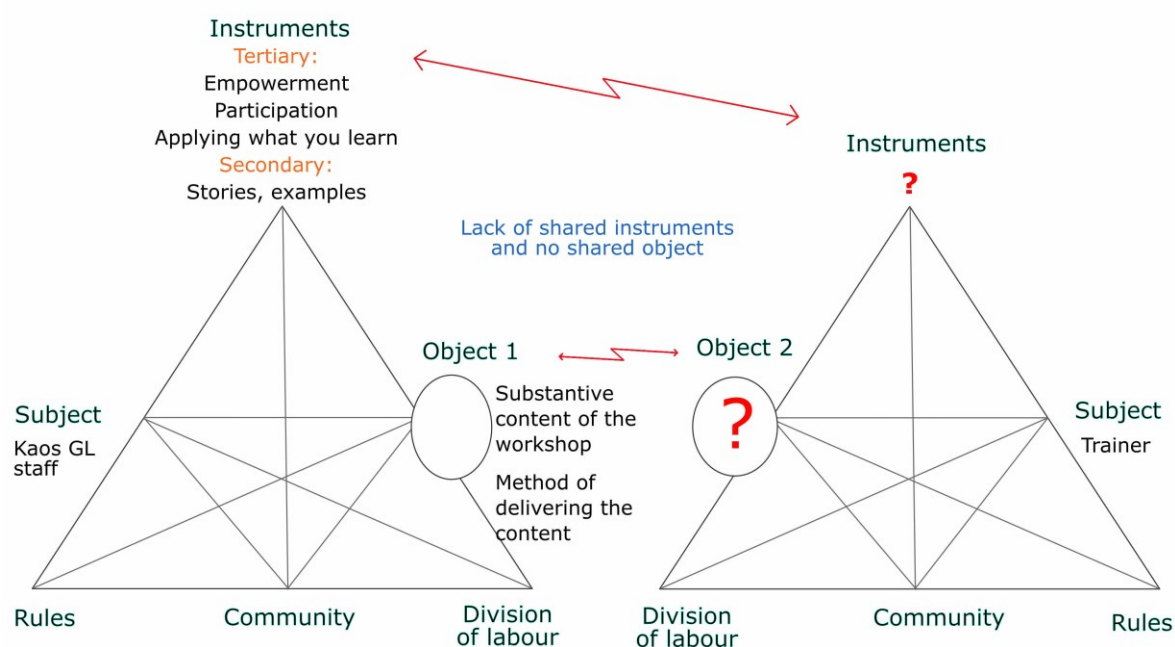
Participant 2: We told them to give the floor to people so that it would be more participatory. But they understood participation in such a wrong way. [...] They just asked questions. And it was just total craziness all around. Nothing came out of it, nothing.

The description of what happened during the actual training pertains to the training activity system. However, the encounter Kaos GL staff has with the external trainer prior to the training is theoretically located in another activity system. It belongs to that group which Engeström (2015) calls *instrument producing activity systems*. The object of this activity system is not the workshop participants anymore. Instead the object is the content matter of the upcoming workshop and the methods that will be used to deliver that content (Figure 13). The staff member and the external trainer are having a discussion about the instruments that will be produced and used in the training activity system. In other words, the instrument producing activity system will

literally produce the content and the instructional strategies which will be transferred to the training activity system of the Media School.

Figure 13

The Interaction of Two Instrument Producing Activity Systems



Note. The figure depicts the relationship between the instrument producing activity systems of Kaos GL and an external instructor interacting with one another in the process of preparing for the workshops.

The instrument producing activity system of the Media School also has its own instruments. Just as we use physical tools to produce other physical tools, there will be conceptual tools to produce other conceptual tools. For Kaos GL, these conceptual tools include the principles guiding the process of instrument production as well as secondary instruments

such as specific instructional strategies. For example, empowerment, as an unchanging principle in all of Kaos GL's activities is still there at the higher level as a tertiary instrument. In addition, there are those generalizations that I mentioned earlier. These generalizations function as principles. The generalization that people learn better when they interact with one another, the generalization that they become productive if they apply what they are learning are present in the instrument producing activity. In the excerpt above, Participant 2 summarizes these generalizations with the abstract concept of *participation*. The principle of *participation* hence guides the process of instrument production for Kaos GL together with the principle of *applying what you learn* (Figure 13).

The secondary instruments Kaos GL uses, which are the actual models and methods for instrument production, are already internalized by Kaos GL staff. The people embody the method. When the method is shared, it is shared in the form of stories and examples. In other words, the higher principles such as *applying what one learns*, and *participation* are not objectified using specific terminology or documentation. They are objectified in speech. While the method is not objectified, the content matter is. In other words, the actual material such as news reports and other content from Kaos GL news portal are shared with the trainer and they are asked to build a critique of these materials. They are then asked to design the workshop. In other words, the trainer is expected to walk workshop participants through the process of critique. The best practices about how to do this are shared in speech in the form of stories and examples.

In Figure 13, I have depicted Kaos GL staff and the external trainer as occupying the subject position in their own activity systems. The instruments used by Kaos GL staff to mediate the process of producing new educational content and method are shown in the figure. We have no access to the instruments used by the external trainer to mediate the process because they were not interviewed for this study. Therefore, there is a question mark in the instruments element. Again, because of unknown instruments we do not know how the external trainer constructs the object of the activity system. For Kaos GL, the object of the activity system in this particular example is a) the substantive content of the workshop and b) the method of delivering the content. Despite the question marks in Figure 13, we know empirically that there is a contradiction between the instruments of Kaos GL and the instruments of the external trainer. Because of this, there is a contradiction between the way the object is constructed by Kaos GL

staff and the way it is constructed by the external trainer.

My interview participant notes that there was a problem of lack of preparation. While I acknowledge the effect of lack of preparation, I will argue that if the external trainer had had a concept of the pedagogical approach described by Kaos GL staff, the lack of preparation would have manifested very differently. In other words, if they already had instruments in their repertoire that aligned with the examples and stories shared by Kaos GL, ill-preparedness would have taken a different form. Ludwig and Owen-Boger (2018) highlight that, in the instructional design process, the first thing that needs to be acknowledged is that subject matter experts will inevitably have their own default approaches to how training should be delivered. The narrative segment I reported above illustrates that the trainer had a default approach to teaching, which was nowhere near the new approach Kaos GL wished to implement.

At this point, in the context of objectification, it would be useful to draw on the distinction made by Berger and Luckmann (1966) between habitualization and institutionalization. The authors state that habitualization always precedes institutionalization but is not equivalent to it. Their main argument behind this is that even a solitary individual will have habitualized certain modes of work but this does not mean that it will become institutionalized. Berger and Luckmann's (1966) theory of institutionalization is not based on activity theory. But the notion of objectification (which they call objectivation) is a central theme. For example, they write:

Signs and sign systems are objectivations in the sense of being objectively available beyond the expression of subjective intentions “here and now”. This “detachability” from the immediate expressions of subjectivity also pertains to signs that require the mediating presence of the body. ... Signs and sign systems are all characterized by “detachability”, but they can be differentiated in terms of the degree to which they may be detached from face-to-face situations. (Berger & Luckmann, 1966, p. 51)

Here, the concept of *degree of detachability* is useful for understanding the level of objectification of the specific instructional strategies used in the Media School. The meeting between Kaos GL staff and the external trainer is in the form of a detailed briefing where examples and stories of the instructional strategies are shared. This form of objectification through speech has a low degree of detachability. The pedagogical approach and related

instructional strategies are not available to the external trainer under any specific name or in any documented form. The approach is only accessible through Kaos GL staff who embody the model. The staff have habitualized the model but the external trainer has not. Some form of guidance is necessary to start the process of habitualization in the external trainer. This guidance requires the objectification of the overall pedagogical approach and the specific instructional strategies that will go with it.

The foregoing account of the process of preparation by the external trainer needs to be viewed from the perspective of instructional design. The entire field of instructional design is premised on the idea that the person who is the subject matter expert will not necessarily be an expert in either designing or delivering the training (Seel et al., 2017). This is why specific strategies are developed to guide the communication process between an instructional designer and a subject matter expert whenever these two functions are performed by separate people (e.g. Ludwig & Owen-Boger, 2018).

In the case of Kaos GL, the editorial staff perform the function of instructional designer, content matter expert and trainer. The knowledge and skills that the editorial team have accumulated in these three areas based on their experience may not necessarily be present in a subject matter expert. The subject matter expert would need to be guided in the design of the workshops. Within the context of objectification, this would call for a model of interaction between Kaos GL staff and the subject matter expert, which is more structured and processual compared to the communication model currently used. The debriefing meeting is not a processual model of communication. In addition, the guidance of a subject matter expert would also call for the objectification of pedagogical approaches and instructional strategies in policy documents, guidelines, handbooks, etc.

A point that I have not mentioned so far is that the narrative segment I reported above was not brought up by my interview participant on their own. I had asked for an example and it was presented in the context of good examples and bad examples. This is significant for the purposes of this study because my subject did not report a repeated problem. There are no observed regularities where external trainers are constantly unable to deliver the training based on the new pedagogical approach. However, this is precisely why Engeström and Sannino (2011) propose an analytical framework to trace the disturbances identified in speech and check whether

they point to systemic contradictions. My interview participant has not described this incident as an example of an ongoing problem. It does not necessarily have to be perceived as such. The contradiction is structurally present even though it is not aggravated to a level that would require immediate attention. The structural contradiction does not surface because Kaos GL benefits from the experience of long-term instructors who have a shared understanding of the pedagogy. Moreover, it does not surface when new instructors possess the same tacit understanding from their life experience.

The contradiction between instruments of external trainers and those of Kaos GL staff is structurally unresolved. This has certain implications for practice. For example,

Participant 2: It is important for us that they don't just have contact with us. They will be working with us [...] throughout the year in any event. But having an experienced journalist there like A [name removed] is an opportunity. Both to benefit from their experience and also from another perspective. Because [...] when you write news on the same topic, after a while your perspective starts to become very narrow. You start to act by rote. This is why it's good to bring in other journalists.

As noted, Kaos GL recognizes the value of engagement with other professionals. There is an existing pool of external trainers who are familiar with the pedagogical approach due to their history with Kaos GL. There are still others who have an intuitive understanding of the approach and can use it without much guidance. However there is no strategy to capture the expertise of people who may have valuable domain knowledge without the necessary instructional skills to share it with others.

Requisite Variety. I now go back to the law of requisite variety (Ashby, 1956; Virkkunen & Newnham, 2013), which I used in the analysis of the preceding section on the development of the model of the Media School. The law of requisite variety becomes relevant once again in the context of the development of the pedagogical approach of the Media School. Whereas before I examined variety in terms of the possible states of participants of the Media School, on this occasion, I will examine variety in terms of the possible states of external instructors.

There are essentially three groups of external instructors. The first group is composed of people who are long-term instructors. These are people who have been with Kaos GL for a

number of years and witnessed the historical development of the school. The second group is composed of people who have contact with Kaos GL and collaborate on other projects but have not been involved as instructors in the Media School. The third group is composed of people with whom relations are relatively limited. In the case of the first group, very little communication is needed to design and deliver the workshops. In other words, there is regularity in the behaviour of this group when it comes to designing and delivering workshops. This is the reason why they were retained as long-term instructors in the first place. They have a tacit shared understanding of the pedagogical approach as well as the instructional strategies that need to be used.

The second and third groups exhibit less regularity. There is no guarantee that an individual who is successful in one domain of collaboration will necessarily be able to function as an instructor. Similarly, there is no guarantee that an entirely new person will possess the required knowledge and skills, even in a tacit dimension. Kaos GL's response strategy would need to capture the variety in the different states of these potential instructors. Currently there is one predominant strategy—one model of communication—used in developing instruments. This takes the form of a debriefing meeting after which the process is left to the individual abilities of subject matter experts. The model of communication needs to exhibit enough variety to capture the variety in the states of the instructors. In addition, the tacit knowledge pertaining to the pedagogical approach and instructional strategies need to be objectified in multiple levels and forms to capture the variety in the needs of the instructors. This will potentially allow Kaos GL to build the instructional design knowledge and skills of subject matter experts so that their expertise is made more accessible to the participants of the workshops.

In addition to the pedagogical principles and instructional approaches that can be named and shared more easily, the content matter of Kaos GL's Media School can be further clarified and contextualized by objectifying it through more specific names. For instance, when the new Media School was launched, an announcement was made on the Kaos GL news portal that the school would now cover social media, digital security, digital storytelling etc. (Kaos GL, 2015a). Elsewhere, reference is made to digital literacy in the context of digital security in Media School workshops as well as issues such as censorship (Kaos GL, 2015c). The conceptual change that guided the *New Media School* in 2015 was also explained by Participant 2. Terms such as digital security, digital literacy, social media use, digital storytelling fall under the broader categories of

digital citizenship and *digital competencies*, which are concepts that have an established place in policy documents such as those that are produced and used by the European Union (e.g. Carretero et al., 2017). Digital citizenship education is recognized as the empowerment of learners of all ages to acquire the skills they need to participate fully in a digital society in order to defend human rights, democracy and the rule of law (Council of Europe, 2019). Hence, policy recommendations made to states in the context of digital citizenship education involve not only children but people of all ages in formal, non-formal and informal educational settings in line with the principle of lifelong learning (Council of Europe, 2019). Referring to such documentation and *names* when situating the activities of the Media School can offer the potential to broaden the practice.

During the interviews, Participant 1 explained that Kaos GL had launched a project on an oral history of the people and the organizations involved in the LGBT+ movement. I had referred to these oral histories when presenting the case. Participant 1 stated that the project was originally designed to include Media School participants. In other words, the publication on oral history and the video interviews with people, which are currently published online, were initially intended as a project in which Media School participants could produce content. However, due to donor limitations around the acquisition of technical equipment as well as regulations restricting the sharing of such equipment with learners, Kaos GL was unable to include Media School participants in the actual production stage where video cameras and other technical equipment were needed. *Access to digital technology* is regarded as an integral part of digital citizenship education and comprises learners of all ages (Council of Europe, 2019). The knowledge of such concepts and naming of activities by referring to them has the potential to broaden the scope of legitimate argumentation that can be presented to donor organizations in the long run when negotiating new rules.

Section 3: Building Long-Term Relations

This section is about the efforts made by Kaos GL to build and maintain long-term relations with local correspondents. There are several mechanisms introduced to support this process. I conceptualize these mechanisms as models of interaction that are instrumental for productive activity. This section analyzes these models of interaction used by Kaos GL to build long-term relations with local correspondents. The section concludes with an analysis of the remaining contradictions in the models of interaction.

Individual and Organized Relations

The Local Correspondents Training was launched in 2007. For eight years it followed a more or less similar structure until the concept level changes introduced in 2014 and implemented as of 2015. Starting from 2008, the workshops were organized in multiple cities. The duration would usually be two days. By 2013, more than 300 people had participated in the workshops (Kaos GL, 2013). However, it was becoming increasingly difficult to maintain communication with local correspondents.

As of 2013, a new notification starts to appear in the announcements for the workshops. Kaos GL announces that extra effort will be made a) to build direct ongoing communication with local correspondents who take part in the workshops, and b) to include local correspondents in Kaos GL Association's policy development and implementation processes (Kaos GL, 2013).

A more conscious effort appears to introduce mechanisms that enable long-term organized relations. Structured feedback and evaluation meetings start to take shape gradually as a means to involve local correspondents in the policy-making processes of Kaos GL Association in general and Kaos GL news portal in particular. When I asked for more details about this process Participant 1 explained that it was an effort to transform the relationship Kaos GL had with correspondents from an individual-oriented one to a more organized one.

Participant 1: That has to do with the perceptions in journalism as a profession. The relationship we have there is freer and more independent, it's less organized. And the question at the time was whether that's undermining the foundations for a more organized type of relationship with correspondents. So in 2013, 2014, those reminders you're talking about, those are reminders to draw attention to that. I mean, they're not

just reminders announced to correspondents, they're reminders directed at us as well. We're declaring that this is how we will organize our relations with correspondents.

There is also a broader decision that gives direction to this declaration of intent:

Participant 1: The years 2013, 2014 correspond to a period in which Kaos was becoming more organized and making an effort to build more organized relations with collaborators. For example, organized work like those in the working groups—the labour union group, the education working group, the social service working group— were becoming more active. And at that time we had a brief discussion about whether we're able to build the same kind of organized relationship with correspondents.

There are attempts to transform the nature of the relationship between Kaos GL and local correspondents. Feedback and evaluation meetings become one instrument to guide this process.

The feedback and evaluation meetings with local correspondents take place in two main formats. They are either distinct events held in a particular venue on a particular date, or they take place as an extension of the Stage II Media School workshops on the last day. In this second format, although the session is conducted as part of the workshops, its focus is not the training that was just completed. Instead the focus of the sessions is the relations of Kaos GL with correspondents, and policies regarding the news portal and the Media School.

Effort is made to spatially and temporally separate the feedback and evaluation meetings from the training workshops. For example in 2017, Kaos GL organized an event and invited both new and old members of the Local Correspondents Network as well as a number of scholars. The participants were invited to discuss and evaluate the state of the media in general and the policies governing Kaos GL news portal and Kaos GL's relations with correspondents. This was a large-scale gathering situated within a series of events organized on occasion of the International Meeting Against Homophobia and Transphobia Kaos GL organizes each year. However, due to financial constraints and program intensity, it is not always possible to hold a separate event exclusively for evaluation purposes. Such events for correspondents have been organized under a number of different names. The events that are specifically aimed to encourage feedback and evaluation from correspondents appear to be crystallizing and becoming institutionalized under the name *Local Correspondents Media Coordination Meetings*.

Building Long-Term Relations: Interim Analysis I

In the previous sections, I have presented the analyses focusing on two main activity systems: the training activity system and the instrument producing activity system. This section calls for an analysis in additional activity systems. In the narrative segments I reported in this section, Kaos GL's efforts are oriented towards an object that is qualitatively different from the ones I have discussed so far. In this particular instance, the object of Kaos GL's activity is the Local Correspondents Network. There are two main issues that constitute the grounds for this analysis. The first is about the increase in the number of people in the network to a level at which it becomes difficult to maintain relations. The second is about the form of the relationships that should be built with people in the network.

Regarding the first issue of increase in numbers, Participant 2 reports on the organization of workshops in 2016. The thematic focus of the Media School that particular year was fundamental human rights. The thinking behind this was that even if local correspondents are not tasked with human rights monitoring for the news portal, they should still be equipped with the fundamental concepts of human rights as people who produce content.

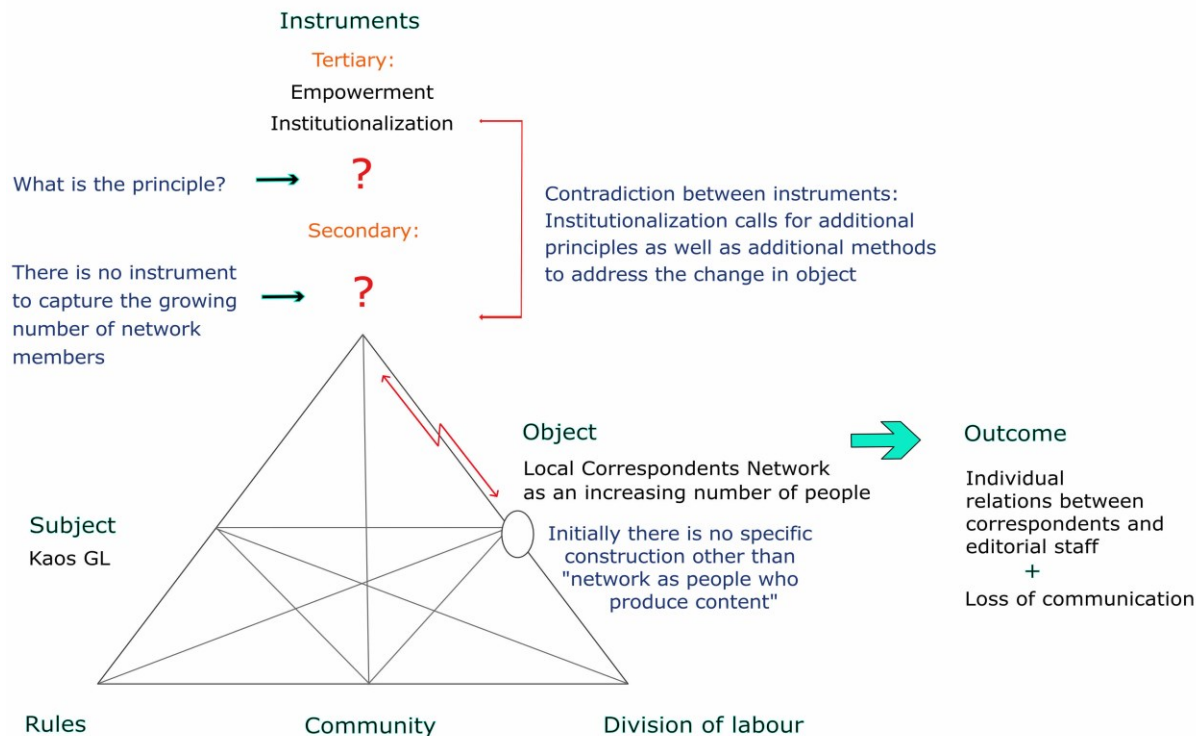
Participant 2: That year, we went crazy. It was 2016 if I remember correctly. We went to seven cities together with B (name of external instructor removed). And the program was like this: for half a day or one day he would talk about the fundamental concepts of human rights, and then in the afternoon for either half a day or one day, I would talk about news reporting. And we went to these seven cities in three months. We prepared the program and everything really well, it was great. But then how are we going to maintain communication with all those people in those seven cities? We couldn't. For example I remember we talked about this in 2016. I mean, is this about reaching out to as many people as possible, or is it about reaching out to people who can write for us?

