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Learning and developing over the life-course: A sociocultural approach

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ABSTRACT

This article introduces the special issue “Learning and Developing over the Life-Course: A Sociocultural Approach”, which collects six papers stemming from the project “Ages for Learning and Growth: Sociocultural Perspectives” (AGILE), supported by the European Association for Research on Learning and Instruction. Considering that sociocultural psychology has mainly focused on development and learning in children, adolescents or (young) adults, AGILE aims at exploring learning and development in older people’s lives. To do so, theoretical concepts and methodological tools used in research on other developmental periods had to be reconfigured and enlarged. The article first presents the main theoretical and methodological assumptions underlying sociocultural psychology, and shows the challenges of applying them to older people. Each of the six papers (by Aleksandar Baucal, Michèle Grossen, Pernille Hviid, Kyoko Murakami, Roger Säljö, Fabienne Tarrago Salamin, Isabelle Tournier and Tania Zittoun) is then briefly introduced. In conclusion, the article emphasises the importance of accounting for the situatedness of older persons’ activities, the meaning they give to these, and their experience of ageing. Methodologies that recognise the expertise of the persons participating in a study, and include them as active participants, are also called for.

1. Introduction

In most countries in Europe, the USA and in some parts of Asia, the ageing of the population has become a major tendency as well as an issue (Beard et al., 2016; World Population Prospect, 2019), now increased by the COVID 19 pandemic (Moon et al., in press). In public discourse as well as in research, ageing is mostly addressed in terms of economic costs and policies (e.g., retirement policies), social welfare, health and, more recently, in terms of housing and social integration. Social sciences also addressed issues related to cognitive decline on the one side (Thomas, 2020), and on digital exclusion on the other (Gallistl et al., 2020); they also define ways of ageing well, successfully, or positively (Gergen & Gergen, 2001; Stock & Docking, 2019). Even when becoming older is approached from a lifespan or life course perspective, it is rarely conceptualised as a time for learning and development. Research on learning and development has very little questioned this trend: following the founders of the discipline, it usually admits that children and young

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adults learn and develop, adults work (and at time learn through work), and older adults... retire. Unsurprisingly, the same basic assumption guides institutional arrangements: states invest in schools for children, adult education in some cases, and retirement homes and home care for the elderly. What if we question this implicit order of things and propose a different viewpoint? After all, why should we not consider that older adults are engaged in learning, and maybe even more than younger ones? Do they not have to learn daily how to live in a rapidly changing world, to face the transformations of their immediate social network, and to develop skills to orient themselves in their material environment? And what about their longer life: are they not engaged in thinking through their lives, revising their past, and developing plans for the future? Hence, we decided to start our reflection from this basic assumption: older age may also be a time for learning and development.

This interrogation stemmed from a research project that could be carried out thanks to an initiative launched in 2013 by the European Association for Research on Learning and Instruction (EARLI) and called Centre for Innovative Research (E-CIR). This initiative aimed at stimulating innovative research and collaboration among scholars from different countries. In this context, which provided an opportunity to develop a shared project for a three-year period and to stray out from beaten tracks, we submitted a project called "Ages for Learning and Growth: Sociocultural Perspectives". The AGILE project, which began in May 2015 and ended in November 2018, gathered an international group of researchers working in sociocultural psychology (Sanne Akkerman, Pernille Hviid, Kyoko Murakami, Peter Renshaw, Roger Säljö, Valérie Tartas, and the co-authors) together with Dieter Ferring and Isabelle Tournier, who had been working on ageing for many years. This collaboration led to fruitful exchanges and stimulated new ideas, methods and practices in the field of learning and development in older people. Thanks to the EARLI support, we could develop a theoretical framework which fitted the specificity of our research object, reflect about a corresponding methodology, support each other in the elaboration of new research projects and applications. This resulted in the creation of an extremely stimulating thinking space, a skylight of intellectual freedom in a scientific world in which time for reflection cannot be taken for granted. This project also enabled us to develop personal relationships and, in 2017, the sudden passing of Dieter Ferring left us with a deep feeling of grief of a colleague and friend who was an expert in the field of ageing and whose contribution in the team was invaluable.

The AGILE project started from a simple observation: over the past three decades a growing number of studies in sociocultural psychology extended our understanding of development and learning in children, adolescents, or (young) adults. Much research has been carried out on teaching-learning processes both inside and outside the school (Renshaw & Tooth, 2018), on formal and informal learning in diverse contexts, including cyberspace (Ligorio et al., 2013; Psaltis et al., 2015; Ramsten & Säljö, 2012). It expanded beyond childhood to investigate the entry of youth into the job market, as well as adult learning in their workplace (Kloetzer et al., 2015; Masdonati & Zittoun, 2012). However, with a few exceptions (Engeström et al., 2015; Engeström & Sannino, 2016; Stenner et al., 2011; Valsiner, 2017), learning and development of older people remained quite unexplored.

