

AGE, ACTION RESEARCH, AND ANALOGICAL THINKING

Richard Ennals

**Centre for Working Life Research
Kingston University**

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Abstract

Age should bring benefits, and not just problems. This address explores new opportunities for the ageing worker from within the senior form of life, and identifies practical ways forward. Particular emphasis is placed on approaches drawn from action research and analogical thinking. The speech ends with practical proposals.

Personal Background

In recent years, I have been working in a number of fields, such as occupational health (with the International Commission on Occupational Health and the Health and Safety Executive), workplace health promotion (with the European Network for Workplace Health Promotion), and well-being (with the Club of Geneva). In each case, age has recently become an increasingly prominent issue. It has moved centre stage, having previously been at the margin. Then, from seeing ageing workers as a problem best solved through early retirement, the balance has swung again, and the priority is now to retain access to the knowledge of the senior.

Part of this change is due to the new challenges of knowledge society, and fresh understanding of the nature of the knowledge in question. After disastrous experience of outsourcing, downsizing and automation, some researchers now see continued access to the tacit knowledge of the experienced worker as being of central strategic importance for organisational survival (Ennals 1995, Ainger at al 1995). This is increasingly apparent in work organisation and citizenship education, with implications for relations between generations, and for society as a whole.

It is not clear that governments or managers in the private and public sectors have yet come to terms with the new challenges. How can communication be maintained with older workers, particularly if they are no longer in full-time employment? Is there a new part to be played by new technologies? What does this mean for lifelong learning? Of course, it is helpful if one has already been addressing issues of communication, new technologies and learning. In that case, attention to seniors is simply part of enterprise development.

Age

Philip Taylor, in the first keynote speech at this conference, has presented an overview analysis of a range of important policy issues, which involve ageing workers, and require urgent attention from those concerned with Seniors Policy. Some of those issues, such as the future of pensions, have clearly become too hot to handle, and were not debated in the recent UK general election.

My task this morning is to consider the range of discourses in which issues of age arise. The obvious starting point was not to read a pile of policy papers, but to look in the mirror, where my face shows increasing signs of age. Indeed, a few days ago I asked my employers for details of possible early retirement from my present post. There is no substitute for the experience of considering the options.

This debate on “Seniors” is not about some obscure group of people. We represent the problem, or the opportunity. The debate concerns the form of life, new for our generation, which I have now entered as a “Senior”. As teenagers, many of us, as was said in the song “My Generation”, “hoped we would die before we got old”. We failed. What do we do next?

There are new language games to be learned (Wittgenstein 1953), in what will be a process of lifelong learning. We have to learn to be able to see things differently. After many years of enjoying performances of “The Wild Duck”, we may have to concede that, from certain points of view, the creature in question was, indeed, a rabbit. It is worth revisiting the work of Wittgenstein, who was a great admirer of Ibsen. We may reflect that our worthy predecessors who claimed to be, in Ibsen’s terms, “the pillars of society”, turn out to have left us a shaky legacy. We are in the realms of an Ibsen play, such as “Ghosts” or “John Gabriel Borkman”, where the dreadful truth about the past emerges piece by piece, and it is too late to change what has been done.

Policy discourses tend to be clearly demarcated, reflecting the institutionalised silo cultures of experts and civil servants. The discourses are expressed in terms which reflect their need to achieve recognition by decision makers and scientists. By contrast, we human beings are all ageing, and we do not necessarily do so gracefully, or in a compartmentalised manner. As we age, we may contribute to, or be considered by, a number of different specialist discourses. We should be prepared. The picture may not be seamless and consistent. We should recognise that “evidence based policy” is a myth. In practice, policy makers determine what evidence they will consider as relevant, suiting their needs. Seniors policy is now in the realms of policy based evidence.

We know that with the future shortage of adult workers, and the increase in seniors, it is in the interests of government and management to encourage workers to continue in the workplace for longer, while the tendency has been for average ages of retirement to fall. The issue cannot be seen in isolation: if there is a labour shortage in a particular sector in one country, we are likely to find prospective willing migrant workers. Migrant workers bring families, and a whole set of policy issues are raised. Already, in the newly enlarged European Union, we see the impact of mobility of labour between 25 member countries.

Action Research

Traditionally, social science researchers have seen it as important to be seen as concerned to be detached and objective, arriving at formal conclusions, preferably quantified, which are then regarded as “scientific”. Social scientists tend to have deferred to the perceived rigour of the natural sciences, displaying what has been termed “physics envy”.