With respect to the question about the form of the relationships with correspondents, I have already noted concerns by Participant 1 regarding individual-oriented relationships versus organized relationships. Hence, this section will focus on these two different models of interaction.

The individual-oriented model of interaction is used by the editorial team after the workshops. Maintaining communication with new local correspondents is recognized as a

specific task. It is work. The editorial team make a distinct effort to keep in touch with newcomers to encourage them to write. This is done directly. For example, local correspondents would be contacted and asked whether they would like to cover a current event in their city. In addition, the editorial team is responsible for direct, individual communication with contributing correspondents. This involves the routine communication around the process of publishing such as receiving submissions, editing them, getting back to contributors, etc.

On the other hand, the organized model of interaction points at an effort to construct the object. In activity theory terms, this effort could be formulated in the form of the following question: How can we construct the object of this activity in a way that aligns with the construction of objects in other activities, such as those found in the social services working group or the education working group? To examine this process of object construction, I have relocated Kaos GL staff as subjects in what I will call the *network-building activity system* in Figure 14.

Figure 14*The Network-Building Activity System*

Note: The figure depicts the historically earlier contradictions in the network-building activity system oriented at local correspondents. The figure points at the needs to develop a model of interaction to capture the changing reality of the Local Correspondents Network.

In the early years, the Local Correspondents Network appears to be an unreflected object. It is fuzzy. There is an overlap between the construction of the network and the construction of the participants of the training. I reported earlier that the construction of the participants of the training evolved over time. In the beginning it was constructed as *content producers for the news portal*. This construction later expanded into *participants as content producers and activists*. Finally in the last section on pedagogy, I noted that the construction of participants was temporally expanded as *content producers in the present* (the activist dimension is still retained although it was not addressed in the previous section). In the early years, the construction of the Local Correspondents Network appears to be only quantitatively different from the construction

of the participants of the training. Another way to put this could be as a question: If we are using the word *network* to describe a formation, what distinct qualities does it have that prevents us from calling it, say, *media school alumni who contribute to the web portal*? In the early years, there appears to be no specific construction that points to a difference. Here, I am not asking what type of network this would qualify as if we conducted a network analysis. Neither am I suggesting that the participants of the Media School are not networked in a general sense. On the contrary, the very first section of this analysis was about how the Local Correspondents Training was instrumental in helping people become organized. This is not the general sense of organization or networking that I am referring to. The question here is about whether there is reflection by Kaos GL on what is meant by a network and what distinguishes it from other formations we would name using other words. The comments of Participant 1 above point to a stage at which Kaos GL was reconceptualising the Local Correspondents Network (object) as an organized formation. Therefore, the initial unreflected object does change over time. However first, I need to refer back to Figure 14 to discuss the contradictions at this specific historical juncture.

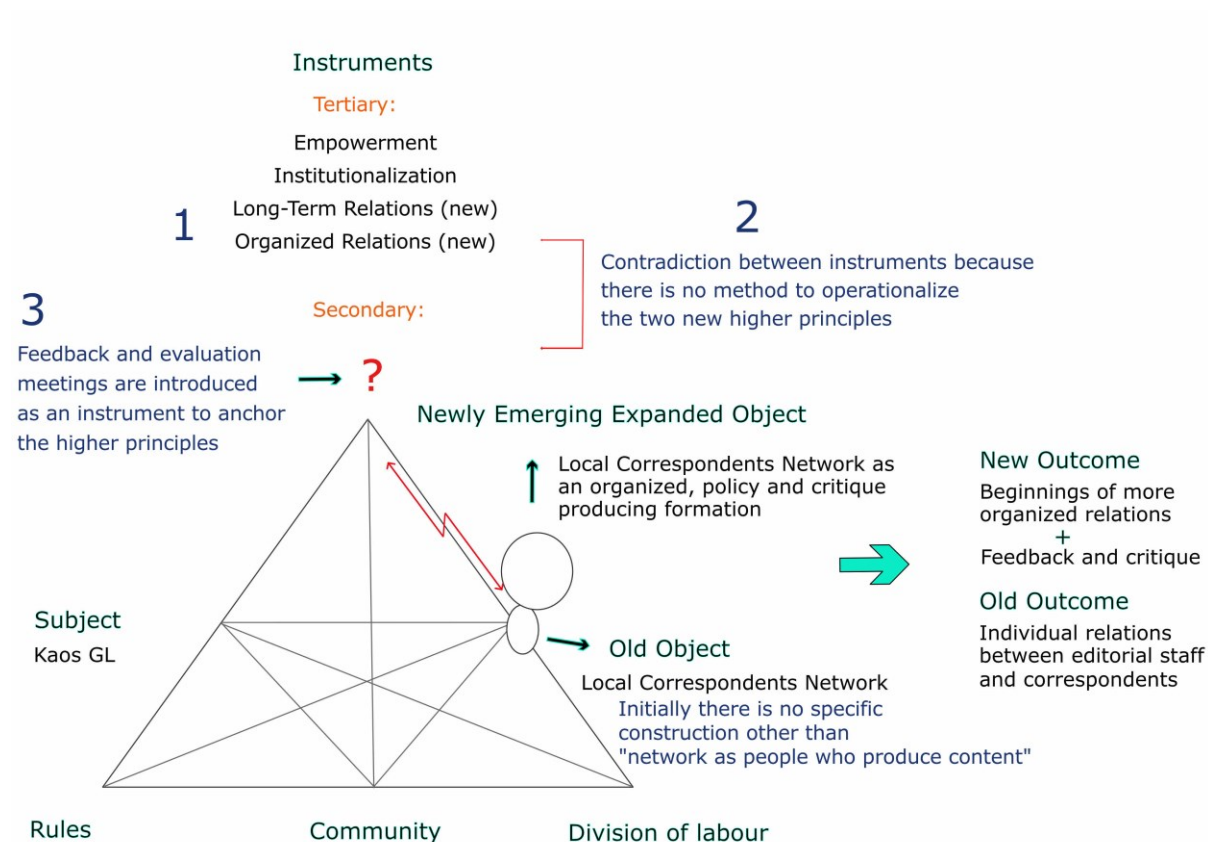
In Figure 14, the higher order mediating principles are, again, empowerment and institutionalization. The object is the Local Correspondents Network in unreflected form. In this particular instance, the object has a name. It is called a *network*. However there are no higher level principles to guide the process of constructing the object as a network. In addition, the number of members in the network is increasing. At this point in time, this basically means that the number of people who participated in the workshops is increasing. However there is no secondary instrument in the form of a communication model or a method to capture the quantitative change in the object. Hence, there is a layered contradiction between the object and the instruments. The lack of a higher order principle and the lack of a secondary model or method contradicts the material reality of the object. In addition, there is a contradiction between instruments. The higher order principle of institutionalization calls for a response to the object. It calls for additional principles and additional methods or models. At this time, the network-building activity system produces one-on-one communication between correspondents and Kaos GL staff. It also produces a loss of communication.

Moving forward in time, Figure 15 shows the emergence of two new higher order principles. These are the principle of building *long-term relations* and the principle of building

organized relations. These principles start to be verbalized in announcements for the Local Correspondents Training. The announcements reflect the discussions Participant 1 reported above. As a result, and because an object can only be constructed, shaped and stabilized with the necessary instruments or instrumentalities (Engeström et al., 2003), a new *ideal construction* of the object starts to emerge: *the Local Correspondents Network as an organized, policy and critique producing formation*.

Figure 15

The Network-Building Activity System II

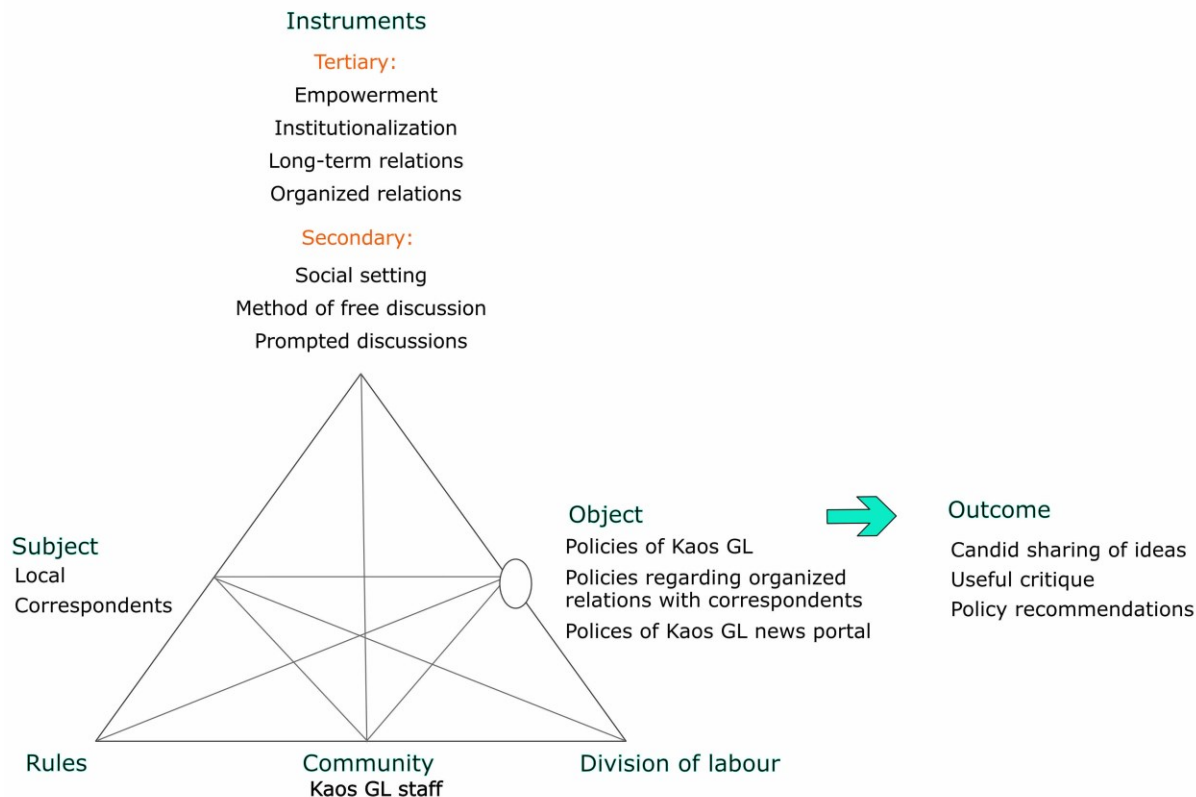


Note. The figure depicts the next phase in the network-building activity system. Two new principles are introduced. This time, there are new contradictions that arise in the process of transitioning from individualized relations to organized relations with the Local Correspondents Network.

At this point in time, there is still no secondary instrument, no model or method to transform this ideal construction into a material one. The contradictions at this phase are depicted with the red lightning shaped arrows. There are two main contradictions. The first is between the newly emerging ideal object and the lack of a secondary instrument. There is no method or model to function as an instrument that can be used to transform the ideal formation of the object into an outcome. The second contradiction is, once again, between the instruments. There are now two higher-order principles, newly introduced, but there is no secondary instrument to bring them to the ground. The two newly introduced principles remain abstract concepts.

Moving further in time, Figure 15 also shows the entry of the secondary instrument into the system. When the feedback and evaluation meetings start to take shape, they function as the necessary instruments to transform the ideal construction of the object into an outcome. It is significant that Participant 1 notes that that is how they see the meetings—as an instrument.

Participant 1: So really, it's linked to those other areas. We do not want them to evaluate the training or their relationship with Kaos, we want them to evaluate their organized relationship with Kaos. And we're also positioning that as an instrument for organization. The meetings are *an instrument for organization*. It is important to take a closer look at the methods used during these meetings and the outcomes they produce. Participant 1 does not call them evaluation meetings per se. They refer to them as feedback meetings after which Kaos GL conducts its own evaluation. However I find that the word feedback does not sufficiently capture the nature of the meetings. They are evaluation meetings in their own right, albeit distinct from the ones that Kaos GL holds internally. The object of Kaos GL's own internal evaluation meetings would be differently constructed. Therefore I am calling the formation the *feedback and evaluation activity system of correspondents* and designating it as a *critique-producing activity* (Figure 16).

Figure 16*The Feedback and Evaluation Activity System of Correspondents*

Note. In this critique-producing activity system, the local correspondents occupy the subject position. Kaos GL is relocated in the community position. There appears to be no contradictions in the system when the activity system manifests in physical space.

I mentioned earlier that these meetings take two forms. They are either separate events or embedded in the Local Correspondents Training as a separate session on the last day. Theoretically speaking, this does not make it a different activity system. It is the same activity system as long as its object has not changed. Space functions as an instrument. It is not what gives activity its identity.

To analyze this process I have positioned the local correspondents in the subject position of the activity system. On this occasion, there is enough secondary data provided by my interview participants to be able to identify the instruments that mediate the activity of

correspondents in the activity system when they are relocated as subjects. The correspondents are the ones who are expected to produce the critique. Kaos GL staff are represented in the community position. The following excerpt from Participant 1 sheds light on one method used to generate critique as well as their own positioning in the background as listeners:

Participant 1: So there, we don't answer people, we don't say "well you misunderstood that" or "that's not like that". We don't do the evaluation there, we only get feedback from everyone who is producing content for Kaos GL. We tell them that we will evaluate these. And then we get back to them. We say, "we discussed these issues and this is how we addressed them. And this is the path we will follow".

The object of the critique producing activity system is a) the policies of Kaos GL, b) the policies regarding organized relations with correspondents, and c) the policies of Kaos GL news portal. This is the object on which all attendees are asked to focus their attention. It is the problem space, which needs to be shaped into an outcome. The critique producing activity is also mediated by the secondary instruments, which include the method of uninterrupted free discussion, which is prompted in a social setting with peers. This is a new model of organized interaction through which correspondents become involved in policy decisions. *They produce policy recommendations and critique and not just content for the news portal.* When they are positioned in this kind of an activity as subjects, the fuzziness of the Local Correspondents Network starts to disappear. It starts to become a formation distinct from what we would call *Media School alumni who produce content.* Below I give examples of the types of critique produced and the subsequent policy changes that followed.

In one of these meetings, which I am theoretically locating within the critique-producing activity system, the issue of policies around the choice of content for the news portal was brought up. This discussion concerned a routine practice that Kaos GL had adopted ever since the news portal was launched. The practice was to republish opinion pieces by intellectuals, professional journalists or scholars who were affiliated with Kaos GL or supportive of the LGBT+ movement. This meant that articles that were not exclusively written for Kaos GL news portal, and which were not necessarily always LGBT+-related, would be featured, even though they had already been published in other news outlets. However, it turned out that the presence of articles written by established journalists was intimidating for many members of the Local

Correspondents Network who were volunteers. It raised the bar and people were reluctant to write. In a space where renowned professionals were given such a large space—sometimes two or three articles each per week—local correspondents became demotivated. Participant 1 recalls a comment by a local correspondent: “Next to them, I feel that an article I write about the homophobia I experienced during the Rose Festival in Isparta won’t be published [reference is made to an annual local festival in a Turkish province].”

Participant 1: That made us ask the question: do we really want to publish X’s articles [name of journalist removed]? Because X’s articles are already in circulation in 32 thousand places. And it already finds its way to different target groups in Kaos’s network. [...] The question made us think that the problem in Isparta is indeed more important for us. Because there is no other outlet where the issues in Isparta can be published. But the articles by X are already being published elsewhere.

This critique feeds back into the publishing activity and starts to reshape the object in that activity system (the publishing activity system will be discussed and graphically represented in the next section). As a result, Kaos GL starts asking new questions: What should be the object of the news portal? In other words, what kind of content should the news portal feature? I will return to this example in the next section when discussing the process of developing the publishing policy for the news portal.

The critique-producing activity system is a theoretical construct. Therefore, time is an instrument, just as space is. For example, although I mentioned that the last sessions of the Media School workshops are dedicated for this purpose, the critique-producing activity system is not confined to these times and spaces. It also emerges in the middle of a training workshop. Participant 2 reports on a productive session with an external instructor who structured the training specifically to produce such critique. In the preparation phase, Kaos GL editors had asked them to use Kaos GL news portal as a source for building critique and engaging the participants. This person examined the content featured on the news portal and later prompted workshop participants to a critical review. The prompts offered by the instructor triggered an intense wave of critique from participants. The conversation shifted to Kaos GL’s policies around the type of content that gets published:

Participant 2: They all started to make suggestions. They said things like, the news you write is so serious it bores us to death. KaosGL.org is a boring place. You keep talking about hate crimes and violence and then more violence, it drains our soul. We want to do fun things. We get depressed when we read KaosGL.org, We feel the need to see a psychiatrist. These were the types of comments that came out.

This interaction is made possible with the instruments in the critique-producing activity system (Figure 16). The subjects' activity is mediated by a social setting with peers, it is prompted both by the comments of the instructor and by the comments of peers. It is also mediated by a model of interaction that allows free, uninterrupted discussion. I asked Participant 2 about their own role during these interactions: "I participate in all workshops either as an instructor or as an observer. Like big brother, that's what all Media School participants tell me, that I'm the auditor sister sitting in the corner." When further prompted, Participant 2 explains their own position as follows: "You would have observed me sitting in the corner constantly taking notes, not interfering with the presentation."

To put these narrative segments in a wider context, I feel the need to go back to first principles. I do this because I feel that when attention is directed to specific events, the foundational ideas of a theory tend to become more distant, more abstract. The act of placing a series of words on top of a triangular representation and calling them instruments should not draw attention away from the fundamental idea that the critique-producing activity is a productive activity. The concepts I am designating as instruments are actually parts of a wider instrument of production which takes the form of a model of interaction. To clarify this, I refer back to the foundations.

In his exposition of the status given to activity in Soviet psychology, Wertsch (1979) explicates the connections between the works of Marx and the works of Vygotsky. When explaining the concept of mediation and the nature of the instruments humans use to mediate their productive activity, he cites the following passage from Marx:

An instrument of labour is a thing, or complex of things, which the labourer interposes between himself and the subject of his labour, and which serves as the conductor of his activity.... The use and fabrication of instruments of labour, although existing in the germ among certain species of animals, is specifically characteristic of the human labour-

process, and Franklin therefore defines man as a tool-making animal. (Marx, 1906, as cited in Wertsch, 1979, pp. 23, 24)

In the context of psychology, Wertsch (1979) underlines that Vygotsky took the notion of an instrument of labour from Marx and extended it to cover all kinds of signs and sign systems, which are also instruments produced by humans.

In the literature review to this study, when I presented Vygotsky's (1978) model of the mediated act, I pointed to the distinction he made between a tool and a sign: the first operates directly on the object, the second is used by the subject as a tool to organize the mind so that the subject may organize their actions to work on a task. Elsewhere, Vygotsky (1979) makes the same distinction by referring to these two devices as technical tools and psychological tools: "in human behavior one encounters many artificial devices for mastering mental processes. By analogy with technical means we may justifiably label these devices 'psychological tools' or 'instruments'" (p. 136). He continues to explain how these two concepts are similar yet distinct:

This analogy, like any analogy, has its limits and cannot be extended to a full comparison of all the features of both concepts. Therefore, one should not expect to find every property of labor tools in these devices. To be justified, this analogy must be correct in the central, most essential feature of the two concepts that are being compared. What is important is the role that these artificial devices play in behavior and how they are analogous to the tool in labor. (Vygotsky, 1979, p. 136)

In other words, the functions served by a psychological tool are similar to the function served by a technical tool.