No doubt that such a gap should be filled. A first reason regards the *developmental* assumptions of sociocultural psychology. Sociocultural psychology works on "real-world issues"; it does "concrete" psychology (Kloetzer, 2020; Vygotsky, 1997) which is rooted in the materiality of people's everyday life, accounts for their experience, or works on "situated" learning and development. So, as per definition being a human located in historical time means developing and changing (Valsiner et al., 2009; Zittoun et al., 2013), then a fortiori older people's development should be taken seriously. A second reason pertains to the researcher's *epistemic responsibility*. Indeed, older people are not just characterised by their age or other sociological categories, such as being retired; they do not just raise economical, work or health issues. They form a heterogeneous group of citizens with various knowledge, experience, practices and life trajectories. Moreover, they experience the flow of time in different ways. Hence, it is also a researcher's responsibility to avoid entrenching stereotypes about older people.

Consequently, sociocultural psychology appears to be a good candidate to make an original contribution to the study of older people. Before introducing the papers collected in this issue, let us recall some main theoretical assumptions of sociocultural psychology and show how they can be exploited in the study of learning and development in older people.

2. Sociocultural psychology: a promising candidate for the study of learning and development in older people

Originated from Vygotsky's work (Vygotsky, 1934/2012), sociocultural psychology takes learning and development as core research objects for both theoretical and practical reasons. In the scientific context of his time, Vygotsky's major challenge was to propose an alternative, at one end, to theories that considered development as mere biological maturation, at the other end, to theories that described development as accumulation of learning through repeated exposure to a certain environment. He also questioned Piaget's alternative proposition to consider adaptation as a key developmental process, a process which draws on a biological metaphor. Considering the formative role of culture and social interactions in human life, Vygotsky considered learning as constrained by development, yet as preceding and creating developmental changes. Social interactions lead to personal appropriation and the use of social and cultural artefacts (symbolical, material, technological, etc.). In their function of psychological tools, they qualitatively transform psychological functions as well as their organisation. Studies inspired by these ideas were mostly focused on childhood and adolescence; however, in our view, Vygotsky's theoretical framework is also relevant for researching learning and development in other periods of life.

A first assumption is that learning is conceived of as a situated *activity* that takes place in a certain socio-historical time and context. Hence, studying learning requires to consider the *context* of learning (notably the institutional context, e.g., Mäkitalo et al., 2017), the *setting* which, at least in formal learning, has been designed by someone to produce learning (Ludvigsen et al., 2011), the *social actors* (teachers, other adults or peers) who are involved in the activity (Baucal, 2013), and the *artefacts* and *semiotic tools* that are available in the learning process and are likely to support development (Baucal, 2012). Such a view entails a change of the basic unit of analysis to consider in order to account for learning processes (Säljö, 2009, in press; Wertsch, 1991). Consequently, research on older people

should focus on *units of analysis* that exceed the individual and include these various constitutive elements (cf. special issue in this journal on units of analysis by Damşa & Jornet, 2020).

A second assumption, which is also in line with a pragmatic and interactionist approach to the human mind, is that learning is not limited to cognitive operations, but is rooted in a *set of practices* that take place in a certain context, have social meanings, take on a personal sense for the learners, and result from their active orchestration of personal and social resources. In this perspective, learning practices are *experiences*; they are embodied, they go together with feelings, emotions, representations (Muller Mirza et al., 2014; Vadeboncoeur & Collie, 2013); they can also be experienced, watched or talked about by other people, thus creating sharedness, controversies and social links. Applied to the study of learning and development in older people, this assumption advocates for a better knowledge of older people's *actual* practices and experience in various social situations. Working on situated practices also entails paying attention to time dimension (Gillespie & Zittoun, 2013; Säljö, this issue; Tartas et al., 2016). On a *macro-historical level*, this implies, for example, considering the position of older people in a given society, social representations about ageing and being "old", stigmatisation processes, institutional policies and regulations that frame older people's life. On a *micro-historical level*, it implies focusing on the psychosocial processes bringing about learning and development over a given period of time.