Here, with ageing, we encounter a classic instance of Giddens’ (1984) account of structuration. We, as “Senior” researchers, are ourselves under study. We cannot escape the fact that we are involved. We cannot, in all honesty, just stand back, and pretend to be detached observers of ourselves.

Some of us at this conference come from a tradition of Action Research (Greenwood and Levin 1998, Ennals and Gustavsen 1999, Gustavsen et al 2001, Levin 2002). We engage in research with the intention of bringing about change and organisational renewal, through interventions which we will plan, implement, and then reflect upon. The action research process is transparent, and intended to encourage participation, dialogue and democratic engagement. It is a process which involves cycles of learning, much of it informal.

The Czech-born playwright Tom Stoppard recently wrote and staged a series of three plays at the National Theatre in London, about nineteenth century Russian socialists: “Coast of Utopia” (Stoppard 2004). By analogy, looking at the wealth of experience over the last 20 years, we could characterise Stockholm as “The Archipelago of Innovation”, with several stories on innovation and action research running in parallel, with consistent themes of democracy and participation. In recent years, the action research and enterprise development tradition has been stronger in Norway. As in the case of nineteenth century radicals, there has been considerable travel across borders, taking experience to new contexts, and resulting in new hybrids.

Action researchers themselves are an ageing population, often professing themselves proud of their tradition. It is becoming apparent that the knowledge of ageing workers, including ourselves, is a vital resource for a sustainable “knowledge society”. This has particular implications for ageing action researchers. As with ageing folk singers, there is a danger of singing about “how good the old days were”, while neglecting the challenges which require action today.

Change

Demographic change has been rapid, and far from uniform across Europe. Particular industries, such as the metal industries in Finland, have encountered specific difficulties which have necessitated intervention. The Finnish approach to work ability, and the work ability index, was designed to meet practical problems in the workplace, in physical, social, cognitive and psychosocial terms. Lessons have been learned in other countries, such as France (in the aerospace industry), Norway, Estonia and Austria. Sweden conducted an exhaustive review of the state of the art in preparation for their Presidency of the European Union (Ennals 1999, 2000, 2001).

Research has long shown that when experienced workers retire, those who remain in the workplace tend to find a need for access to the experience, skill and tacit knowledge of their former colleagues. Often the realisation is not immediate, but the issue is highlighted when things start to go wrong. This may be two or three years later, when contacts with the former workers have faded. Typically only part of the job turns out to have been replaced, dealing with explicit knowledge and some procedures, which represent the tip of the iceberg. There are similar issues with automation and downsizing (Göranzon 1982). The challenge is to address the tacit knowledge which lies hidden, and derives from “knowing”.

Patterns of change in organisations, including technological transformations, can make it harder for dialogue to be maintained across the generations of workers. There is little continuity. Anne-Inga Hilsen (Hilsen and Ennals 2004) explored the case of software used in social insurance offices, where seniors are moving into retirement: seniors are happier with text-based software, while younger staff members are more familiar with Windows interfaces. The older systems were less ambitious, but they were more likely to work. What is more, seniors were familiar with how they worked in practice in human terms.

As realisation of the practical implications of demographic change dawns in the minds of managers and policy makers, there is an increasingly urgent demand for analysis of the nature of the knowledge of older workers. The American artificial intelligence vision (Feigenbaum 1984) was that the knowledge of the expensive expert could be captured, and made available via an expert system, meaning that, in principle, the organisation would not suffer when the expert left. Expert knowledge was to become a commodity. This approach was effectively satirised at the 1988 Stockholm conference on “Culture, Language and Artificial Intelligence”, with a set of presentations on “artificial stupidity” (Göranzon and Josefson 1988, Göranzon and Florin 1990).

Dialogue

The simplistic artificial intelligence technology fix did not work. Solving organisational problems is a matter for people, and for human centred systems, based on people who know what they are doing (Ennals 1995, Ainger et al 1995).

Major disasters, such as the 9-11 attacks, shook confidence in the effectiveness of organisational command, control and communications. It is now recognised that crisis communication depends on the prior existence of trusted dialogue partners. Unless we have established prior dialogue, we may be unable to cope with disaster. As John Shotter has argued (in ed. Göranzon et al 2005), learning comes from encounters. This cannot be outsourced to inanimate systems.

We as ageing workers have in common that we are getting older, but have been younger. When we leave the workplace, we will leave behind our work-oriented structured dialogues, which provide ready-made frameworks for analytical thinking. This suggests that there is a need, while still working, to develop and deploy new habits of dialogue which can be taken forward and maintained in retirement. The consequences of failure include deterioration in skilled work, increased individualisation, and social disintegration.