Hence, when Engeström (2015) builds on Vygotsky's ideas and proposes that the instruments of expansive learning are models, methods or methodologies that people collectively create to organize and coordinate their collective activity, he is talking about them in the context of *instruments of labour*. These are collectively created and used in a productive activity system. It is difficult to collectively create these types of instruments of production. This is why the Change Laboratory method is structured and implemented over an extended period of time to guide people in the process of developing the models, methods, methodologies they will use in their productive activities, regardless of what they are producing (Virkkunen & Newnham, 2013).

The foregoing first principles help us better understand how Kaos GL's *model of interaction* during these meetings with local correspondents is an instrument of labour— an instrument of production in a system that produces critique. It is, of course, different from other instruments of labour they may be using during these events, such as laptops or flipcharts or projectors. Nevertheless, the model is an instrument. This is what Wartofsky (1979) describes when he argues that models of social organization, as well as models of division of labour are tools used in production. He calls them secondary artefacts and points out that these are different from the physical tools humans use because they are representations of a practice that are distinct from those tools directly used in production such as “axes, clubs, needles, bowls etc.” (Wartofsky, 1979, p. 201).

It is easier to recognize this aspect of models as instruments of production when they are observed in a system of economic production. For instance, the lean management model is a process-oriented complex model of production developed by Toyota corporation in Japan (Mann, 2010). The model revolutionized the car manufacturing industry and later became appropriated by other industries. Senge (2006) discusses the difficulties other companies had in their attempts to appropriate the lean production model. The model is not a machine that can be bought and installed and Senge (2006), being a foregoing representative of systems thinking, argues that we need to look at how the parts of the model work together and complement one another in a complex system.

When we scale these principles to a local productive activity such as the one that produces critique, we can understand why the parts have to work together. The list of words I am placing on the top of the triangle represent specific principles and methods. Together, they make up a model. The fact that Kaos GL staff have an institutionalized pattern of behaviour to stop themselves from interrupting people when they produce critique is not a mere nicety. Its significance cannot be understood if it is taken only as a demonstration of respect without looking at how it functions within the bigger model. It does not function by itself. Therefore, the concepts on top of the triangle under secondary instruments should be viewed not as models in and of themselves, but as aspects of a model. Hence, the *model of interaction* in the critique producing activity is one which is organized/mediated by a) a social setting in which correspondents are together with their peers b) a prompted discussion environment where either a workshop facilitator or an instructor establishes the focus c) a free discussion environment in

which their input is not blocked or challenged. These secondary instruments, of course, are guided by the higher-level principles. This entire model works as a whole to enable the production of critique that becomes critically important for Kaos GL to change its policies and push its activities further. In Section 2, I had analyzed how Kaos GL had taken a rule advised by a donor organization and transformed it to meet its own needs. Participant 1 had reported that this becomes possible when you feel empowered enough to challenge them. The critique producing activity system is equipped with the methods and principles to empower local correspondents so that they may challenge Kaos GL's activities and transform them. This is productive activity. With this model of interaction in mind, I now turn to the model of interaction outside those that occur in the physical settings I reported so far.

Physical and Virtual Space as Instruments

Once the Media School workshops are completed, maintaining communication with individual correspondents becomes a distinct task for the editorial team of Kaos GL:

Participant 2: So when it is over, now there's another job for us to do: we need to maintain the communication with the people in that city. At the end, we tell people to write to us if they have any suggestions but most of the time there are no suggestions that come to their minds. It's usually the case that we ask them. For example we ask: this or that thing happened in S [name of city removed], would you be interested in doing something about it, etc.? If we ask twice and get a positive response, we continue with those people. The third time, we stop nagging people—if they're not interested in writing or anything. But at the very least, they know that if there's anything going on in their city, they can call me, that I'm only a phone-call away.

The above example concerns the process of content production by correspondents. The description of the tasks performed by the editorial team after the workshops point to a different model of interaction than the one observed in the meetings. The excerpt also points to a lack of initiative to respond on the part of workshop participants.

In addition, local correspondents are also invited to share their views about new policy documents or decisions that are published on the Kaos GL news portal. For example,

Participant 2: These are documents that we share with everyone about the things we plan to do. We were publishing them on the website, open to everyone. And we find that important, that it shouldn't be an internal document. Because what we do is publishing and we publish to the public so we were publishing those for the LGBT+ community. And underneath it we would write, if you have any suggestions, write to us. Actually no one really writes in response to those texts. But that's how we were documenting these at the time. For example, what we'll be doing in the fall. [...] So for example, in that document we produced after the famous workshop, we wrote that we will develop a publishing policy, we say this is what we'll be doing, this is what we'll be doing in the Media Schools. This is what we'll be doing in media monitoring, We also say we'll be doing a study on oral history.

In this instance local correspondents are invited to make suggestions about policies and plans of action. This second example also demonstrates a model of interaction quite different from the ones in the meetings. Again, there is rarely any response to these texts.

In the next analysis section, I will examine this model and compare it to the ones that take place in shared physical space.

Building Long-Term Relations: Interim Analysis II

My interview participant mentions the two instances I reported above in passing. The remarks about the correspondents rarely responding when they are asked to make suggestions or share ideas were not articulated in the form of a problem. By contrast, the inability to communicate with a large number of people after delivering training in seven different cities was clearly articulated as a problem by the participant. In any event, the coding and analysis framework I am using requires that segments are examined to understand whether there are structural contradictions in the activity systems they occur in even if they are not stressed as problems by interview subjects. In this instance, the contradictions can be observed structurally when we adopt the systems view, however they do not manifest as a huge problem when we take the subject's view. They are not aggravated to a level that causes distress for Kaos GL editorial staff.

There are two activity systems relevant to the segments above. The first one concerns the writing activity of local correspondents and is linked to the overall publishing activity system.

The second one is the critique-producing activity system I have already discussed. In the example above, hypothetically, the correspondents would be positioned as subjects in their own writing activity as they are generating ideas and reflecting on the content they will produce. Again, they would be positioned as subjects in the critique-producing activity as they reflect on the policy or action plan just published by Kaos GL. As I mentioned earlier, both space and time are instruments in these two activity systems. They are not what define the activity. For example, when we carry over the critique-producing activity system into virtual space, it is still the same activity system as long as its object has not changed. In other words, the model of interaction that regulates the relationships after the workshops is an instrument in the same activity system in a theoretical sense. For the purposes of the analysis in this section, I will not draw these activity systems. The discussion in this section would apply to a number of different activity systems therefore I will not focus specifically on one. I will, however, mention them throughout the discussion.

In events organized by Kaos GL in physical space, people not only share the products of their work, but also the process that leads to the product. In the Media School workshops, they share the process of reflection and the process of content creation. In the feedback and evaluation meetings, they share the process of producing critique. They are not left alone to formulate their ideas and present them to others only in the form of a final product of reflection. The reflection process itself takes place in interaction with others. Outside of these events, correspondents who are already contributing to the news portal primarily share the product of their work with the editorial team. If it is accepted, the product is shared with everyone. In the case of critique, outside of events that take place in physical space, people rarely share the product of their reflection. So in cases where people are asked to share their opinion about a new plan or policy published on the news portal, there is no input. We have no interview data to guide us in understanding whether correspondents actually engage in a process of reflection and choose not shared their ideas, or whether they do not reflect on the policies or decisions made available to them.

The editors' invitation to participants to feel free to contact them when they have ideas is an attempt at process sharing. It is an invitation to share a process of content production. The notice posted to readers when a new policy is published leans more towards sharing a product of critique.

The individual model of interaction used by the editorial staff is a conscious effort to build long-term, object-oriented relations. I underline the words *object-oriented*. This effort is distinct from simply maintaining individual contact with people. It preserves the productive aspect of the activity. This model is in line with Kaos GL's declarations of intent about making an effort to establish direct relations with correspondents. There is no contradiction there. The contradiction arises due to a lack of an *object-oriented organized model of interaction in virtual space*. In other words, the methods that enable the interactions in physical space do not appear to be incorporated into the virtual model of interaction. When Kaos GL staff ask participants to contact them to make suggestions, concerning ideas for content production or critique about policies, the default tools for this interaction are email or phone. There appears to be no other instrument. Again, I am not suggesting that these are the only instruments used by Kaos GL for general communication with the community. Kaos GL has social media accounts that are regularly used to share news and events. However email and phone appear to be the only instruments used for object-oriented productive activity.

The way it is used, e-mail as a tool does not accommodate a model of interaction that aligns with the higher order principle of building organized relations. It establishes a line of communication between an individual correspondent and an editor. It does not establish lines of communication among the correspondents. As I already noted, this model needs to be retained because of the higher-order principle indicating that Kaos GL will make an effort to build direct long-term relations with correspondents. However, the absence of an additional model of interaction in virtual space contradicts the higher order principle of *building organized relations*. Moreover, the model is not capable of capturing the quantitative change in the Local Correspondents Network. These contradictions appear to be unresolved.

To discuss the possibilities of how these contradictions may be resolved, I will use the example of an online private discussion forum dedicated to the Local Correspondents Network. This is to illustrate the different aspects of a model of organized object-oriented interaction in virtual space. Hypothetically, this would be hosted on the URL of the Kaos GL news portal. I refrain from using an example of corporately-owned social media space. This discussion is about instruments of production. So far, the focus has been on secondary instruments. This is the first time in the analysis that primary instruments have arisen as a topic of discussion. E-mail accounts, phone numbers, virtual forum space are primary instruments. It is my personal

conviction that Kaos GL should have ownership of their primary instruments of production and virtual forum space is not an exception. Virtual space owned by private entities would imply limited control. For instance, Google+ which was Google's social media space was shut down by the company due to security reasons, obliging long-term users to relocate or simply lose their space (Hern, 2019). This leads to a loss of history. The point of departure in this discussion is Kaos GL's dedication to building long-term organized relations. Therefore anchoring the Local Correspondents Network in a virtual space held by Kaos GL appears to align better with this objective.

When local correspondents are anchored in virtual space in a specific venue, this corresponds to the anchoring of people in physical space during training or feedback and evaluation meetings. This is a start but is not sufficient by itself. Anchoring all Media School alumni to a virtual space would be akin to inviting them to a meeting, putting them all in a room and then waiting for something to happen. Since the focus here is object-oriented productive activity, I refer back to the principles and methods that have arisen to be instrumental in the success of other activities. Not all of these interactions can be digitized. However some salient aspects can be retained.

Socialization, has arisen as a higher order principle in all activities. Both participants have underlined this principle. The principle of socialization is operationalized differently in different cases. However it is instrumental not only for production of content but also for the production of critique. With respect to the critique producing activity and content producing activity during workshops, people are in a social setting. An idea offered by one person prompts further discussion by someone else. In addition, the instructor prompts the discussion by introducing focus. Moreover, there is a free environment of discussion where people are not interrupted. Participant 1 also noted that people become motivated to produce when they observed their peers producing. This would apply to producing both content and producing organized critique. The other higher order principles relevant here are empowerment and institutionalization.

The model of interaction on the forum would require the incorporation of these principles. Therefore the design of the interaction would first require the generation of a list of questions about how these different principles and methods can be reflected in forum design. It is

important to underline that when a forum is being designed, it is not about designing an interface; it is about designing an interaction between people, digital objects and the substantive material being discussed on a forum (Dix et al., 2004). Therefore, the starting point would necessarily be questions about what kind of object-oriented interaction we wish to see. Some questions to consider would be as follows: Does it make sense to include everyone who has attended the Media School workshops in this platform so that newcomers can regularly interact with old timers? Or, should different cohorts be anchored in different spaces within it? How would these spaces be moderated? Should the moderation be undertaken by Kaos GL staff or should responsibility be distributed among local correspondents reporters? What will be the declared purpose and rules governing the interaction in this space?

The discussions on the forum would also need to be flexibly prompted, just as they are done in events organized by Kaos GL in physical spaces. In this case, other questions arise: How often should Kaos GL editorial staff do the prompting? It would be reasonable to post any new practices, meeting results, publishing principles etc. in the virtual space. This would be a prime example of taking initiative for object-oriented, prompted discussion. However other than that, how much *air time* should Kaos GL staff occupy on the forum?

It was noted by interview participants that people became motivated when they had a good time socializing and left the Media School with memories. By extension, it makes sense to ask the question of whether the virtual forum will permit casual conversation. Will participants also be able to create such memories in the virtual space by being allowed to talk about anything under the sun? Casual conversation may help to promote object-oriented discussion rather than deter it. In the context of content production, should there be additional spaces within the forum to allow people to work in small groups? How would these be organized?

These are only some of the questions that would need to be answered in the beginning. The functionalities of the forum would need to be addressed only after the model of organized interaction is designed. And finally, the process would be concluded with questions about what the interface should look like.

Building Long-Term Relations: Concluding Analysis

Requisite Variety. The contradictions I analyzed in this section are particularly noteworthy. In Section 1, I reported that the model of a mobile school was introduced to reach out to as many people as possible with the available funds. The main argument for this at the time was that there were no regularities observed in applicants of the Local Correspondents Training to allow for a decision to be made about who should attend. There was too much variety. Designing a local training delivery model in the form of a school-on-wheels alleviated the burden of selection and increased the likelihood of finding people who would be willing to write for the news portal. The design resolved the contradiction at the time.

The analysis in this section shows that the same design which resolved past contradictions is now creating new ones. These are still unresolved. The number of people who attend the workshops is increasing at a rate that makes it more and more difficult to maintain communication. The existing model of individual-oriented interaction between correspondents and editors is necessary but technically not capable of capturing the quantitative change. The models of interaction need to be diversified.

Efforts by Kaos GL to introduce an organized model of interaction in the form of feedback and evaluation meetings are excellent examples of requisite variety. These capture the changing object and transform it into a Local Correspondents Network with its own identity. The organization of Media School in two stages also becomes instrumental for building organized long-term relations. This too is an organized model of interaction and introduces variety. However these events are confined to physical space. They can only be held several times a year. A model of organized interaction in virtual space could allow Kaos GL to anchor the Local Correspondents Network in a space where organized production can be extended beyond physical space. It would also alleviate the burden of individual communication. The models of object-oriented interaction in virtual space would need to demonstrate the same amount of variety as the models of object-oriented interaction in physical space.

Section 4: Building a Publishing Policy

This section is about the development of Kaos GL's publishing policy for the KaosGL.org news portal. The analysis starts with the disturbances that gave rise to a need for a clearly articulated policy and continues with the actual process of its development. The section concludes with a discussion of remaining contradictions and some questions that may serve to guide explorations into additional models of knowledge sharing.

Content Exclusivity

In the previous section, I mentioned that one of the major critiques from local correspondents concerned Kaos GL's policy of featuring articles by renowned professional journalists on the news portal. Local correspondents voiced these concerns during a large-scale feedback and evaluation meeting in 2017. Some people were reluctant to submit their own content to a news portal that gave such wide space to professionally produced work. Even when content was submitted by local correspondents and featured on the portal, it was buried among the work of these other journalists.

This feedback triggered a process of questioning among Kaos GL staff regarding their own priorities and policies in terms of publishing. The practice had been going on since the early years of the news portal. Opinion pieces and news articles that were considered important were featured on grounds that Kaos GL had a mission to inform the LGBT+ community. It was also easy to publish pieces by professional writers because they had already gone through an editorial process. These pieces did not require time and effort since they had already been published in other outlets.

In 2017, Kaos GL staff makes a conscious decision to stop featuring articles published in other outlets. This brings a significant change to the profile of the news portal. It is no longer filled with content produced by established writers. In addition, pieces written by the community become more visible.

Participant 1: So, for example, in 2007 maybe the correspondents at the time were writing more but we were publishing ten times more content that had already been published elsewhere. And that made the content produced by our correspondents invisible. But now, especially after 2017, there are people who are recognized as Kaos GL

correspondents. And the thing that made that possible was that we no longer publish pieces circulating in 32 thousand other places.

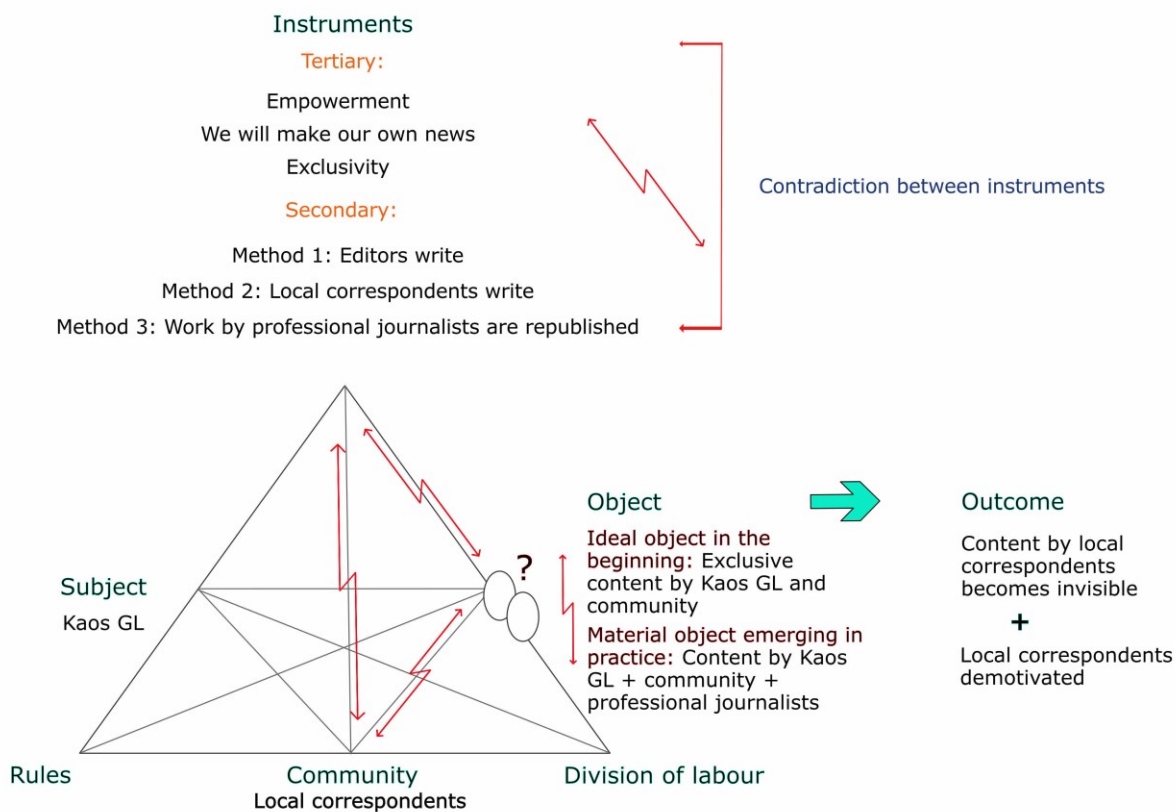
This principle of exclusivity starts to be applied to all work, regardless of whether it is produced by the community, the editors or external professional journalists.

Building a Publishing Policy: Interim Analysis I

This analysis concerns the publishing activity system. Although the publishing activity system is distinct from the training activity system, it has a direct bearing on the motivation of correspondents regardless of everything else that is being done within the confines of the training activity to encourage them to write. The object of the publishing activity system is news content. Figure 17 depicts the historically earlier form of the publishing activity system before 2017.

Figure 17

The Publishing Activity System Before 2017



Historically, there are three higher-level principles mediating the publishing activity system. As always, empowerment is at the top as an unchanging principle. The training activity system of the Media School analyzed earlier was a subject producing activity. Subjects are expected to take their position in the publishing activity system as writers. As Participant 2 notes: “our main goal in the Media School is not to train journalists from outside. It is to empower LGBT+ so that they can write their own stories.” Therefore empowerment carries over to all activity systems. The second higher-order principle is embedded in the original manifesto published by Kaos GL when the Local Correspondents Training was first launched. The first announcement for the training in 2007 is titled *We Will Make Our Own News* (Kaos GL, 2007). This is the higher-order principle giving direction to the activity. It means exactly what it says. The principle of exclusivity, which is the third higher-order principle, was mentioned by Participant 1 during the interviews. In the beginning there is a tacit intention for content to be exclusive. It is not openly and definitively declared as a principle. It is linked to the second principle and entails the understanding that content published on KaosGL.org news portal has to be content produced for the news portal. However, this initial tacit intent becomes more blurred in practice and does not function as a higher-order principle mediating the activity system in the early years.

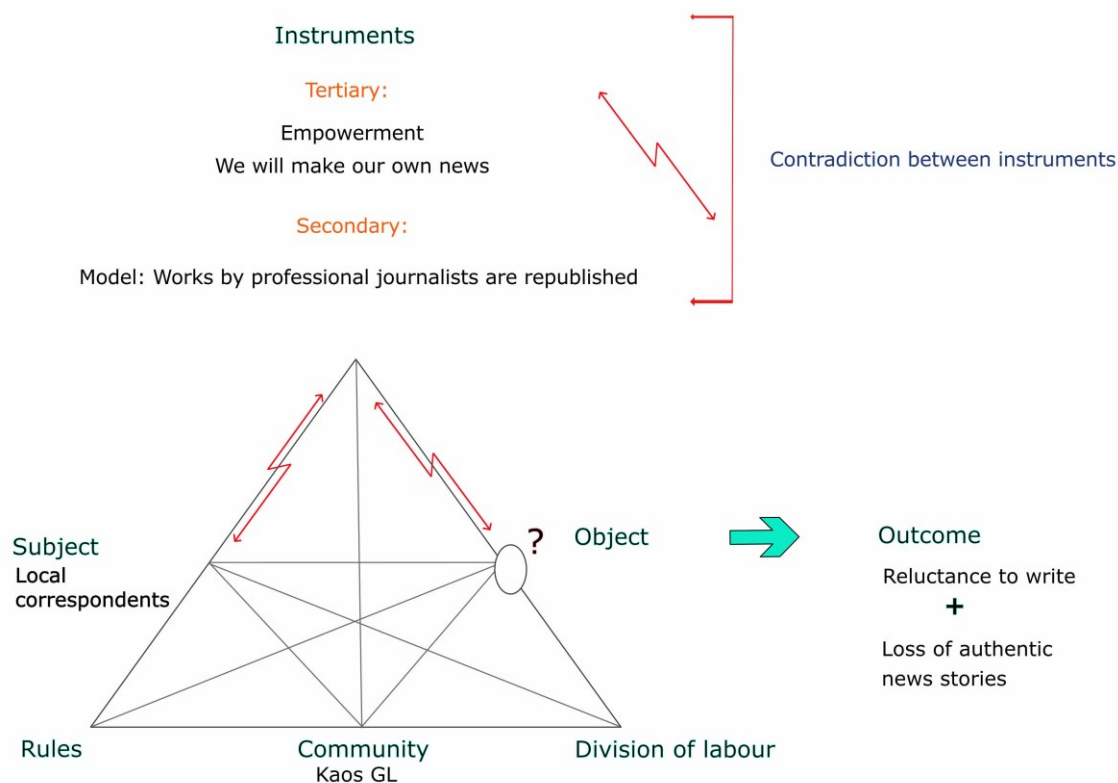
In an ideal system, all secondary instruments (methods and models) would require alignment with the higher-order principles so that a clear object can be constructed. In the beginning, the higher-order principles allow Kaos GL to construct the object *ideally*. The ideal object of the publishing activity system was constructed as *exclusive content produced by Kaos GL and the LGBT+ community*. For this ideal construction to turn into a material one, there needs to be secondary instruments in the form of methods and models. Two of the methods are in alignment with both the higher principles and the ideal object. These are very straightforward: Kaos GL editors will produce content and the community will produce content. However a third method arises in practice that contradicts the ideal construction of the object. Republishing works of renowned journalists contradicts the ideal construction of the object (Figure 17). It also contradicts the foundational principle enshrined in the original manifesto as well the principle of exclusivity. With regard to the principle of empowerment, there is nothing intrinsically contradictory between empowerment and republishing works by renowned journalists. However in a system of interconnected activities where young adults in the LGBT+ community are invited

to attend a training program and write their own stories, the work of these other writers proves to be disempowering. This is also closely linked to the number of such articles. The work of the community becomes invisible. Hence the established method of republishing professional works contradicts all of the higher-order principles. By extension, it leads to a contradiction between the community and material construction of object and a contradiction between the community and the instruments. Finally, the ideal construction of the object contradicts the material construction.

I will relocate the local correspondents in the subject position of the publishing activity system to depict the nature of the contradictions in their position (Figure 18). The empirical data for this analysis are the critique offered by a local correspondent during the evaluation meeting as reported by Participant 1.

Figure 18

Writing Actions of Local Correspondents in the Publishing Activity System



In Figure 18, when the local correspondent assumes the subject position in the publishing activity, they are performing the individual goal-directed action of writing. Here, the higher-order principle declares: *We will write our own news*. However, when the subject seeks a method or model about how to write or what to write, the most visible model appears in the form of the examples set by professional renowned journalists. In the absence of an explicit policy, the model of professional journalists becomes the implied policy. In this case, the works of these other writers functions as a mediating secondary instrument because they embody a policy even if it is not openly articulated as such. Just as explicit publishing guidelines would tell a writer “this is what you write and this is how you write it”, the works of other people serve the same function because they tacitly tell the subject how they should think about the object of their work. This is a contradiction between the method and the object of a local correspondent’s work because they are unable to construct the object of their writing. It is also a contradiction between their given status as writers and the method used in the activity system. In this example, it is not just the work produced by these professionals that is mediating the actions of local correspondents reporters. It is also their identity and the intensity of their work. An opinion piece by a famous journalist mediates the actions of a local correspondent both with respect to its content and with respect to the identity of the writer. In this particular case, it raises the bar and has a demotivating effect on the subjects.

Once Kaos GL makes a conscious decision to stop featuring articles by renowned writers published in other outlets, the mediating instrument is changed. It now predominantly becomes the work of other local correspondents—the work of peers. The work of the community starts to become visible. In this case, the new mediating instrument embodies a very different policy. It speaks to the local correspondents about what is expected of them. Participant 1 notes: “And naturally, when that profile changed, when this picture changed, people started to say, oh, that person is writing too. And then they saw a process where they could write based on what their peers wrote, and they started to write more.”

Kaos GL’s decision about exclusivity was final after the 2017 feedback and evaluation meetings. However, there was still a question about those specific instances where a professional external journalist wrote an article and there was a need to share it with the community.

Participant 1: [So we said] if X [name removed] writes an excellent piece and we decide we'll just die if we don't cover that on the news portal, then we can cover that in the form of a news report, we just say X wrote this.

As I noted, exclusivity is not just limited to opinion pieces by well-known journalists. It applies to all content. For example,

Participant 1: We used to take and republish interviews that Kaos GL gave in other places, or pieces written by Kaos GL staff in other places as well as the interviews Kaos GL gave in other places as an organization. We don't publish those anymore either. For example we say, H [name of staff removed] wrote an article, for example if H has written a piece for a newspaper. In the past we used to cover that as our own private content.

However, this turns out to be problematic in some instances because sometimes there are exceptions.

Participant 2: One of our writers sent me that link when we said we wouldn't be republishing pieces from other outlets. [They said] well you republish your own article. That wasn't something we had thought of. [...] But that was an exception. I hadn't thought of it like that.

I asked Participant 2 whether this was still ongoing: "We're much more clear about it now. I mean in 2018 we experienced things like that. We're much more clear about it as of 2019."

The secondary contradictions between the elements in the publishing activity system appear to be resolved in terms of content exclusivity.

Content Diversity and Framing

By the time KaosGL.org was launched as a news portal there was already a long history of publishing activity. Kaos GL Magazine had been around since 1994.

Participant 2: Kaos GL Magazine and KaosGL.org have a publishing policy. And that is to function both as a community publication, and by that I mean to give voice to LGBT+, and at the same time to maintain a political agenda and to discuss issues on a political level.

Juggling these two functions was not easy.

Participant 2: In the early years of the magazine there's a more anarchist orientation, the content is much more political. When the website is created and together with the establishment of the association, there is an orientation, an approach to enrich and strengthen this political background with human rights literature. And at the end of the day, what happens is that all of your content turns into: "no to hate!", and "there was a hate crime there", "no to this and that, this is political" and things like that. Well yes, it is extremely valuable. This is also how I would fundamentally summarize my own approach to news reporting. But the reader wants to see other things too.

This issue links to the earlier discussion I mentioned about participants of the Media School openly stating that they found the content in the news portal to be extremely depressing. These critiques were voiced during a training session and participants had noted that they would like to write about fun things. The contributors are also among the readership of the news portal so it is also about people wanting to read fun things. Participant 2 recalls past attempts to cover lighter topics in Kaos GL magazine by using genres such as the advice column.

Participant 2: It was attempted in the magazine from time to time like the column Dear Sister Gözüm, letters from readers and things like that. But at the time it's seen as a light thing...I mean, soap bubble. It's like, well our main issues are these things over here and while we're doing that let's just pull two soap bubble stories from foreign publications. That phrase was used a lot at the time: soap bubble. That's around 2013, 2014. It's like, let's just put that there and get it over with. And it was like, "Oh come on, are we really going to spend time with this when all these other things are going on?" And the saying was: "Are you combing your hair when the village is burning, queer?"⁵ In the Media School we learned that we must comb our hair when the village is burning.

After the 2017 feedback and evaluation meetings and the comments from local correspondents during Media School workshops, Kaos GL revisits its publishing policy not just in terms of exclusivity but also in terms of the type of content that should be featured.

⁵ Reference is made to a Turkish idiomatic expression.

Participant 2: People want to write things like this. They want to write the story of a day in their lives. They want to talk about their story of sexuality. They want to talk about partner sites. They want to write about Madonna's new album that they just listened to. If there's a new pop singer, they want to cover that. Even if it's not about LGBT+ they want to do something that excites them. This is what the Media Schools taught us. And we learned there that we need to give priority to these areas. And for that reason, that thing we used to call "soap bubble" turned into a section in its own right; it has its place in the task division among the editors. It turned into a section that one person keeps track of and gives importance to. And, at the end of the day, we started getting more clicks. [...] And then you look and see that a three-line Madonna album review gets five times more clicks than that painstaking interview you did with five different human rights organizations. So it means that people need this.

The inclusion of personal stories of LGBT+ as legitimate content in the news portal became especially important at the end of 2017 when governorships introduce bans on public LGBT+ events. I had mentioned these bans earlier when I gave background information about the climate in which Kaos GL operates. While government bans restricted LGBT+ events, Participant 2 noted that there was an increase in content submitted by the community during the period because people were now able to share their personal stories on the news portal. There was now a clear policy to encourage LGBT+ to write personal stories indicating that the day-to-day lives and personal stories of LGBT+ people and activists had news value in an environment where heterosexism and hate speech were so prevalent (Alpar, 2017).

The foregoing discussion was about content diversity. There is a radical decision to diversify content on the KaosGL.org news portal based on the needs of the community. Personal stories of LGBT+ are now more clearly regarded as news content. However this does not mean that anything can be written about anything that the community or the editors find to be important. There is also a radical shift in terms of framing news stories so that they are presented from an LGBT+ perspective. This too arises from the feedback and evaluation meetings held with local correspondents.

Participant 1: [They told us] I should be able to have access to issues I don't have access to in mainstream media. So, for example, they don't want to read an article about the

corona virus and its implications with respect to human rights. They want to read about how the corona virus situation in Turkey affects LGBT+ rights.

This critique was levelled against another established practice on the news portal. From the early years on, there was an understanding in Kaos GL that even if certain current events were not directly related to LGBT+ issues, they should still be covered because of their general significance. This was a tendency arising from the highly political characteristic of Kaos GL magazine and Kaos GL Association since its inception. However this policy resulted in a medley of news content. A public statement by the leaders of the ruling or opposition parties would be published if they were regarded as significant. A public demonstration on climate change would be covered. This was something that came from a tradition of political publishing: things that were not related to LGBT+ issues should still be shared with the LGBT+ community to inform them.

Participant 2: In 2017 we radically said we will not do this anymore. And if we do it, I mean if it's our friend and they took part in a rally on climate change, we will ask whether they were carrying a rainbow flag. If they weren't, we won't cover it. And so we had a whole range of conflicts with people because they were used to this. They would say, well we support you why don't you support us here. But no, this news, this site has a publishing policy, we're publishing LGBT+ related news. I mean yes, the gold mining in Bergama is very important for example and there are a lot of places that are covering that. But as long as we're not looking at that from an LGBT+ angle, we will not cover it as a news story. For us to turn that into a news story we have to see a rainbow flag there or a banner or the experience of an LGBT+ activist. We need these kinds of things. And that lead to a qualitative leap for us.

The year 2017 marked a radical change in Kaos GL's publishing policy for the news portal. The structural changes introduced to collect feedback from the community were enabling more open discussions. The feedback from voluntary reporters as well as Kaos GL's own observations were discussed in detail during the one-week annual summer camp organized for Kaos GL staff in 2017. A summary of the decisions adopted during the summer working camp were shared with the community on the news portal (Kaos GL, 2017). In addition, among the

staff, there was now a clearly articulated decision to prioritize news content either about LGBT+ people or viewed from an LGBT+ perspective.

In the same period other practices were questioned. For instance, KaosGL.org editors abandoned the practice of directly sharing content from other LGBT+ web sites and blogs. This was abandoned on grounds that it does not lead to a good news story. Instead it leads to a mess:

Participant 2: I mean if we're making an effort to make news, we can give a link to that website and promote it. We can do something extra. Let's do something extra. And by the way [...] everything we said was extra work. I mean, you're also shooting yourself in the foot. Otherwise, you can just copy/paste and get it done.

This last example is relevant for both content exclusivity and content framing.

At first, it was somewhat difficult to shift to this new practice. There were internal disagreements about what should be covered on the news portal. The new policy took some time to settle but it was eventually accepted. Participant 2: "And we also took care to remind each other. It was like, look we said we would do this. Reminders... I mean it was all solved along the way." It is also important that in 2017 the group which was previously called the Media Team became a program in its own right. It was now called the Media and Communication Program and the people who were responsible for the news portal had more initiative to make decisions about the implementation of the publishing policy. The decision-making process became easier and faster. Extensive email and WhatsApp discussions about what to do with a particular piece of news gradually diminished. Participant 2: [So it turned into] "are we publishing this?"... "No, love, let's not, because...and here's why. That's it! So, pages and pages of texting turned into this. And I think that's a good thing."

Hence, clarity about the publishing policy led to a significant change in the internal communication and interaction among the staff. Relations with local correspondents also changed.

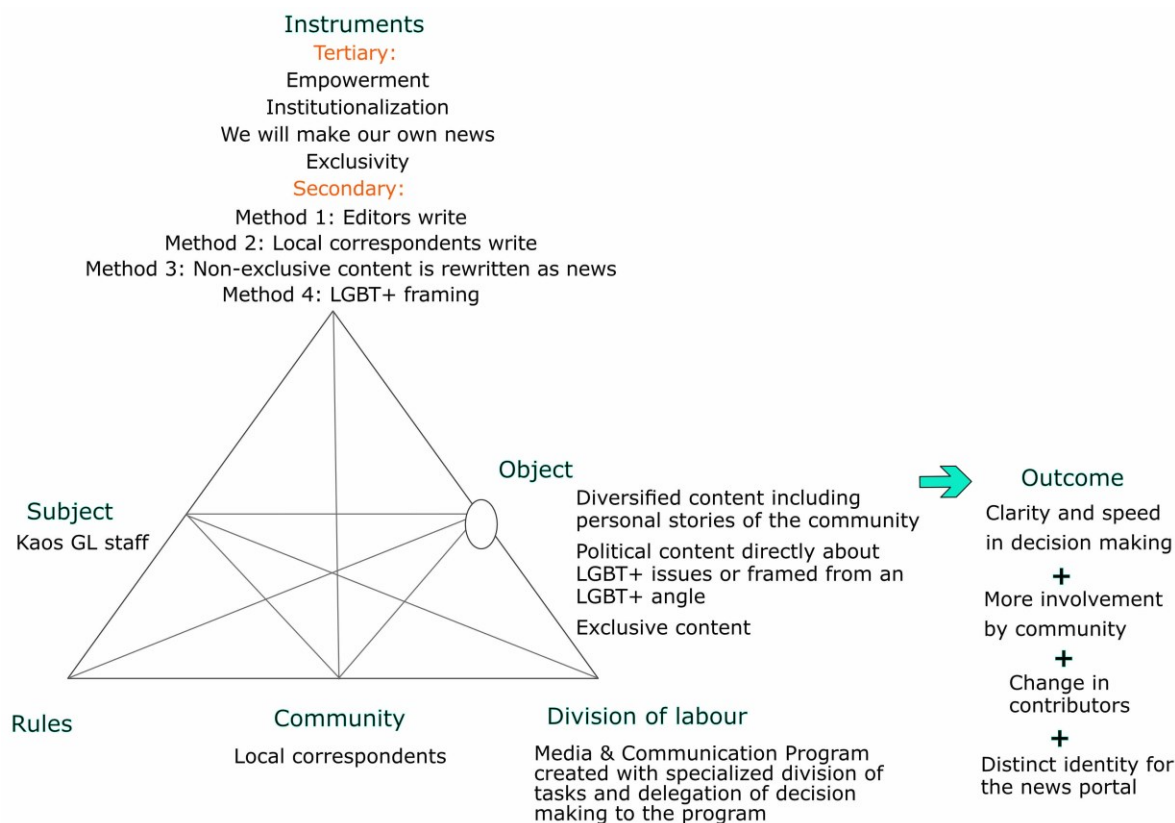
Participant 2: What happened there was that some correspondents stopped writing for us. Because some correspondents were actually not writing about LGBT+ issues. But I think that turned into a good thing because it enabled those people to develop self-awareness about how they were relating to LGBT+ issues. And I don't see that as a loss. I mean,

they can continue to write about those other issues in other places and they are writing. And it is good that they're also acknowledging that they learned this or that in Kaos GL's Media School. But those correspondents, they now learned that if they write about LGBT+ then they can send it to Kaos. That turned into quite a fortunate thing. And new correspondents started to come in because of that. I mean, a lot of people who were afraid to write because they saw Kaos as an extremely political, extremely serious place started to write. I mean the idea that "oh, I can write here" started to emerge.

Building a Publishing Policy: Interim Analysis II

I noted earlier that the decisions about content exclusivity resolved the secondary contradictions depicted in Figure 17. This clarified the object of the activity system (news content). The object was now exclusive content produced for the news portal written by Kaos GL staff, the LGBT+ community and other journalists who chose to write a piece exclusively for the news portal. In the foregoing, there is further clarification of the object of the activity system. On the one hand the object is diversified. Personal stories are welcomed. Fun news is taken seriously and the horizontal division of labour is adjusted accordingly. There is now a person specifically responsible for editing this kind of content from contributors. New division of tasks and focus on the news portal is taken further when the media team starts to function as a program in its own right. Kaos GL Association conducts its operations under specific programs. In 2017, the Media and Communication program was established as an extension of institutionalization. This, in turn, is made possible when Kaos GL starts to have access to more funding. The decision to coordinate activities under programs was adopted in the early years. As access to funds increases and as the work load involving the Media School and the news portal becomes more intense, these activities are brought together under a separate program with responsibility shared among a dedicated team of editors.

The object becomes further clarified with the introduction of framing. Content now has to be either directly about LGBT+ or framed from an LGBT+ perspective to be featured on the news portal. These changes lead to change in the community of contributors as writers. People who did not write from an LGBT+ perspective stopped writing and space was created for new people. Figure 19 depicts the new publishing activity system after 2017.

Figure 19*The Publishing Activity System After 2017*

At this historical point, the secondary contradictions of the publishing activity system, which I reported above, appear to be resolved. I will return to this discussion to address the changes in some higher-level principles in the publishing activity. However, before the higher-level analysis, additional issues need to be addressed.

Repeated Questions and Disturbances

The narrative segments above focused primarily on the changes that were introduced after feedback and evaluation meetings with reporters. These meetings were a turning point for Kaos GL. The issues brought up by local correspondents lead to an overall policy change in the publishing activity. However, there was still a need to develop specific publishing principles to guide the day-to-day operations and decision-making process of the editorial team. In what follows, I present some of the recurring issues that lead to the development of Kaos GL's publishing principles. I do not depict these disturbances in graphic form because they all have to

do with the needs for a practical instrument to shape the object of the activity system. All of the narrative segments below involve the publishing activity system and its object, which is content. All of the issues reported below concern a need for an instrument, which is gradually developed. The segments reported below concern questions such as: Which content from local correspondents should be featured in the headlines? How can a distinction be made between Kaos GL as an association and the Local Correspondents as a voluntary formation of contributors? To what extent should content submitted by local correspondents be edited? What should be done with anonymous allegations of violence when there is a request to cover these as news stories?