Margot Konitzer’s paper (Konitzer 2005), to be presented in the final paper session, deals with the case of Mature Minds. This is a network of seniors, now largely self-employed, after careers with corporate employers, seeking to share experience and find new opportunities.

The vital starting point is practical experience, which we can use as the basis for learning from differences.

Analogical Thinking

In traditional societies, everyday dialogue transcends professional and class barriers. Explicit knowledge is accorded less priority. Respect is shown to those with implicit knowledge, who know how things are done, and those with tacit knowledge, derived from experience. The oral tradition has an important role. One neglected interpretation of the Dreyfus (Dreyfus 1990) model of levels of knowledge is that modern societies are in fact no different in this respect. Those who operate most effectively know how things are done, and are able to go beyond the official rules. Those who rely on explicit knowledge, in the form of facts and rules, will always, ultimately, be limited in their potential. Power, in the sense explored by Foucault (1967, 1970, 1972), resides with those who know how to make people offers they cannot refuse, in a language they can understand. Power is held by insiders, and withheld from outsiders.

Despite the pace of change in the workplace, and the explosion of information, there are alternative ways of communicating and thinking available. It is not simply a matter of faster access to larger databases. Remorseless analytical thinking will not provide reliable access to tacit knowledge. Instead, we need to take a sideways step, and engage in analogical thinking.

Analogical thinking is not new: it lies at the heart of successful humour and theatre, and distinguishes effective journalism. There are limits to precision, when what we need is active engagement. We will all recall television programmes, films, plays, books or poems which have made us laugh, and made us think. What can we learn from this, for dialogue with seniors, inside and outside our organisations?

Grey Power and Zimmer Rock

In my workshop paper at this conference, I consider the case of ageing action researchers, relics from the period of rock and roll. We are still continuing the process of planning, action and reflection, even as we go through our own personal transitions.

40 years ago, Margot Konitzer, of Mature Minds, and I were dancing together to live rock and roll bands. She celebrated a recent birthday with a live band called “Mid Life Crisis”. The Rolling Stones are still touring, despite their status as seniors. There are occasional performances from The Who, The Beach Boys, and The Beatles still command a young audience although, it is now “almost 38 years ago today that Sergeant Pepper taught the band to play”.

In Norway both action research (for example with AFI) and rock and roll (for example Wig Wam) are alive and well. Both rock and roll and action research claimed to want to change the world, and have at least grown old together, while wanting to remain “Forever Young”. It is not too late! When I worry about “When I’m 64”, complain that “I can’t get no satisfaction”, or predict that soon I will be living “down at the end of Lonely Street, in Heartbreak Hotel”, I am stepping outside a narrow professional or national discourse, engaging in a potential global dialogue, and able to talk across conventional subject divides.

At a time when gaps in communication are appearing as a vital issue in global politics and economics, our common participation in a popular music culture could have considerable significance. “Band Aid” was the tip of an iceberg. This week we see Bob Geldof launching “Band 8”, planning a new series of concerts, targeting the G8 summit of major industrial nations. How can we make connections across borders and generations, and gain access to what lies below the surface?

Dialogue Seminar Method

More generally, we can introduce the Dialogue Seminar Method (Göranzon et al 2005), which has been used to facilitate dialogue and communication in numerous private and public sector organisations. The new book “Dialogue, Skill and Tacit Knowledge”, now in press, is a result of 18 years of international collaborative research, between ageing partners, and follows six previous volumes in the “Skill and Technology” series. Action researchers have often concluded that they need to bring participants together in Dialogue Conferences. Sometimes they then ask what should be discussed, and how. Here we provide some possible answers.

After the age of rationality and analysis introduced through the Enlightenment, it is time to return to reason (Toulmin 2001), and to appreciate the power and utility of analogies. Memorably, Toulmin (1995) performed the “imaginary confessions” of great Enlightenment philosophers in their last days, locating their new published theoretical abstractions in practical human contexts.

We need to recognise that we are all, in principle, able to respond to stimuli, reflect, share our responses, and engage in facilitated processes, which enable us to develop social capital. Social capital turns out to be central to the sustainability of knowledge society. These processes need to be encouraged.

My conclusion is that action researchers need to address problems of age, including our own ageing, but to do so before leaving the workplace. We need to engage in a new process, such as is offered by the Dialogue Seminar Method, giving access to some of the wisdom and tacit knowledge of older members of society. Companies and other organisations have taken the opportunity to reflect together, responding to shared experiences or to impulse texts, and to share their reflections.