The question of what gets featured as a headline on the news portal started to cause tensions. The website for the Kaos GL news portal is divided into two sections (

Figure 8). One section features the headlines for that day. The other section is titled the Rainbow Forum and features articles by members of local correspondents. For a long time there was no clearly articulated policy about which news stories chosen from the Rainbow Forum would be carried over to the headlines section. This caused some criticism as local correspondents began to question whose content gets featured in the headlines section. There were complaints that content with particular political orientations or people were being favoured over others. There was a need to differentiate between the content of the community and the content produced by Kaos GL as an organization.

This issue also linked to the individual political orientations of the community members. The Local Correspondents Network does not represent a homogenous political orientation. The news portal was important in giving voice to the community. Kaos GL was encouraging people to write but this did not mean that they were aligned with people's political views. It was important to have some mechanism to show that Kaos GL News Portal did not necessarily subscribe to the views of contributors. This issue was resolved by introducing a disclaimer at the end of articles written by the community to indicate that their views do not necessarily reflect the views of Kaos GL. The disclaimer, which is now placed under all articles by voluntary reporters reads: "The articles published in KaosGL.org Rainbow Forum are the responsibility of the authors. The publication of these articles on KaosGL.org does not imply that the views expressed

therein reflect the views of KaosGL.org” (e.g. Yıldız, 2020, last paragraph). However, this notice by itself was not sufficient to mark the distinction between news written by the editorial staff which were binding on the organization and news written by contributors. In 2019, when the website was being revamped, a second major decision was made to clearly separate the content of the Rainbow Forum and the headlines section of the news portal. The headline news stories are featured inside a carousel on the upper half of the home page of the news portal. The Rainbow Forum pieces are located right next to the carousel but they are a distinct section. The Rainbow Forum would still be reserved exclusively for articles by contributors. The headline news stories would only include content produced by the editorial staff of Kaos GL or works commissioned by them. This also indicated a legal distinction. It meant that in cases where Kaos GL staff wrote articles expressing their own personal opinions, those too would be published in the Rainbow Forum but they would not be carried over to the headlines section just because they were written by Kaos GL staff.

For a long time, there were repeated hesitations about how to edit content submitted by voluntary reporters. In the early days, when content submitted by voluntary reporters was limited, Kaos GL staff had time to discuss what to do with it. They also edited these submissions extensively. There would be no interference in the political stance of the content but there would be comprehensive editorial interventions.

Participant 1: In the past, when we had energy, we would take hours asking ‘should we do this, should we do that’... Sometimes you make such large-scale editorial changes that the person who wrote it no longer feels it belongs to them. Sometimes you even feel you own it more than they do because it turns into something entirely different from what they wrote.

The publishing principles address this issue. Extensive changes are not made in the content. Instead, contributors are now provided with information about the overall expectations as well as the language and principles that need to be followed when writing.

Anonymous allegations of violence and discrimination started to increase over time. From the beginning Kaos GL news portal made a point about publishing news reports about homophobia, discrimination, heterosexism and violence experienced by LGBT+ people. However, this started to become problematic in concrete cases when people sent actual stories of

the violence they experienced, not in the form of news reports conforming to journalistic principles but rather in the form of allegations and disclosures without their names. The only way to publish these stories was to cover them as claims, which introduced other problems. There were multiple issues surrounding these texts. There would be issues of privacy. Some could not be verified. In some cases it was not a good idea to publish a story without the name of the person who was experiencing the violence or the discrimination. Participant 1 reports one of the early cases of these allegations.

Participant 1: For example, on that occasion we used the advantage of not just being a media organization. Because we are not just a media organization. Like I said earlier about our efforts to develop activism through other programs. We asked ourselves whether KaosGL.org should really be the first place where a victim of violence should go. I mean, we need to have another functioning mechanism through which we can support this person about the discrimination and the violence they experienced. And we decided to act from there. But when you come across something like this, you sit and you think about what you should do.

At the time, there was no clear principle about how to address these issues in terms of news reporting. However, the approach started to emerge in discussion:

Participant 1: So we should, above all, do something about the person's psychological health and physical integrity, their well-being. That's the first thing we should address. If, after we provide that support, if that person still wishes to turn that into a news story, then we can return to the question and discuss it again. That is what we thought. And we also told them this. We said, this is the first time we've received something like this and we do not know what kind of principle we should be applying here and we would like to candidly share that with you. But Kaos is not just a media organization. We provide counselling services, so if you'd like we can refer you to psychological support or other professional support services. So, for example, when you get back to them in this manner, the other person shows greater understanding than we expect.

The process of determining the institutional response to such cases begins upon the emergence of concrete cases. However, it requires a second step.

Participant 1: The other person usually thanks us. I mean we never had any adverse response. But after that we really did sit down and develop principles about how we're going to relate to situations like these. I mean, we don't do...we don't do what human rights organizations or women's organizations usually do to us. Like, "well, we don't have a principle about that, come back two years later." We take note of these to discuss them at the next stage, the first moment we meet. We talk about what we're going to do.

These repeated issues start to push forward the process of developing the publishing principles.

Participant 1: Also, when we took out those things...when we moved away from people who were producing content for mainstream media and started to produce content ourselves and also to support others in producing content, the publishing principles became much more...much more urgent for us.

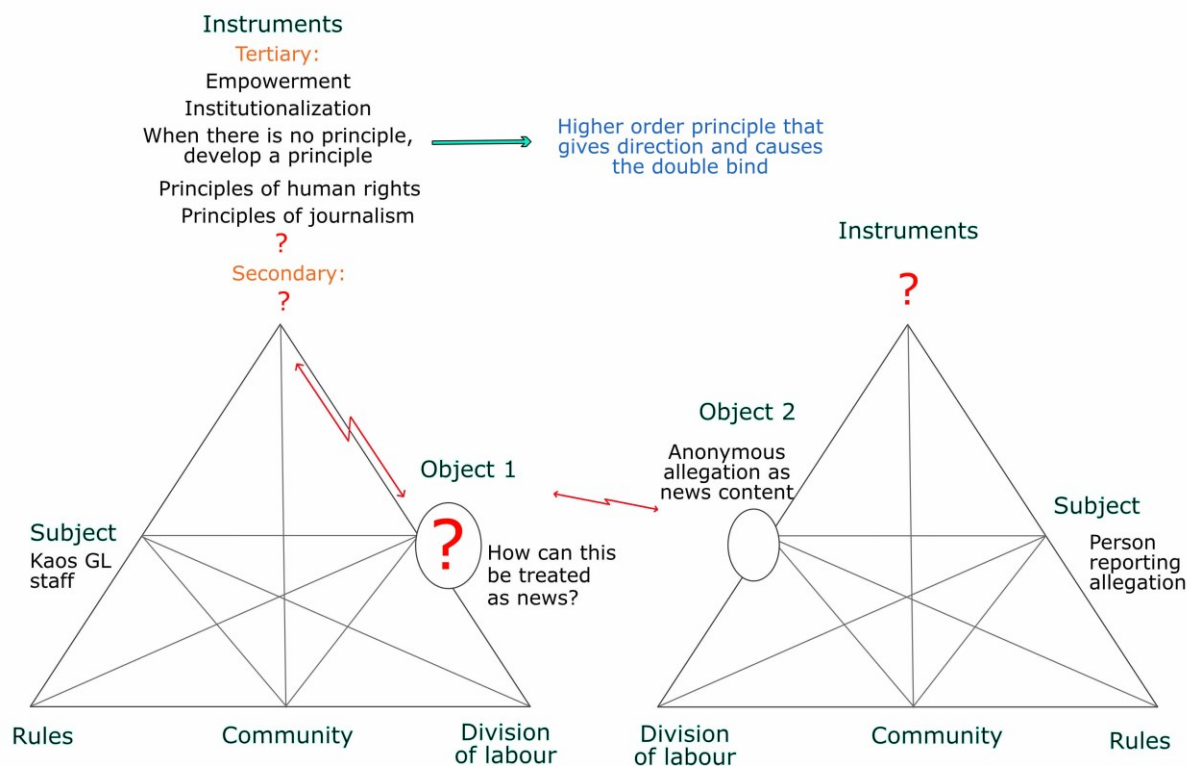
Building a Publishing Policy: Interim Analysis III

As I noted earlier, each of the disturbances under the preceding heading involves the lack of an instrument. In each of them, there is a decision that needs to be made and no predefined method or model or principle to guide the process. I mentioned earlier that Virkkunen and Newnham (2013) underline Vygotsky's observation about how a subject experiences hesitation when confronted with the first stimulus. In the cases I reported above, the first stimulus is the subject matter or phenomenon that calls for decision-making. The authors note that this hesitation "continues until the subject *finds and adopts or constructs* [emphasis added] a second stimulus. The second phase of actuation is characterized by the subject's determined, agentic action." (Virkkunen & Newnham, 2013, p. 47).

In the case of Kaos GL, the second stimulus, which would organize the collective mind, the collective agentic action, needed to be constructed in the form of publishing principles. For the purposes of this study, it is critically important to examine the response given to the situation in the last example involving anonymous allegation reports of violence. This particular disturbance was one of the two instances that appeared as a double bind in the interview transcript. Double binds, which are one of the categories I used for coding the disturbances in the interview data are described as "processes in which actors repeatedly face pressing and equally unacceptable alternatives in their activity system, with seemingly no way out" (Engeström &

Sannino, 2011, p. 374). The articulation of these situations by practitioners is regarded as critical for the expansive learning process to proceed (Engeström, 2015). The troubles in decision making about anonymous allegations become repeated because the number of such allegation reports starts to increase.

In this example, the *content* or the situation of an anonymous allegation is brought to the attention of Kaos GL by a third person who has constructed the situation as news content (Figure 20). Therefore the other individual's object construction is relatively straightforward. When Kaos GL directs their attention to it, it cannot be constructed as news content because there is no principle or method to assist in doing so. Moreover, the object contradicts the higher-level principles of human rights and journalism. The questioning by the staff also points to a contradiction between the object as a news story and the principle of empowerment. Their question is about whether it is really empowering to construct this case as news content. In addition, there is a contradiction between the construction of the object by the holder of the allegation and its construction by Kaos GL. However, despite these, from the early days on, Kaos GL makes a point about publishing news reports about homophobia, discrimination, heterosexism and violence experienced by LGBT+ people. A decision to refuse publishing the content appears to contradict this principle.

Figure 20*Decision-Making Actions About Anonymous Allegations*

Note. The figure depicts the decision-making actions in the publishing activity system in the face of anonymous allegations.

At this point, the double bind arises in an intricate way. It is not just options that are imposed from the outside that are incompatible with one another. It starts with the proposition: “we cannot publish this; it is unacceptable”. It goes on with: “we cannot refuse to publish it and not say anything; that is also unacceptable”. It continues: “we cannot refuse to publish it and not give any other support to the individual; that is unacceptable”. And finally: “we cannot refuse to publish it and not have any principles; that is unacceptable”. The source that causes the double bind are principles that Kaos GL have adopted for themselves. They are not imposed from the outside. The principles that are operative arise from Kaos GL’s own history of interaction with other organizations where the development of such principles is neglected. Hence, a very high

order principle comes to the forefront as a tertiary instrument to organize the minds and activities of the collective: *When there is no principle, make a principle*. The entire working of the double bind in this example is ethically charged. There is nothing from the outside that requires Kaos GL to make an explanation to the holder of the allegation about why they cannot publish the content. There is no requirement from the outside that obliges them to develop an institutional response the first chance they get.

When Engeström (2015) appropriates the concept of the double bind from Gregory Bateson to develop the theory of expansive learning, he refers to a metaphor used by Bateson. The metaphor is in the context of a Zen master pushing the pupil to rise above context: “If you say this stick is real, I will strike you with it. If you say this stick is not real, I will strike you with it. If you don’t say anything, I will strike you with it” (Bateson, 2000, p. 208). And Bateson argues that the pupil needs to rise above the context, for instance, by reaching up and taking the stick. This is the metaphor that encapsulates the spirit of the double bind. It requires rising above the context.

In the example, the “rising above” happens when Kaos GL makes the person into the object of their overall activity instead of taking the person’s story as the object of their publishing activity. They reposition the individual outside the confines of the publishing activity system and address it in an entirely different manner. This kind of repositioning outside the leading activity was observed in Section 1 when Kaos GL created an additional activity system to give technical support to activists and organizations outside the activity system of the Local Correspondents Training. Participant 1 is referring to this when they say: “Like I said earlier about our efforts to develop activism through other programs.”

Once again, the law of requisite variety has explanatory power in appreciating the nature of the response given in this situation: “the regulator has to have at its disposal a greater variety of different ways of impacting the regulated than the variety of the possible states of the regulated.” (Virkkunen & Newnham, 2013, p. 41). When applied to the example, this basically means that in the face of all the possible states of content that may come one’s way in the publishing activity system, there needs to be a variety of ways of dealing with them. In this instance, the variety is offered by taking the situation outside the context of the publishing activity and no longer treating it as news content. In addition, a clear clause is developed and

enshrined in the publishing principles explaining that Kaos GL does not publish anonymous allegations of violence on grounds that such reports require a meticulous process of follow-up, which is outside the domain of the news portal.

The second double bind in the data concerns repeated difficulties in selecting and editing content from local correspondents. The question of how to choose content becomes even more important in the context of transferring knowledge of editorial activity to newcomers. Participant 1 notes that when new people started to work at Kaos GL as full time editors, there was an urgent need to develop a shared understanding of how to approach editorial activity.

Participant 1: That individual should not be perceiving this issue as a personal and subjective one. Neither A [name removed] as the person writing the article, nor B and C [names removed] as people who give editorial support to the article should see it like that. And in all of these matters we started to encounter small problems. We had problems both in editorial practice and also with the reporters who had written the news stories.

This narrative segment points to a topic I addressed in Section 3 about objectification. In Section 3, I had noted that the pedagogical practice of the Media School was not objectified because the need for objectification did not arise explicitly due to people who had a tacit shared understanding of how training should be organized. In this last example, Participant 1 is pointing at the need to develop a shared understanding as well as the need to objectify the shared understanding in written form. The publishing principles are developed and enshrined in writing to allow sharing both internally and with the contributors.

The repeated disturbances I reported above and the feedback from the community trigger the process of developing specific publishing principles so that an institutional response can be established. Below, I give an account of this process.

The Publishing Principles

It took nearly two years between 2017 and 2019 for the publishing principles to be developed. A systematic analysis was conducted by the editorial team with the help of an external academic with a background in communication studies. The publishing guidelines and ethical principles of major media outlets in Turkey were examined. Texts developed by journalists' associations were studied. The editorial codes of major international newspapers

were examined. The principles of international LGBT+ news outlets were studied. In addition various documents produced by Kaos GL were examined from the perspective of news reporting. For example, guidelines against hate speech in the media, guidelines for journalists, guidelines about LGBT+ people. All of these materials were compiled. The expert was asked to prepare a draft text of key principles. The draft document was kept on a shared internal drive. It was open to comments by Kaos GL staff.

Although various existing documents were consulted, the development of the guidelines was based primarily on practical considerations. It was not about an abstract notion of what publishing principles should look like. Instead concrete cases of submissions from the community were compiled and checked against the principles to understand what specific problems were being experienced. This was an attempt to verbalize exactly why a submission was unacceptable. For example, with respect to submissions of anonymous allegations I reported above:

Participant 2: We don't publish these. But to answer the question of why we don't publish them, we started to record every single anonymous allegation report we received; if we didn't publish it, what did we say about it? We then turned those [responses] into a principle.

In an effort to enable the updating of the principles and to check whether they truly serve to facilitate editorial work, Kaos GL editorial staff still continues to keep records of content which they find problematic or which they have rejected:

Participant 2: [We ask] are these principles useful? To what extent are they useful? [...] What kind of decision did we make here? Did we make the right decision? Can we turn that decision into a principle? [...] and to update them once a year, we compile cases that we come across that the document doesn't sufficiently cover and we try to share it with one another.

The publishing principles were finalized and also featured as a news article on KaosGL.org in February 2019 (Kaos GL, 2019a). This is a 1000-word document establishing the general principles of editorial practice, the language to be used, the choice of visuals, the choice of news content, how LGBT+ activities will be covered, how human rights violations would be covered, how news stories of suicides would be covered, etc. At the end of the text, there is a

section about anonymous allegations, which states that these will not be published as news stories due to the requirement to conduct a meticulous follow-up procedure. The last sentence of the document states that the publishing principles are an open document and will be updated as needed (Kaos GL, 2019a).

Participant 2: But for example on that point, there are a lot of things we don't agree on. [...] For example M [name removed] likes to have a principle for everything. [...] But I always have questions about it. You may not be able to turn everything into a principle. This is good because it means that these principles aren't done just because we sat down and wrote them. It means they're something we have to keep working on.

[...]

You can develop as many principles as you want, in publishing there will always be an exception to it. And in LGBT+ publishing, there will definitely be an exception, definitely.

Together with the publishing principles, Kaos GL developed a brief for contributors. This document gives contributors information about the editorial process that follows after a submission (Kaos GL, 2019b). It gives practical information about how to send articles. In addition, it walks contributors through the editorial decision-making process. It gives information about what kinds of editorial changes are made and what principles are followed. The information note also provides a link to the publishing principles.

Building a Publishing Policy: Interim Analysis IV

Kaos GL's publishing principles are a consciously generated instrument used in everyday practice in the publishing activity system. But before analysing the actual process of their development, it is important to first revisit why this type of instrument is highly significant in the process of expansive learning.

The expansive learning process can be described in a number of ways depending on which aspect we are focusing on. From one angle, it can be described as a process of joint creative problem solving (Virkkunen & Newnham, 2013). From another angle, it is a process of concept formation – a process where a new concept is developed and implemented in activity (Engeström & Sannino, 2010). It is also described as a process of instrument production, or

rather, a process of producing an instrumentality, which corresponds to not just one, but a constellation of instruments (Engeström, 2018). From yet another angle, it is a process of successive resolution of the systemic contradictions in a system (Engeström, 2008). And, again, it is a process of designing an interaction (Engeström, 2018).

In this discussion, I would especially underline this last aspect which focuses on expansive learning as designing an interaction, not because it captures all of the other aspects but because I find it captures an essential aspect of the publishing principles that may go overlooked if we only speak in terms of concept or instrument development. The publishing principles are indeed an instrument, in this case a method to guide decision making by editorial staff and writing by local correspondents. They are, once again a conceptual instrument of labour, which was produced by labour and are used again in labour to produce content. The principles are also a complex of concepts. However they are also an objectification of an interaction. Activity theory is about just what it says. It is about activity. Kaos GL's publishing principles may have been finally objectified in the form of distinct written documents, but they are most substantially objectified in everyday activity. I find it useful to take a moment to step away from visualizing the publishing principles as a series of words on paper and think about them as activity, as interactions in everyday life. The interview data show that there is a recognizable difference in the everyday actions of people before the publishing principles compared to after. Participant 2 noted the ease with which decisions were now made by reference to the principles. The interactions between Kaos GL staff change in terms of what they talk about, how long they talk about it, the way they talk about it. The interaction between the editorial team and the contributors change. The interaction between the staff and the object of the publishing activity (content) changes. When a new piece of content is received by the editorial team, it is not treated with the same hesitations as before. There is now a reference point, an instrument that is used to decide what to do with it. In this sense, the publishing principles do not just guide the activity, they *are* the activity.

I noted above that the publishing principles were objectified in the form of written text. In this instance, because of the dire need to share the understanding with other people, both internal and external, the objectification of the principles becomes a priority.

I find it important to revisit once again another aspect of what a mediating instrument/artefact is all about. For Vygotsky (1978), the mediating artefact is conceptualized as something that regulates human behaviour; the subject uses it to work on their own mind so that through it, they can regulate their actions to work on a task. Virkkunen and Newnham (2013) note that Vygotsky primarily focused on situational mediation and remediation of individual subjects. They argue that in collective activity systems, we are looking at the regulation and coordination of more complex and long-term activities. In the case of Kaos GL, the second stimulus that had the capacity to tell the editors how to *perceive* the content, how to *choose* the content, how to *edit* the content, in other words, how to voluntarily *regulate* all collective behaviour concerning content had to be constructed with a shared understanding. The principles were collectively developed through collective analysis of real problems and objectified as text to voluntarily regulate interactions between people and between people and content. In this way, they do not only function as high level principles. They were collectively designed as real methods anchored in every-day activity based on real problems in every-day activity. Participant 2 stressed the effort that went into these principles as follows: “what we express in that text in two sentences has two years of blood sweat and tears behind it”.

One of the fundamental conceptual questions I mentioned both in the Introduction and the Literature Review of this study had to do with what kind of learning we are talking about in expansive learning. I had noted that Engeström (2015) conceives of learning not as transformation that takes place in the heads of individual people. Expansive learning is not about intellectual transformation at a personal level. It is about the transformation of the constituent elements of the activity system and the relations between them. The subjects are only one aspect of the activity system and are transformed to the extent their relations are transformed. The publishing principles, as an instrument, transform the relations in the activity system. The transformation cannot be explained with the transformation of a single person.

The question of whether a principle can be developed for everything is interesting for the purposes of this study. It is a question that involves requisite variety and the capability of the instrument. The comments of Participant 2 can be rephrased as follows in the form of a question from the perspective of requisite variety and instrument capability: Is it possible to develop an instrument that has the ability to respond to all the different states of the object? I will start by stating the obvious. If the instrument, such as a set of publishing principles is taken as a list of

categories under which different types of content can be fitted, then the answer is obviously no. This is against the theoretical position of activity theory, which is premised on the idea that the nature of reality is change. The object will change and one single instrument in the form of a classification scheme cannot capture its varied reality. This obvious fact is also recognized by Kaos GL who have indicated that the publishing principles will be updated as needed. It is a living document.

The next question would be: Is it possible to observe and capture emergent regularities and express them in the form of generalizations that can eventually take the form of a principle? This is what Kaos GL have accomplished with the existing principles. The observed regularities are expressed in the form of generalizations. However the final question is about the extent to which generalizations can cover the reality of the object. I find that this question can only be answered by stepping outside and above the publishing principles and shifting the focus to higher-level principles and visions. There are two instances in the interview data where a change in object was captured by a response outside the immediate activity system. This course of action is also a principled response. For instance, in terms of the publishing activity system, an open, negotiated decision-making procedure about instances when the principles fall silent in the face of new content would also be a principled response. It would be a principled response as long as it follows the higher-order principles that guide Kaos GL's overall work and not just the publishing activity.

Building a Publishing Policy: Concluding Analysis

For the concluding analysis in this section, I need to step outside the triangular representations of specific activity systems. I find that the representation of the activity system has been useful for identifying some of the secondary contradictions in the preceding sections. However, the discussion here applies to broader principles and the representation of one specific activity system is not useful at this point. I will still keep the discussion within the framework of object-oriented mediated activity as the main theoretical framework guiding this study.

The development of Kaos GL's publishing policy and publishing principles demonstrates a conscious process of instrument production and objectification. Generating new instruments is a vital aspect for creating a new practice because it is through the instruments that people shape their work (Engeström, 2015). Each of the secondary contradictions I have reported in this

section appear to be resolved within the publishing activity system. The specific type of news content that will be featured on the news portal is now clarified. In addition, the object is expanded when content diversity is introduced as a publishing policy. However, I will argue that there is a remaining higher-level contradiction that remains unresolved.

I have underlined multiple times that *empowerment* is the cross-cutting higher-level instrument guiding all of Kaos GL's work. This principle is operationalized in a variety of different ways. The current study only focuses on the work around the Media School and Kaos GL News Portal. However these are not the only activities of Kaos GL. In Section 1, I mentioned that empowerment was operationalized as empowerment through technical support. In the Media School and Kaos GL News Portal, empowerment takes the form of empowerment through equipping the community with the knowledge and skills to write. It takes the form of empowerment through informing the community of current political events as well as the activities of other LGBT+. It takes various other forms such as empowerment through socialization, empowerment through offering spaces and methods for participating in policy development, etc. For the purposes of this discussion I would like to focus on the operationalization of empowerment as *informing the community*.

As the participants have noted, in the early years of the news portal, there was an approach to inform the community of all topics found to be significant. This was due to the highly political stance of both Kaos GL Magazine and Kaos GL News Portal. Content of political nature would be shared even if it had nothing to do with LGBT+ issues. This would take the form of giving information about major political developments, sharing significant pieces written by external journalists, sharing the activities of people who support the LGBT+ movement, sharing almost anything and everything done by individuals in the LGBT+ movement. Based on feedback from local correspondents and Kaos GL's own reflection on its activities, this broader notion of *informing* was abandoned. There is now a policy to publish content that is either framed from an LGBT+ perspective or content that reflects the personal stories of LGBT+ people. In this way, Kaos GL News Portal is able to assume its own identity. From one angle, the introduction of diversity through personal stories broadens the object of publishing. The introduction of LGBT+ framing focuses the object of publishing. However, as noted by the interview participants, a wide array of content is thus left outside the publishing activity. People who used to write no longer write. Content from other outlets is not shared

unless there are exceptional circumstances. I should underline that the earlier practice can no longer be reintroduced into the publishing activity. If it is reintroduced, it will bring back all of the secondary contradictions depicted in Figure 17. However, the original conceptualization of empowerment through informing appears significantly narrowed. When the two aspects of the vision of empowerment caused contradictions in the publishing activity system, the secondary contradictions between the vision and the object were resolved by pushing one aspect of the vision of empowerment out of the activity system. I will argue that although this resolves the contradictions in the publishing activity, it does not qualify as a resolution of a contradiction at a higher level. It qualifies as a preference towards one aspect of a higher-order vision at the expense of the other aspect.

My interview data give me very little access to the exact nature of arguments in support of featuring other kinds of content on the news portal. Participants have indicated such things as the economy of effort of pulling ready-made content from other sources but they have also noted that there were disagreements and that they had to remind each other to abandon some practices. They have also noted that if they found content to be important, they would publish it in the form of their own news story. These comments give me very little grounds to make a detailed argument except to say that the justifications for wider coverage do not appear to be only a matter of economy of effort. They are justifications that have to do with the broader vision of the form empowerment should take. These justifications should be revisited and the contradiction that is pulling the higher-order vision in two directions should be resolved outside the publishing activity system. Resolving the contradiction outside the publishing activity system literally requires a new model/method of knowledge sharing—a model that can no longer be accommodated by Kaos GL News Portal because of its distinct publishing policy. Kaos GL's formula to make a news story out of content published elsewhere is a creative model to solve one aspect of the contradiction. However this is a limited model that offers some flexibility only within the publishing activity. It does not appear to have the flexibility to address all kinds of content. The model/method of operationalizing one aspect of the higher-level vision appears to work very well within the confines of the publishing activity. Additional models/methods are needed to operationalize the other aspect and resolve the contradiction. This requires moving above and beyond the publishing activity system in a manner similar to what Kaos GL has done in other instances.

To illustrate a complementary model of knowledge sharing, I will return to the example of a dedicated private forum space for the Local Correspondents Network. I must stress that this is an illustration. It is not a recommendation. An activity theory analysis equips us with the concepts to recognize that some kind of a new model/method might be needed, but *it does not tell us what specific form that model/method should take*. This is exactly why Change Laboratory sessions are organized to bring practitioners together so that they can design these models themselves (Virkkunen & Newnham, 2013). Therefore it would be against the foundational principles of my theoretical framework if I dictate the specific form. Moreover, one of the major criticisms Engeström (2011) levels against design-based research is that it positions the researcher as the designer of solutions thereby depriving the community of their role as a source of agency and novelty. The same understanding is reflected in the following passage from Kaptelinin and Nardi (2012):

Activity theory is a clarifying, orienting framework. It is not a “theory” in the traditional sense in which theory is understood in natural sciences. Activity theory does not support creating and running predictive models which only need be “fed” with appropriate data. Instead, it aims to help researchers and practitioners orientate themselves in complex real-life problems, identify key issues that need to be dealt with, and direct the search for relevant evidence and suitable solutions. In other words, the key advantage of activity theory is to support researchers and practitioners in their own inquiry—for instance, by helping to ask right questions—rather than providing ready-made answers. (pp. 6, 7)

Following these principles, some questions for consideration could be formulated as follows. Can an organized and well-managed dedicated forum space for the community serve as a space to introduce discussions around content that cannot be featured on the news portal or Kaos GL’s organizational social media spaces? Could the introduction of different types of content that are seemingly unrelated to LGBT+ issues trigger conversations around how they might be framed from an LGBT+ perspective? What would be the effect of bringing together different members of the Local Correspondents Network through discussions around their work? What would be the benefits of connecting local correspondents who write about topics not related to LGBT+ issues with those who do? Would it be possible to use the discussion forum in this manner to stimulate co-authorship projects either critiquing other work or building on it? Can political concepts seemingly unrelated to LGBT+ issues be discussed and enriched with a

focus on specific pieces written by external journalists? Can new arguments be generated collectively around these texts? In short, what would be the pedagogical advantages of a model of interaction where people can share content that inspires them without being confined by a specific publishing policy?

The success of Kaos GL News Portal and the renewed engagement of the community is an opportunity to take creative discussions further. It should not be confined to its own success.

Section 5: Concluding Analysis: Findings and Research Questions

This section brings together the four separate analyses presented in the preceding sections. In this part of the analysis I will be working with the model of the expansive learning cycle. However the purpose of this study was not to test whether the sequence of events narrated by the interview subjects corresponds to the sequence of phases in the cycle or to analyze how they differ. There are studies that specifically focus on the dynamics of transition from one phase of the cycle to the next (e.g. Engeström, 1999b; Rantavuori et al., 2016). In any event, it is noted that the graphic representation of the expansive learning process is an ideal/typical model and will most probably not be observed in a clean linear fashion in actual empirical studies (Engeström & Sannino, 2010). In what follows, I will use the expansive learning cycle not to examine specific phase transitions but rather to represent the contradictions in the respective activity systems observed in relation to the Media School. The focus will be on the methods used to resolve the contradictions and the reasons why they remain unresolved. In order to engage in this final analysis, below I summarize Engeström's (2015) conceptualization of the four levels of contradictions in the expansive learning process. Resolution of these successive contradictions is regarded by Engeström as an indicator of the transformation of a practice or the creation of a new one.

Recap of Levels of Contradictions in Expansive Learning

The primary and general contradiction in an activity system emerges between the use value and exchange value of each of the elements of an activity system (Engeström, 2015). The primary contradiction arises as the main contradiction in a capitalist mode of production and permeates all activities.

The secondary contradictions are conceptualized by Engeström (2015) as arising between the elements of an activity system. He depicts these as occurring at the second phase of the expansive learning cycle. This is phase in which a new model or method of work starts to emerge to address the secondary contradictions. In the preceding four sections, I have analyzed and graphically represented the secondary contradictions in the different activity systems of Kaos GL's Media School.

Tertiary contradictions are conceptualized by Engeström (2015) as arising between an old object and a new object in an activity system. In the expansive learning cycle, this contradiction

is depicted as surfacing in the fifth phase of the cycle when there is resistance to an implementation of a new practice. This literally means that once a new model or method of work starts to be implemented, remnants of the old way of doing things will keep emerging and causing a disturbance (Engeström, 2015). For example, a tertiary contradiction is observed in Kaos GL's process of developing a new publishing policy. After the policy starts being implemented, people revert to the old habitualized ways of publishing content. The old construction of the object of publishing activity interferes with the new construction. The tertiary contradiction is gradually resolved by Kaos GL.

Quaternary contradictions are mismatches, tensions or disturbances between the central activity system and other activity systems that it interacts with (Engeström, 2015). This level of contradiction corresponds to the sixth and seventh phases of the expansive learning cycle and is called the phase of realignment with neighbours (e.g. Figure 21). For instance, when the publishing policy starts being implemented by Kaos GL, there is a mismatch between the new practice and the practices of some local correspondents. In this case, local correspondents are situated in their own respective activity systems. They are neighbours to Kaos GL's publishing activity. Some people stop writing because the new policy does not align with their own understanding of what kind of policy should govern the publishing activity. The central activity system no longer aligns with the activity systems of neighbours.

In what follows, I present the four levels of contradictions in the development of a) the model of the Media School covered in Section 1; b) the pedagogical approach in the Media School covered in Section 2; c) the model of interaction/communication between Kaos GL and local correspondents covered in Section 3; and d) the publishing policy and principles of KaosGL.org news portal covered in Section 4.

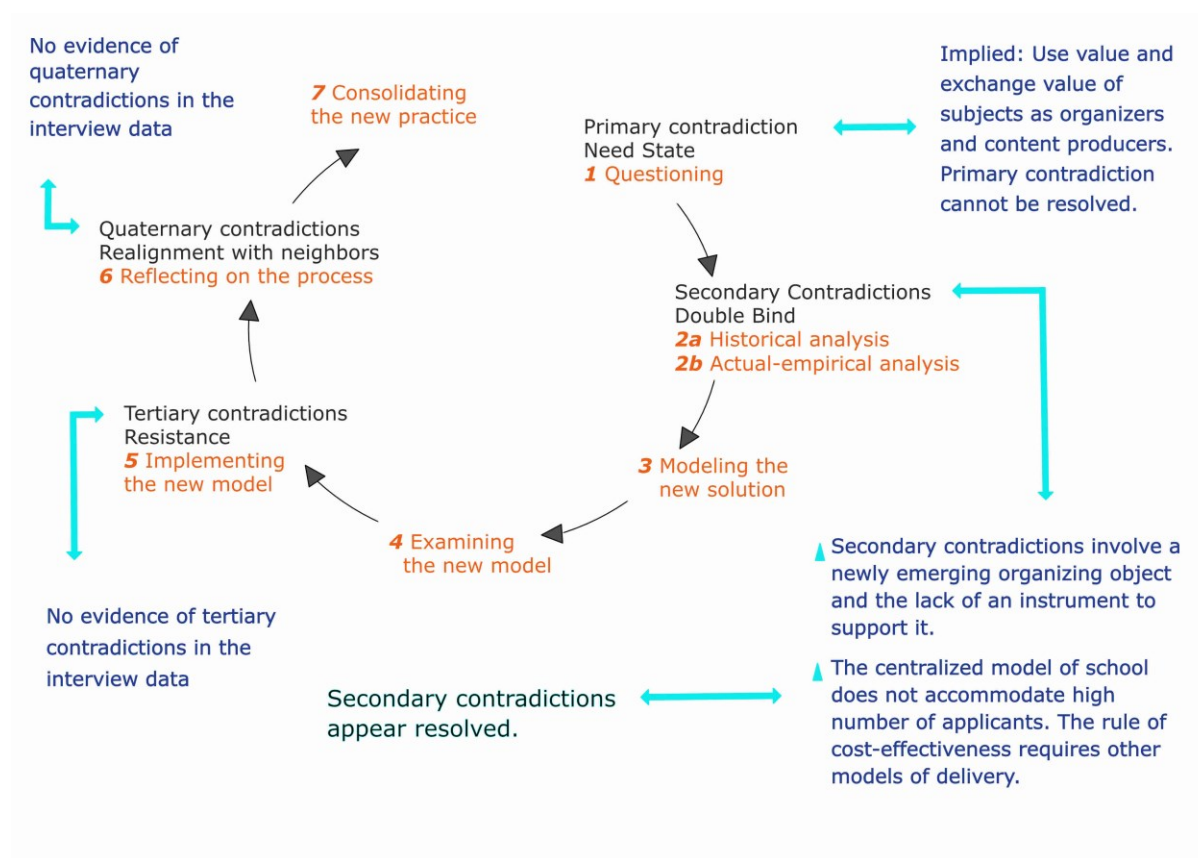
The final analysis of the contradictions for each section will be presented as follows. I first summarize the substance of the relevant activities and recap some of the major problems that were being experienced. I then address each level of contradiction under a separate heading and discuss its status. The questions guiding this discussion are: Were the contradictions resolved? If yes, how? If no, why?

The primary contradictions in most of the cases are implied but not explicit in the interview data. I did not infer the primary contradiction in cases where the interview data gave

little direction as to their nature. There is one instance in the following account where the primary contradiction is clearly visible. This is in the process of developing the publishing principles.

Contradictions in the Model of the Media School

In the process of developing the model of the Media School, the main consideration involved finding the true target group of the workshops. A major observation made by Kaos GL in this process was that participants of the Local Correspondents Training became organizing subjects. Hence, the object of the training activity expanded in a fashion that was not planned or anticipated. The training activity did not have the means to accommodate this expansion and the new quality went beyond the original goal of the school. The second major observation was about the number of applicants. The model of central delivery could not accommodate the quantitative aspect of the object. There was no clear method of selection. Limited financial resources could not accommodate the high number of applicants. The four levels of contradictions in the training activity system in this context are shown in Figure 21.

Figure 21*Contradictions in the Model of the Media School*

Note. The figure shows the contradictions that emerged in the development of the model of the Media School.

Status of Primary Contradiction. The primary contradiction is implied as the use value and exchange value of participants as organizers and content producers. This is implied in the question of whether it would be more cost-effective to hire several people to produce content instead of delivering training to people who may or may not produce content.

Status of Secondary Contradictions. Based on the data, the secondary contradictions in the model of the Media School summarized in Figure 21 appear resolved. To address the secondary contradictions, Kaos GL introduced additional activities outside the system of the Local Correspondents training to capture some of the variety in the population. Not everyone

necessarily wanted to become writers. However, people were interested in having contact with Kaos GL. These activities gave people additional interfaces so that they were no longer obliged to make contact with Kaos GL only through the Media School. Second, the model of the school was changed over an extended period of time to include multiple-stage local delivery. In the absence of a definitive method of identifying potential writers, the local delivery model increased the likelihood of finding people who would write for Kaos GL.org. The delivery of workshops in multiple stages allowed Kaos GL to redirect resources to people who were already writing and retain them. The Stage I workshops thus assumed an additional role. They were no longer only introductory workshops but also an instrument for selecting people for Stage II. Fourth, giving a name to particular types of activities conducted by Kaos GL enabled them to objectify new practices, develop new strategies and address some of issues around participant selection outside the system of the training activity. The introduction of content aimed at equipping participants with social media and web publishing skills allowed for the secondary contradiction to be resolved also within the training activity system.

Kaos GL's decision to support activists outside the training activity was made possible by observing and theorising about the new qualities that were emerging in people as a consequence of their new relations. This kind of reflective practice is qualitatively different from one in which an organization would observe the specific goals that they had set at a given time. Kaos GL was able to take effective action based on their focus on the ongoing change in the object of their activity. The object of activity was not fixed in its initial ideal construction. The observation was not limited to whether specific goals were being met but also included observations of the change in the qualities of participants.

The issue of maintaining communication with a growing number of local correspondents does not occur in the model of the Media School but rather within the construct of the network-building activity system which was addressed earlier. Therefore I address these contradictions below when I discuss the model of interaction between Kaos GL and local correspondents.

Status of Tertiary Contradictions. The interview data do not point to evidence of tertiary contradictions in the development of the model of the Media School. Once the new object was identified, it appears to have been followed without interference of the earlier form of

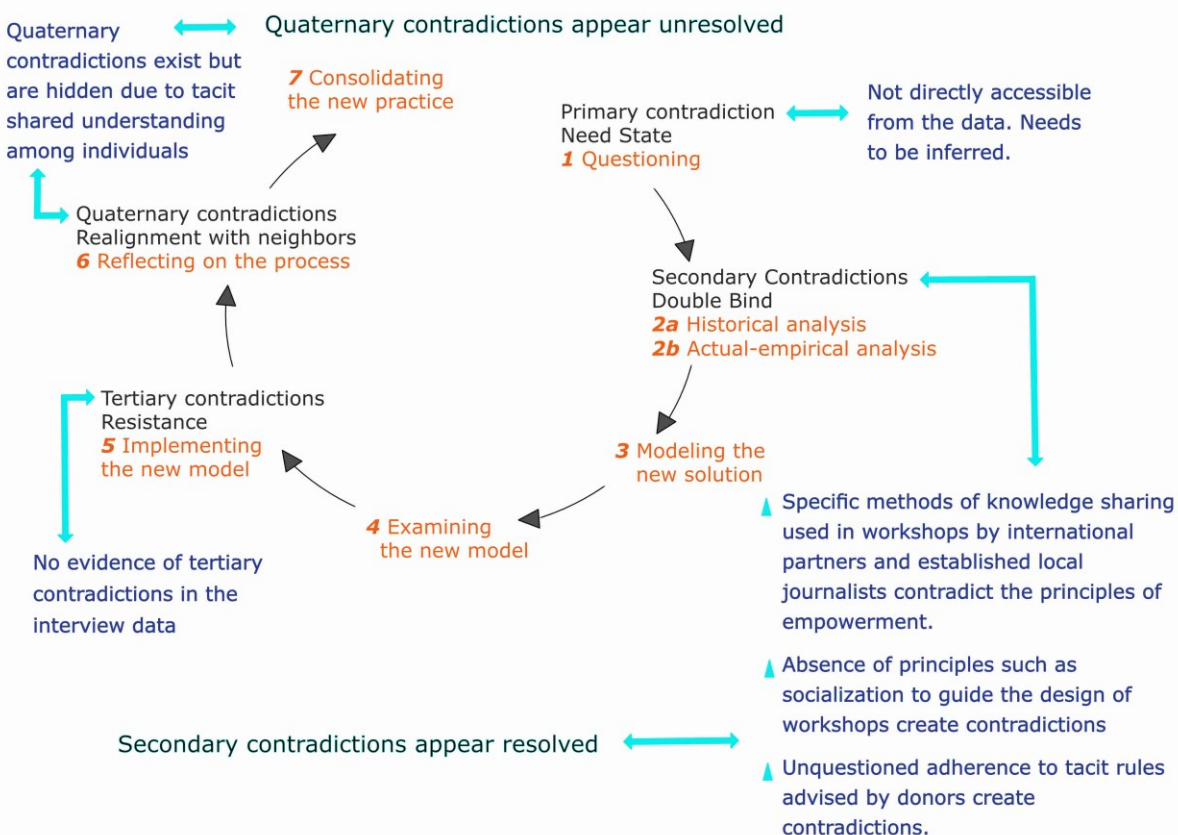
the activity. Media School participants are treated as content producers, activists and organizing subjects.