This might be regarded as an invitation to rediscover the value of communities. Despite what Margaret Thatcher may have said, “there is such a thing as society”. Given that the alternative to action research may be seen as “inaction research”, and mental inactivity is medically inadvisable for ageing workers, the arguments above, which have been directed to action research, apply to all of us. Action research is the new rock and roll. It respects no boundaries.

Active Conclusions

The unremitting pace of change makes lifelong learning vital. It also shifts the focus away from absorbing facts, and places a premium on the capacity to learn in dialogue. Seniors should not drift away from mainstream dialogue, but their distinctive knowledge should be recognised as a vital resource. We are seeking to build new inter-generational relationships, aided by analogical

thinking and appeals to common interests. Given the reality of changes in work and life over time, it is important to facilitate reasonable transitions, with continued communication, enabling sustainable social capital.

In terms of my original title of “age, action research, and analogical thinking”, I see four distinct and attractive active and practical ways forward for seniors. This is not simply a matter of activities in the traditional workplace.

- *Regional development coalitions*, as conceptualized by Gustavsen since 1992, and implemented in Norway through Enterprise Development 2000 and Value Creation 2010, should involve both senior workers and seniors who are recent workers, taking forward processes of enterprise development. This is not a matter of sentimentality, but of ensuring maximum access to implicit and tacit knowledge, through the maintenance of dialogue. Whether the specific subjects under discussion concern age and experience, or whether it is simply a matter of engagement in the process, dialogue membership should continue. This could be facilitated by regional workplace forums, linking wider networks of participants (Ennals 2002).
- *Theatre*, used as an arena for dialogue by Göranson with the Dialogue Seminar since 1987, can appeal to an audience beyond the current workforce, reaching older and younger generations. Theatre and music offer powerful analogies. Arts festivals provide opportunities for collaborative working. Forum theatre, developed in the workplace (Hague 2004), can involve workers, including seniors, in reflecting on their own situations and experiences.
- There is a recognized need for *public spaces*. The English country pub can play a focal role in the community, and provide public space for dialogue outside the workplace (Lindhult 2005). Each country will have their own culturally suitable venues and arenas, such as French cafés and Greek tavernas. As work becomes increasingly mobile, and involves small and micro businesses working together in partnerships, networks and coalitions, social encounters are vital. Here the development of dialogue links in with infrastructure support for mobile work environments.
- Learning is now understood as necessary for workers and citizens of all ages. In many countries we have *Community Colleges*, linked to the Internet, but also benefiting from personal encounters with different external partners. Learning and teaching are brought together through the sharing of experience. My own local Hampton Community College specializes in Performing Arts and Citizenship, and involves the community in joint events, supported by state of the art internet software, which is also supporting work with European partners (Gustavsen and Ennals 2006). A recent Italian evening at Hampton Community College featured an operatic recital from a local plumber, and a rich choice of Italian pasta and wines. From the “University of the Third Age”, we may be moving towards the International Community College, which welcomes the Third Age.

Active Ageing: Potential Project Portfolio

I cannot end a keynote speech without making a substantive proposal.

A Choice of Approaches

There are two contrasting approaches, as argued by Anne-Inga Hilsen based on her work with the Norwegian National Insurance Service.

1. We can treat ageing workers as ill, below the capacity of ideal adult workers, using a deficit model, and measuring work ability. We may seek to remove ageing workers from the workplace, or find arguments to extend their working lives in sectors where this seems economically necessary. This is a matter of HR strategy.
2. We can consider the experience and tacit knowledge of ageing workers. Their work performance tends to remain strong, though they may lack some formal knowledge of particular new technologies. By mainstreaming ageing workers, and enhancing dialogue, we can take forward enterprise development. This is a matter of corporate strategy.

My paper has favoured the second approach.

UK Response

In the UK, such a strategy could be hosted by UKWON, in association with CEWC, and linked to a portfolio of current projects.

- UKWON brings together trade unions, employers' organizations, universities, research organizations and has civil servants as observers. Founded in 1997, it is a bottom-up network and private limited company, with regional networks and a national advisory board. Current sponsors include the European Social Fund. Work on adaptable enterprises includes a strand on healthy work.
- CEWC is based in a community college, and works with national and international partners on education for world citizenship. Founded in 1939, it is a registered charity and private limited company. Current sponsors include the European Commission DG IST, DG Education and Culture, and CEDEFOP. Partners include UNESCO and ICOH.

I cannot speak for the UK government, but as a Board member of UKWON and chairman of CEWC. Adopting a mainstreaming policy means that we can begin without delay.

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