Status of Quaternary Contradictions. The interview data do not point to evidence of quaternary contradictions in the development of the model of the Media School. There are no clashes with the new model of the school and neighbouring activity systems. Moreover, the model of local delivery in multiple stages appears to be objectified with its distinct name and description and has become an established practice that can be conveyed to third parties with specific terms.

Contradictions in the Pedagogical Approach of the Media School

The workshops for local correspondents are initially based on a default method of knowledge sharing in which international collaborators or established journalists are invited as instructors. Knowledge sharing in this form demotivates participants. The pedagogical approach in the Media School is developed over an extended period of time as practices that do not work are abandoned. There is development towards a model where creating content assumes priority over imparting knowledge. The four levels of contradictions in the training activity system in the context of the pedagogical approach are shown in Figure 22.

Figure 22

Contradictions in the Pedagogical Approach of the Media School

Status of Primary Contradiction. The interview data do not offer enough information to analyze the specific form of the primary contradiction.

Status of Secondary Contradictions. The secondary contradictions of the training activity in terms of pedagogical approach appear to be resolved. With regard to the default method of inviting international collaborators as instructors, Kaos GL resists the form the rule of international collaboration takes. They introduce a negotiated decision-making process in their relations with donors regarding how to operationalize international collaboration. The tacit rule of international collaboration advised by the donor is not taken as given. It is accommodated as a rule but resisted in form. The rule is transformed to meet the needs of Kaos GL and participants of the workshops.

With respect to contradictions involving default methods of knowledge sharing by established local journalists, the interview data point to two main methods of resolution. First, Kaos GL starts to make generalizations over time regarding which approaches work better. These generalizations are not assumed. They are based on observed regularities. Second, the Local Correspondents Training produces its own solutions. It produces new subjects. Engagement in the new relations in the local correspondents training lead to new emergent qualities in both Kaos GL staff and people who take part in the workshops. New instructors emerge demonstrating new models of instruction that resonate better with participants. The expertise pool is widened over time to include people who have a shared understanding of the kind of content that is relevant and the methods through which such content should be delivered. The pedagogical approach is thus significantly altered. The participants of workshops are now viewed not just as consumers of knowledge who will become producers in the future. Instead, they are reconstructed as knowledge producers in the present.

With respect to contradictions involving the lack of methods to incorporate socialization in the workshops, Kaos GL observes the needs of participants over time. Socialization becomes incorporated as an indispensable principle in workshops.

Status of Tertiary Contradictions. The interview data do not point to evidence of tertiary contradictions in the development of the pedagogical approach of the Media School.

Status of Quaternary Contradictions. The interview data show evidence of quaternary contradictions in the implementation of the new pedagogical approach. These remain unresolved but hidden. Quaternary contradictions are significant for realignment with neighbouring activity systems (Engeström, 2015). The data suggest that full alignment with the activity systems of external instructors is not achieved. One of the crucial principles in the process of realignment with other systems is objectification of the tacit knowledge developed by a community (Virkkunen & Newnham, 2013). This process requires naming the new knowledge and practice and representing it in forms that are accessible to people who are not familiar with it. The need for objectification of Kaos GL's pedagogical practice is hidden by the fact that there is a shared tacit understanding of the unnamed approach among existing practitioners. The structural contradiction can potentially be resolved if the practice is named, objectified in policy documents and guidelines for external instructors in written and graphic form. In addition, process support

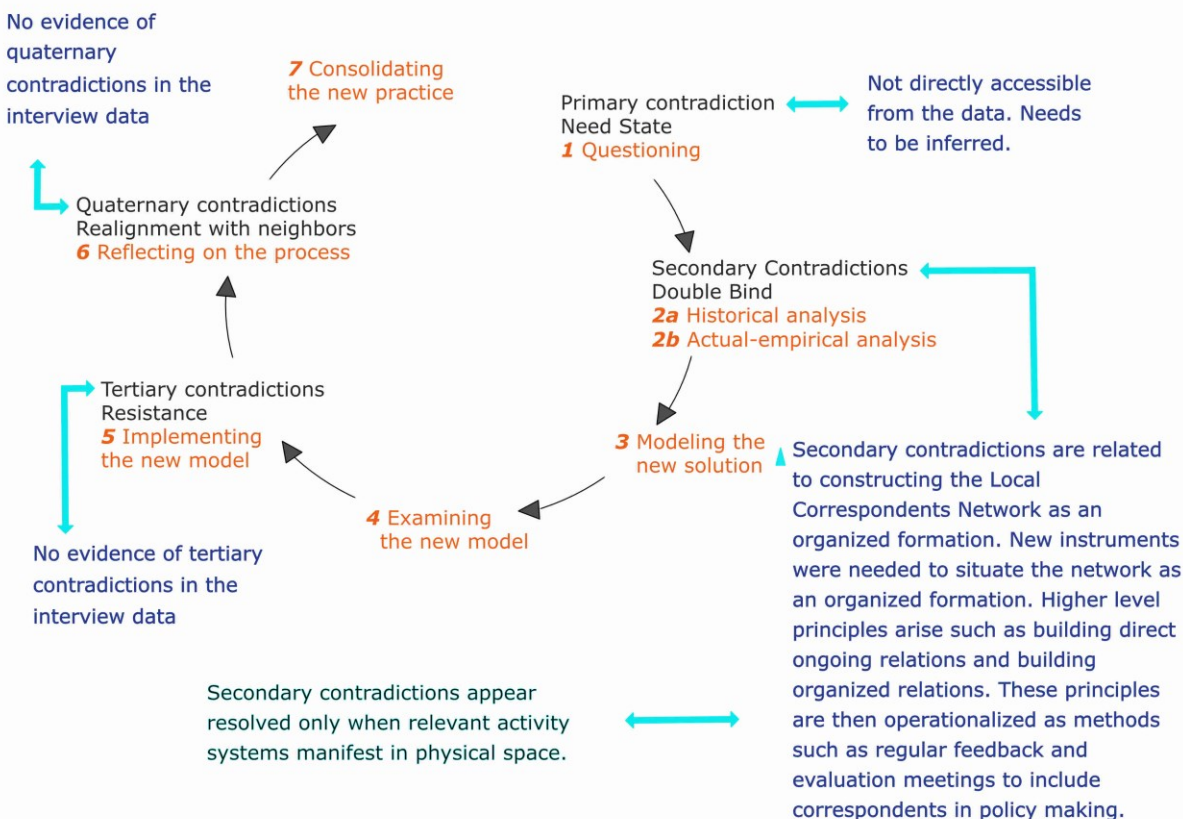
appears to be a possible means of transferring the new practice. Such forms of objectification and knowledge sharing through process may allow Kaos GL to benefit from the knowledge and skills of a wider community of experts who are not necessarily well-versed in pedagogical practices.

Contradictions in the Model of Interaction Between Kaos GL and Local Correspondents

The model of interaction between Kaos GL and local correspondents involves questions around how to communicate with the growing number of people in the network and how to construct the Local Correspondents Network as an organized formation instead of individual people who have one-on-one communication with Kaos GL. Over time, Kaos GL introduces new principles such as direct ongoing communication and organized communication to construct the network. These principles are brought to life using specific methods such as feedback and evaluation meetings to include members of the network in policy making. These new mechanisms function to transform the Local Correspondents Network from individual people who produce content into an organized formation that produces critique and policy recommendations. Figure 23 shows the status of contradictions in the expansive development of the model of organized interaction with local correspondents.

Figure 23

Contradictions in the Model of Interaction With Local Correspondents



Status of Primary Contradiction. The nature of the primary contradiction is not directly accessible from the interview data. It needs to be inferred.

Status of Secondary Contradictions. The secondary contradictions involving the process of building a model of organized interaction appear resolved only when interaction takes place in physical settings. Outside of these spaces, the contradictions remain unresolved. Kaos GL's model of interaction with local correspondents outside activities in physical space is predominantly an individual-oriented one. These contradictions relate to the inability of primary instruments such as phone or email to accommodate an organized model of interaction. Moreover, Kaos GL's the model of organized interaction in physical space has distinct characteristics that make it an effective model. For example, the feedback and evaluation meetings with local correspondents operate based on a distinct model. The word *meeting* can be

used to describe any form of gathering. The model of the meeting is what makes it effective. For instance, in feedback and evaluation meetings, local correspondents are in a social setting with peers, discussions are prompted and focused by a facilitator as well as by peers, critique production is welcomed and participants are not interrupted or challenged in the process. The model of the meetings offers process support to local correspondents so that they can be productive. Moving away from these environments, the individual-oriented model of interaction provides very limited process support. Local correspondents are left with their own devices to produce (either critique or content). In these environments, the product of productive activity becomes the focus.

The remaining contradictions in the model of interaction can be resolved by adopting primary instruments that can accommodate a model of interaction similar to that used in physical space.

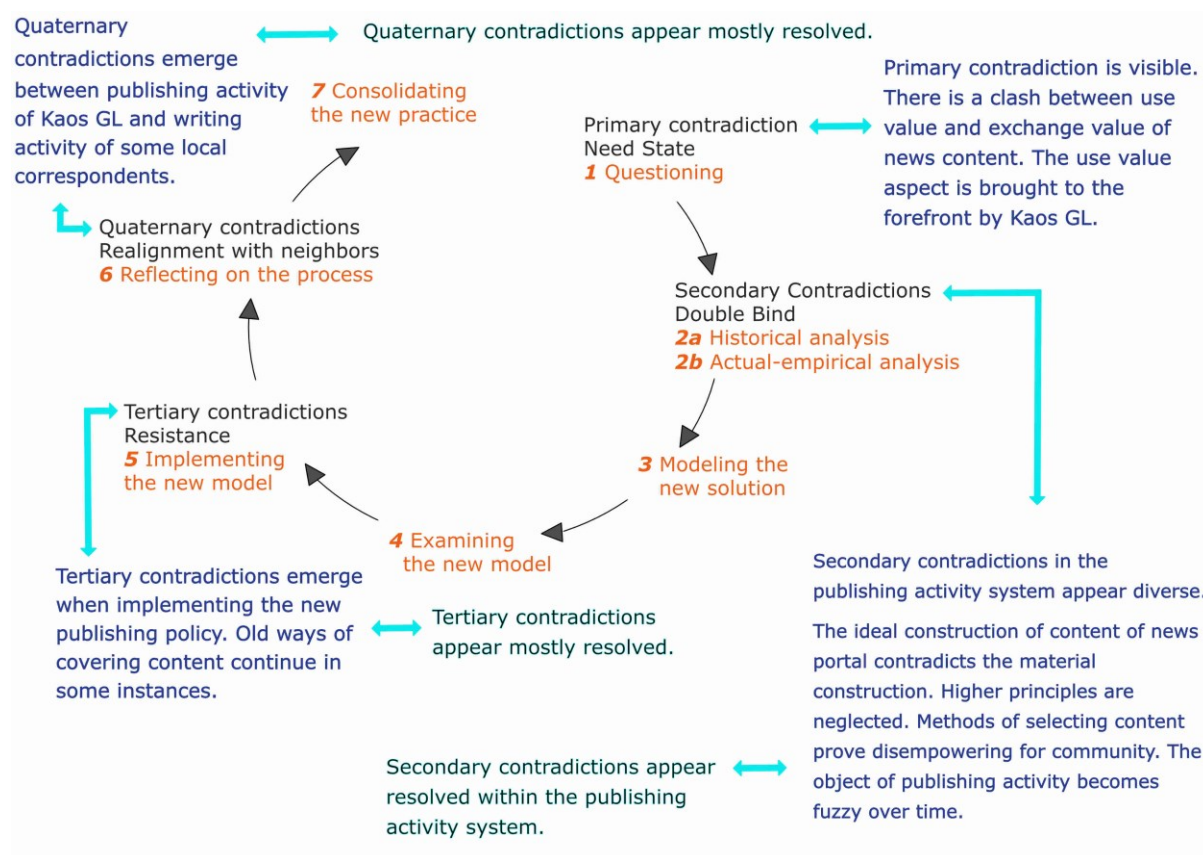
Status of Tertiary Contradictions. There is no evidence of tertiary contradictions in the interview data. The organized model of interaction appears to be internalized without resistance.

Status of Quaternary Contradictions. There is no evidence of quaternary contradictions in the interview data. The organized model of interaction does not contradict neighbouring activity systems. The remaining secondary contradictions reported above have to do with extending distinct activity systems into virtual space. They do not qualify as quaternary contradictions.

Contradictions in the Publishing Policy of KaosGL.org News Portal

Kaos GL's publishing activity was historically envisaged as a means of empowering the LGBT+ community by enabling them to write their own news stories. *We will make our own news* emerges as an overarching principle. Over time, the practical methods adopted in the activity started to blur the initial vision. Contradictions emerged in terms of content exclusivity, content diversity and content framing. Further issues emerged in decision making about repeated events such as submissions of anonymous allegation reports, etc. The four levels of contradictions in the publishing activity system are depicted in Figure 24.

Figure 24

Contradictions in the Publishing Activity

Status of Primary Contradiction. The primary contradiction in this context is visible and explicitly stated. This has to do with the use value and exchange value of the content published on KaosGL.org. Republishing works by professional journalists on the news portal was easier because it required less time, less effort, fewer resources. This is a practice that brings the exchange value of content to the forefront. This does not mean that there is no use value in republishing works by other people. There will always be a dialectic between use value and exchange value of content featured on the news portal. However, in this particular instance, the use value of content for the community is deliberately brought to the forefront when Kaos GL stops republishing non-exclusive works. Exclusive content produced by Kaos GL and the community is empowering and reflects the original vision for the portal. However, it also

requires more work and a clear, shared understanding about how decisions should be made about original non-edited works. Again, this does not mean that the contradiction between use value and exchange value of content is resolved. From the theoretical standpoint of expansive learning, the primary contradiction between use value and exchange value will remain in all productive activities functioning in a capitalist mode of production (Engeström, 2015). Participant 1 has noted that once the decision was made to stop featuring non-exclusive work, the publishing principles became more urgent.

Status of Secondary Contradictions. The secondary contradictions in the publishing activity system appear resolved. Kaos GL introduces structured feedback and evaluation meetings with local correspondents. These spaces and the models of interaction used to communicate with people start a process of critique production. The critique offered by the community is incorporated into the practice in the form of a clear publishing policy and publishing principles. The object of the publishing activity gains clarity and expands when news is framed from an LGBT+ perspective and personal stories of LGBT+ are introduced as acceptable news content.

The need to develop a shared understanding among the editorial team about how to make decisions about content contributes to triggering the process of articulating publishing principles. Repeated submissions of anonymous allegation reports by the community prompt the staff to revisit higher-order ethical principles guiding their work. Ethical concerns such as accountability towards the community and the commitment to develop a principled response first help to problematize the situation and then to address it. Problems of such nature that cannot be addressed within the publishing activity are taken outside and addressed elsewhere.

Status of Tertiary Contradictions. There is evidence of some degree of tertiary contradictions in the publishing activity system. Aspects of the old object (republished content) continue to emerge and interfere with the new practice. For instance, republishing some content that seems to be an exception continued for some time and was called out by some members of the local correspondents network. The interview participants noted that indecisiveness and disagreement around these issues were gradually diminishing. The tertiary contradictions appear to be mostly resolved in terms of the publishing activity system. However, the question of why

they continue to emerge needs to be addressed. I will revisit this question below when discussing the unresolved contradictions in the system.

Status of Quaternary Contradictions. There is evidence of quaternary contradictions in the interview data. When the new publishing policy and principles were introduced, this did not align with the existing practices of some of the local correspondents. In other words, the new instrument objectified in the form of publishing principles that guide Kaos GL's publishing activity system contradicted the instruments used by some local correspondents in their own activity systems. This meant that the object of publishing was constructed differently by Kaos GL and some correspondents. They were not writing about LGBT+ issues when the new policy required them to do so. The quaternary contradiction in Kaos GL's publishing activity was resolved only when some local correspondents stopped writing for the news portal. I will now revisit this issue together with the tertiary contradictions discussed above.

Remaining Contradictions. I have argued that the operationalization of the principle of empowerment within Kaos GL's publishing activity system has significantly narrowed the way empowerment was conceptualized in the early years. I have argued that this does not qualify as a resolution of a contradiction between different methods of operationalizing a higher-level concept. However I have also underlined that a broader conceptualization of empowerment cannot be accommodated within the publishing activity. The publishing activity appears to have resolved its contradictions. Resolving the higher-level contradiction requires moving above and beyond the publishing activity system in a manner similar to what Kaos GL has done in other instances. For instance Engeström and Sannino (2011) highlight that movement or transformation in an activity system comes about not by reconciling or embracing its inner contradictions, but by *resolving* them to transcend the existing situation to attain "something qualitatively different from a mere combination or compromise between two competing forces" (p. 371). In the publishing activity, the two different aspects of empowerment cannot be merely combined. This is practically not possible within the publishing activity system. However, the current situation suggests that a compromise has been made between two competing visions of empowerment. Transcending the existing situation literally requires a new model/method of knowledge sharing which is more flexible and dynamic. The concept of empowerment by informing the community needs to be reconceptualised so that the notion of *knowledge sharing* can replace the notion of *informing*. This can potentially help to ask questions about dynamic

models of interaction where actors in the Local Correspondents Network can share and create knowledge outside the confines of the publishing activity. The contradiction needs to be resolved outside the publishing activity system.

Answering the Research Question

The analysis of the data in the foregoing sections has yielded specific conclusions and considerations that may serve as a guide for Kaos GL when evaluating their practices. I have covered these case-specific conclusions and considerations in the respective sections. However, this study also addresses a more general audience. Therefore, the case-specific conclusions I have drawn need to be reformulated as generalizations that can be applicable to other practices and not just those analyzed in this study. However, prior to making generalizations, it is necessary to revisit the foundations of activity theory to address what exactly is a generalization.

The subject of generalization is a distinct concern for activity theory which is grounded in dialectical logic. In other words, the question of what we mean by generalization is problematized and theorized in activity theory. In this tradition, there are two types of generalizations which are systematically treated and theorized by representatives of dialectical logic (e.g. Davydov, 1990; Ilyenkov, 1982). These two types are empirical generalizations and theoretical generalizations. Below, I take a passage from Virkkunen and Newnham (2013) who summarize the difference between the two types:

Empirical generalization compares objects and phenomena searching for identical parts and qualities in them and classifying them on the basis of their external similarities.

Theoretical generalization, on the contrary, tries to find out how different parts and aspects are functionally related to each other and how they complement each other to make a functioning whole, a system that has qualities, which none of the parts have. (p. 32)

Ilyenkov (1982) systematically addresses how these two types of generalizations operate using two types of logic: formal logic and dialectical logic. Going back to Virkkunen and Newnham's (2013) summary, this means that an empirical generalization that uses formal logic identifies empirically observable similarities and differences in different cases whereas theoretical generalizations focus on functional relationships between phenomenon that are not immediately observable. In Change Laboratory interventions, participants are prompted to make

both empirical generalizations about their own practice by looking at immediately observable data and also to make theoretical generalizations by using conceptual instruments such as the model of an activity system. The idea is to push the empirically and immediately observable facts forward to uncover the links between them (Virkkunen & Newnham, 2013).

In the current study, I will be making theoretical generalizations to answer the research questions. This also means that the case-specific empirical generalizations will be decontextualized in an attempt to have wider applicability. I will give an example of the distinction between the two by referring to some parts of data from this study. For instance, in Section 2, I presented data from my interview subjects describing how they challenged a specific rule advised by donor organizations. The participant told me that you are able to do this when you feel empowered and financially strong enough. If I had been using a thematic data analysis method, I would have coded this segment as an enabler for the creation of a new practice. It is empirically and directly observable from the data: *Feeling strong enough to challenge requests by donors is an enabler for the creation of new practices in social movements*. However, the activity theoretical analysis using the activity system as a unit of analysis gives more insight into what enabled the new practice. Kaos GL was able to create a new practice by *accommodating a rule and resisting the form it takes as an instrument in their activity*. Expressed in this form, the theoretical generalization is decontextualized to include not just specific relations with donors but relations with any entity that may either impose or advise tacit or explicit rules.

Similarly, in Section 3 I presented data about how the model of interaction between Kaos GL and local correspondents changed over time. There is an immense amount of valuable insights to be learned empirically from this case study. For example, *including the community in policy-making processes* is directly observable from my interview data and it is indeed an enabler of a new practice. I would have coded this in a thematic analysis. However again, the activity theory analysis reveals that it is not just the general idea of including the community but rather the *model* used to include the community that enables a new practice. My interview participant noted that there was an attempt to establish organized relations. The theoretical analysis revealed that *organized models of interaction that provide process support to communities for generating ideas are an enabler for the creation of a new practice*.

In short, the theoretical generalizations I will make to answer the research questions are

an attempt to go beyond what was directly narrated to me by participants. There is no doubt that much empirical insights are lost when generalizations are decontextualized in this manner and I make no claims to have captured the richness of the insights offered to me. I will attempt to capture essential aspects that can be transferable to a broad range of activities by social movement actors.

The overall phenomenon explored in this study was how social movements create new knowledge and practices. From the standpoint of expansive learning, a new practice (or a transformed practice) is theoretically defined as one in which internal contradictions of the activity are successively resolved (Engeström, 2015). With this definition in mind, the two research questions and their answers are addressed below.

How do social movement participants create new knowledge and practices?

The question of how actors in social movements create new knowledge and practices may imply that there must be a deliberate design from the beginning regarding the exact path that will be followed and the exact outcomes that will be achieved when a new practice is launched. However, the findings of this study show that this may not necessarily be the case. When Kaos GL first takes action to train people to produce news content, there is some general vision of what the outcome should be but many of the approaches are default ones carried over into the activity from other areas. Nevertheless, these default approaches trigger a productive process. It is after this initial trigger that patterns emerge and reflective interventions give the process a new direction.

Speaking in a much wider context of the direction social movements should take in the face of seemingly insurmountable forces, Cox and Nilsen (2014) note that “there are times of advance when ‘build something, anything’ is a sufficient starting-point” (p. 163). However they also point out that this strategy is insufficient in cases of stalemate when there is no movement forward. I take this adage as being applicable in the context of Kaos GL’s practices. In the beginning there was a drive to build something, anything, without knowledge of the specific methods that would make it successful. However the same approaches were not repeated over and over again. Instead they were changed gradually over an extended period of time. This appears to be an important aspect of building a new practice in social movements. Some patterns are not immediately visible. It takes time for patterns to emerge and time for them to be

observed, articulated and addressed. It appears that the intent and effort made to observe and address patterns of change is crucial for pushing new practices forward.

What are the enablers and obstacles to the creation of new practices?

The relationship between the main and supporting question in this study has to do with specification. The supporting question aims to further explain how a new practice is created by specifying the enablers and obstacles which emerge in the process. Below I present seven such enablers and obstacles. Some are presented as an enabler or an obstacle, whereas others appear to have aspects of both. The implications of each are presented immediately below it.

Enabler/Obstacle 1. *Observing the constantly changing nature of the specific phenomenon towards which actors direct their efforts emerges as an enabler of a new practice in social movements. Such observation ensures that the phenomenon that is being addressed does not become fixed and rigidly cast in its original ideal conception. It also allows actors to capture new emerging patterns that were not anticipated in the beginning. Capturing new patterns imposes order on what was previously unknown and paves the way for developing new strategies. The new conditions that are created as the phenomenon changes through its own dynamics become grounds for new activities.*

Implications. Kaos GL's observation of the ongoing change in the people towards which efforts were directed enabled new courses of action that would not have been possible if they had only been concerned with their own specific goals. In the first instance, there was a realization that people had begun to organize. In the second instance, there was an observation that the local correspondents were not happy with the content produced on the news portal. This finding has implications in terms of how projects and interventions are designed and implemented in social movement organizations. A project may be designed with a specific goal. Its implementation may be successful in achieving the goal. However, goal-directed actions, especially in cases where they are successful, may provide limited insight into the different directions that the object of an activity is moving. The outcomes might look good on paper because actors will have achieved what they said they will achieve at the start. However the changing nature of reality will have been missed leading to a missed opportunity of what could have been achieved. This means that when projects or interventions are being designed by social movement actors, change should not be conceptualized as something that will take place only when the intervention or

project is completed. The phenomenon or the people towards which efforts are directed will be undergoing constant change through their own dynamics as projects and interventions move forward. They should not be treated as static entities waiting to be worked on and then changing only as a function of the intervention at the very end. Capturing the ongoing changing reality of phenomena and people as the work proceeds and adjusting responses is an enabler of a new practice. This implies that methods need to be in place to capture such change. Observation is one method which should be supported with methods of inquiry that reveal the change. Kaos GL appears to have achieved this through systematized feedback mechanisms.

Enabler/Obstacle 2. *In cases where no patterns can be observed to guide actors in deciding which specific course of action will work better to achieve an outcome, introducing models of work that can increase the likelihood of success in the face of the unknown emerges as an enabler of a new practice. Probability-oriented strategies complement pattern-oriented strategies to strengthen a practice.*

Implications. For Kaos GL this meant increasing the number of workshops across multiple cities to increase the probability of finding and recruiting people as local correspondents. This probability-oriented strategy complemented the strategies based on observed patterns. The two strategies worked together. This approach has implications for any activity executed by social movement actors. An observed pattern or regularity can help social movement actors direct their efforts towards areas that are more predictable, those areas where they know more or less that they can make an impact. Probability-oriented strategies can help to complement these efforts by exploring new areas that can potentially be impacted. Kaos GL used these two strategies in the context of a school where new writers were being trained and recruited. From a more general perspective, these two complementary strategies would enable other kinds of movement-building and recruitment efforts in social movements.

Enabler/Obstacle 3. *When working within the confines of existing explicit or tacit rules, the ability to accommodate the rule but resist the form it takes emerges as a powerful enabler in the creation of a new practice.*

Implications. This strategy has implications for many efforts in social movements. It goes without saying that there will almost always be some rule or dominant concept about how a particular work should be carried out. It may not always be possible to altogether abolish the

rule. However rethinking how the rule can be maintained but repurposed to meet the actors' needs offers a gateway into pushing social movement practices forward. Seemingly unalterable rules can potentially be redesigned and/or renegotiated.

Enabler/Obstacle 4. *Interpersonal relations where people have a tacit, shared understanding of how a particular task should be performed arise as both an enabler and obstacle for the creation of a new practice. Such relations are enabling because the new practice can be consistently implemented within a circle of people with economy of effort and little need to communicate the basic concepts or the rationale behind the new practice. However such relations also arise as an obstacle because they hide the need for objectification of the new practice so that it can be named, represented and shared with others who do not yet possess the basic concepts or rationale behind the practice.*

Implications. This finding emerged in the context of Kaos GL's interaction with external instructors with whom they were trying to share knowledge of the teaching methods to be used in the workshops. It also relates to how explicit objectified publishing principles became necessary when Kaos GL staff were unable to explicitly share editorial approaches with people who had recently joined the editorial team. The finding has broader implications. People may not always be aware of the extent of their tacit shared understandings, especially in cases where there is a history in the relationship. These shared understandings need to be explicitly articulated, named and brought together in a representational form that can be shared with other people.

Enabler/Obstacle 5. *Organized models of interaction that offer communities process support when generating new ideas, policies and critique emerge as an enabler in the production of new practices. Not transferring these types of models of interaction to virtual spaces emerges as an obstacle in the production of new practices. Process-oriented organized models of interaction and the distinct qualities that make them effective should be recognized, named and special effort should be made to replicate these models in multiple spaces.*

Implications. This finding emerged in the context of Kaos GL's activities to include the Local Correspondents Network in policy-making processes. However, it has implications for a broad range of practices in social movements. Process sharing is different from product sharing. The first enables giving support to people in the process of developing ideas (in the form of policy recommendations, critique or any other product) whereas the second merely asks for the

product of reflection. *Reflect on this issue and tell us the product of your thought* is different from *we will support you in a shared process of reflection*. These two approaches entail different models of interaction. The organized model of interaction in Kaos GL's feedback and evaluation meetings with correspondents is a *thing*. It is not a *thing* in the same way that a computer is a *thing* therefore it has the danger of going unnoticed, remaining invisible. It is a model, an instrument that helps to produce ideas. These models should be recognized for what they are and what they help produce. The specific methods that constitute the model should be recognized, articulated and named. If they are recognized as distinct models, their salient aspects can be transferred to other activities as well to other mediums such as virtual space.

Enabler/Obstacle 6. *In cases where a higher order vision needs to be operationalized using multiple methods that are distinct from one another, choosing only one of these methods is an obstacle to the creation of a new practice. The choice gives the appearance that a contradiction between methods has been resolved. However it points to a compromise and narrows the vision by addressing only one aspect of it at the expense of the other.*

Implications. This finding emerged in the context of Kaos GL's publishing activity. It has broader implications because there will be a wide range of activities in which choices need to be made about what specific method works to achieve a vision. Some of these methods will preclude one another. However, especially in cases where one method appears to function successfully to achieve an outcome, it can hide the fact that a compromise has been made to exclude an entirely different aspect of a vision. It may not be possible to accommodate different aspects of a vision within a single activity. In these cases, those aspects of the vision need to be taken outside the immediate activity which is the focus of attention and addressed elsewhere.

Enabler/Obstacle 7. *Ethical principles introduced into the system from within serve as an enabler of a new practice. Such principles force practitioners to first construct a situation as a problem and then stimulate them to resolve the problem using new methods both within and outside the activity occupying their immediate attention.*

Implications. This finding emerged in the context of Kaos GL's process of developing publishing principles. There was no external rule or requirement imposed on Kaos GL to give justifications to people about why a particular course of action was being taken. Ethical rules such as keeping yourself accountable, making a commitment to respond, justifying your

response, and forging a principle when you do not have one pushed the publishing activity forward to resolve its contradictions.

Chapter Six: Conclusion

If this study had been conducted as part of a formative intervention, I would not be writing a Conclusion. To use Gregory Bateson's (2000) term, I would have punctuated it differently, and instead of an ending, it would have marked a beginning. I would have presented the analysis to Kaos GL with the expectation that they reflect on it, challenge it and refine it so that meaningful steps could be taken to collectively rethink some aspects of their practice. However, I am operating as a subject in my own activity system of academic research, which requires that I align myself with academic rules and procedures of knowledge representation. The punctuation thus comes in the form of a concluding commentary.

The findings of this study have broader implications, which I have already presented. The analytical framework, offered by expansive learning and activity theory, also have broader implications, which I have not yet addressed. I take this opportunity to address them here.

The point of departure for this study was my own experience about the difficulties involved in creating new and stable collective practices in social movements. In a very general sense, this study was about organizing collective productive work. It is self-evident that if there is difficulty in achieving this, one needs to question why that is so. I find that an activity theory analysis of the data has proven to be invaluable for grasping the systemic roots of surface problems, which may have otherwise gone unnoticed or been interpreted differently. For instance, when I argued that Kaos GL's publishing activity had resolved its secondary contradictions by discarding one aspect of a vision of empowerment, I was working through the model of activity, which allowed me to reflect on the initial multifaceted vision operating as a higher-order instrument. Only one facet was retained in the publishing activity. Kaos GL staff have not abandoned the other aspect because they no longer endorse it. On the contrary, participants reported that there were remaining arguments around this other dimension. They have abandoned it simply because the vision is too big to fit into the publishing activity. The directly accessible empirical data from the interviews do not bring this to the forefront as a problem. However, the theoretical analysis does. It forces us to ask the question: What happened to the other aspect of the vision? Why has it not materialized? If the answer is because there is no method for it, then this remains an unresolved contradiction from the standpoint of activity

theory. The fundamental assumptions behind the theory push us to imagine the possibility of an infinite number of activity systems through which different aspects of visions can be methodized.

Again, constructs such as tertiary and quaternary contradictions offer more insight into seemingly insignificant clashes such as those I have reported with external instructors who had trouble adopting Kaos GL's pedagogical approach. Activity theory allows us to push the analysis beyond the performance of individual people to search for systemic flaws and incompatibilities. In the absence of such a framework, I could easily have interpreted the data to reach the conclusion that the *lack* of a shared understanding of method is an obstacle to the creation of a new practice. And, on the surface level, this is true. However on a more systemic level, the analysis has shown that rather, the *presence* of a tacit shared understanding between people is both an obstacle and an enabler. These are subtle but significant insights that offer better opportunities for root problem solving at an organizational level.

I also find that imagining the model of activity as a productive system has been a powerful exercise in the analysis. If all activity systems are theoretically understood as productive activities, one starts to search for what exactly they are producing. There were activity systems in this study that produced confusion, loss of motivation, loss of morale, as well as those that produced policy and meaningful critique. The theoretical constructs push us to search beyond the ideal construction of a product. They force us to look for any kind of production, both favourable and unfavourable. Linked to the idea of production is the idea of conceptual instruments of production, which could easily have been missed if I had not been looking for them. A simple method used during a meeting constitutes part of a larger model of interaction, which deserves to be noticed. I find that it is these kinds of things happening before our eyes that are often neglected because we do not recognize them as instrumental in a productive process. Activity theory has allowed me to look for them, name them and follow them.

From this perspective, the problem which I raised in the beginning about difficulties in creating new collective practices in social movements gains another dimension. I noted that if there is difficulty in this process, then one needs to question why. Through activity theory, expansive learning tells us that the manner in which this questioning takes place is critically important for unearthing root causes of problems before any suggestions can be made about how

to solve them. The analysis I have undertaken in this study has revealed disturbances that hinted at root causes. I find that such an analytical exercise would be useful for all social movement actors operating in organizational settings where they have the opportunity to engage in more systematic and critical reflection of their own practices.

Since the activity theory analysis has enabled me to make theoretical generalizations that have wider applicability than a thematic analysis, the limitations of a case study do not apply to the findings herein. However there is a limitation that I find to be important. The subtle points made by the interview participants could be identified and analysed using activity theory. It goes without saying that there would have been further subtle points and disturbances available for examination if this study could have been conducted with a higher number of interview participants in multiple rounds as well as on-site observations. This could have provided more detail about the nature of the disturbances and would have enriched the findings.

As a standalone study, the findings have broader applicability across different social movement organizations. Punctuated differently, I also see this study as one of the preparatory exercises that I would have conducted prior to a formative intervention. From here, some suggestions can be made for future research. One of the critical findings in this study has to do with the objectification of knowledge and practices. Objectification has arisen as a significant concept for institutionalizing practice. It has emerged in the context of Kaos GL's pedagogical practice as well as the publishing practice where principles needed to be developed and objectified so that people could be aligned with one another in decision-making processes. I find that this is a highly critical point to pick up from in future studies. How is knowledge objectified in social movement formations? Where is it objectified? How is it shared? To what extent is it shared? At what junctures do people feel the need to objectify their knowledge? These questions are significant from a broader perspective of social movement learning. If we accept that building and maintaining alliances and collaboration is important for social movements, then it would make sense to investigate the forms in which knowledge of different groups of people are objectified and the ways and extent to which they are shared. This would fall under a general theme of knowledge representation and sharing in social movements. I find it would be a meaningful line of inquiry to build on in future research.

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Appendix A

Phase I Interview Guide

Thank you for agreeing to take part in this interview and sending me your written consent form.

Please remember that throughout this interview, you do not have to answer any questions that you do not feel comfortable answering. You may choose to skip any questions or answer them only partially if you choose to do so. You are also free to stop the interview at any time. I would like to remind you also that this video interview will be audio recorded.

Do you have any questions about the study or the consent form that you have sent to me?

Thank you, with your permission, I would like to start the audio recording now.

I would like to ask you some questions about the development of the Media School starting with some more recent events. I am interested in learning about specific events that you find to be important and why you think they're important.

1. Can you recall a recent event of the Media School in which you participated that you find was important? (This may be a planning meeting, a training event anything you find important.) Can you describe what happened?

Prompts

- What happened next?
- Who were the participants? (You do not have to give names)
- When was it?
- Where was it?
- Why do you feel this was important?
- Can you give an example?
- How was this event different from other events you attended in the past?
- Why did it change?
- Why was it never changed?
- If you could, what would you like to change about it?

- Why?
- What was your role in this event and what is your role in the Media School in general?

2- Can you recall other events that you participated in when you first became involved in the Media School? Can you describe what happened?

Prompts

- Can you recall what happened after that?
- Who were the participants? (You do not have to give any names)
- When was it?
- Where was it?
- Why do you feel this was important?
- Can you give an example?
- How was it different from today?
- Why was it changed?

3- Can you describe some routine events that you have under the Media School?

- Can you recall how you decided on this practice?
- What was the need?
- Who is the target group and goal?
- What were some of the conversations you had with people when you decided on including this practice in the Media School?
- How do you feel about these routine practices?

4- Do you collaborate with other organizations or groups when designing and implementing activities for the Media School?

- Can you give an example from a recent collaboration initiative?
- What did you do?
- Does it work?
- Why do you feel it works? Or, Why doesn't it work?

5- Can you recall any frustrations you experienced when designing or implementing activities under the Media School (either recent or past)?

Prompts

- Can you give examples?
- Why were you frustrated?
- What did you do?
- In a perfect world, what would you have liked to happen in this example?
- Why do you think that didn't happen?

6- What is it you like most about the Media School?

- Can you give examples?
- Why do you like this? Why do you find it's important?

7- Can you share with me any documents that you used in any of these events? For example these may be any strategy documents you have for the Media School, training materials, project proposals or plans or any other documents you deem relevant. Please do not share any correspondence with third parties. Please only share those documents which are not confidential.

- Which ones do you find most important?
- Why do you find these important?
- How were they developed?
- Who developed them?
- When?
- Why were they developed?
- What was the need?

8- Can you talk about how the Media School is funded?

- Is it working?
- What do you want to do that you couldn't do?
- Can you recall the last conversation you had with your colleagues about funding?
- What did you talk about?

9- Can you tell me why the Media School was launched in the first place?

- Were you involved at the time?

If yes,

- What were some of the conversations you had at the time?
- What was the need?
- Can you give an example?
- Who were the people you were talking to?
- How do you think it was different from today?
- Why did it change or not change?
- How do you feel about the changes?

If no,

- What do you know about the reasons behind launching it?
- Where do you know this from?
- Do you think it was a good idea?
- Who was involved?
- How do you think it was different from today?
- Why did it change or not change?
- How do you feel about the changes?

10- How do you see the Media School within the overall activities of the organization?

- How does it relate to other activities?
- Can you give an example?

11- Is there anything else that you would like to share with me about the Media School that we might have missed and that you find important?

Thank you so much for taking part in this interview. Over the next few days, I will transcribe the audio recording of this interview and send you the transcribed text via e-mail. I will ask you to review it and let me know if there are any parts that you would like to keep out of the analysis.

Appendix B

Phase II Interview Guide

Thank you for agreeing to take part in this second interview. I would like to remind you once again that throughout this interview, you do not have to answer any questions that you do not feel comfortable answering. You may choose to skip any questions or answer them only partially if you choose to do so. You are also free to stop the interview at any time. I would like to remind you also that this video interview will be audio recorded. Do you have any questions about the study or the consent form that you have sent to me?

Thank you. With your permission, I would like to start the audio recording now.

1- In the last interview, you talked about some events/incidents that you found to be important (mention events/incidents). You said xyz. Can you give more information about that incident?

2- Can you recall specific conversations about this incident that you had with other people?

- What did you talk about?
- What is problematic?
- Why do you think so?

3- Is there anything else that you would like to share with me about the Media School that we might have missed in the previous interview?

Thank you so much for taking part in this second interview. Over the next few days, I will transcribe the audio recording of this interview and send you the transcribed text via e-mail. I will ask you to review it and let me know if there are any parts that you would like to keep out of the analysis.