A third assumption is, as Bruner (1990) put it, that "culture and the quest for meaning within culture are the proper causes of human action" (p. 20). Thus, sociocultural psychology insists on capturing the activity of sense-making by which people interpret and negotiate their environment and experiences, whether through narratives or more generally thanks to the use of semiotic systems available in their cultural environment (Cole, 1996; Valsiner, 2014). Hence, studying learning requires a methodology that accounts for processes of meaning and sense construction and takes, as much as possible, a holistic view on learning. Methods such as *documentation, observation and description* enable us to study learning practices in the concrete situation in which they occur (Mäkitalo et al., 2017). They invite us to consider the context at different levels: personal, interpersonal and relational, but also institutional and cultural, as learning and development in the life course is framed by regulations, policies, and power relations that determine what is possible or not to be learned by persons at a given moment of their life course. Fine-grained *case studies* (Flyvbjerg, 2006; Marková, 2017; Salvatore & Valsiner, 2010; Zittoun, 2017) also provide insight into a persons' experience and account for their life trajectory and changes over time (past-present-future). Last, but not least, *discourse analysis* is a relevant method for understanding how the learner and the teacher (in the broad sense of the term) co-construct the meanings of the object to be learned and reach mutual understanding (Grossen & Muller Mirza, 2020; Littleton & Mercer, 2013; Mercer, 2019). This is to say that sociocultural psychology defines language as a psychological tool that mediates and leads to the development of the person. In this view, language is not just a medium for communication; it is not a direct *ex-expression* of feelings, sensations or thoughts; it is a representation, a *schematisation* (Grize, 1996) of the person's experience that is created by an interplay of different voices (present and absent, personal and collective, promoted or silenced). As a consequence, methods such as life narratives or semi-directive or non-directive interviews provide the persons with an occasion to construct a schematisation of their experience and to develop new insights and opportunities for navigating in possible futures (Muller Mirza & dos Santos Mamed, 2019). Hence, methods drawing on language are also intervention devices that *bring about* development. As can be seen, all these methods pay attention to the persons, their material, cultural and semiotic resources, the social, institutional and historical circumstances of their past and present life, as well as to the temporality of their trajectories and to the others to whom they are related (Elder et al., 2004).

As a last point, let us emphasise that doing research according to these assumptions implies taking time to enter into the persons' actual life and commitments, taking time to gain some understanding of the complexity and contradictions of a person, taking time to find an appropriate researchers' position, taking time to learn from the participants. Put differently, it amounts to doing slow research (Stengers, 2013; The Slow Science Academy, 2010). In addition, doing research along this line underlines that researchers are accountable for the theories they develop and their potential effects on the involved persons. By doing research in "real" situations, they also engage their ethical responsibility (Clot & Gollac, 2017). On an institutional and political level, their presence in a certain field and the outcomes of their studies might, willingly or not, have political outcomes, if they orient the stakeholders' policies toward certain decisions that necessarily empower some persons or groups more than others (Arcidiacono & Baucal, 2020). On an interpersonal level, by approaching a person's experience, researchers make a personal commitment with the persons they meet and interview. More broadly, on a social level, their results, if translated outside of the scientific community, may have some outcomes on social practices and representations. For example, using categories such as "elderly people" is not only a way of saying, but may contribute to spread the idea that the category "elderly people" is an overarching category which blurs all other social categories, and that categories are more important than actual practices. In this light, participative research designs (Engeström et al., 2015; Kloetzer et al., 2015; Mata-Codesal et al., 2020) that favor the participation of the different actors included in the study may be a way of sharing the researchers' epistemic authority. These various elements show that the boundaries between research aimed at constructing knowledge and research aimed at bringing about change (action-research) cannot be clearly defined.

3. Presentation of the special issue

Assuming that sociocultural psychology could contribute along these lines, the AGILE project aimed at expanding sociocultural psychology of learning and development to older people. To reach this goal, the theoretical concepts and methodological tools that have been proposed to account for other developmental periods in the life course have to be recontextualised, reconfigured and enlarged in order to shed light on the specificities of ageing and older people's life experience. The six papers collected in this issue take an exploratory step in this direction and should open up certain conceptual and methodological avenues for future research.

The special issue opens up with a paper by Isabelle Tournier summarizing current contributions and limitations of lifespan psychology and gerontology research to understand ageing. Traditional research has focused on individual performance and has explained

the limitations of learning and development in older people in terms of decline of cognitive processes, memory loss and reduction of attention. Research also has shown that selective compensation processes seem difficult to be set up by older people; even when trained in experimental sessions, they tend to abandon memory supportive techniques. Habits and routines may give people some confidence in daily handling, yet too many routines seem to prevent learning. However, when research opens us to the social, material and affective dimensions of people's life, new explanations seem possible. First, one of the main interrogations of traditional research—the gap between an assumed biological decline in older people, and a stable self-reported well-being—starts to be understood as soon as researchers take into account older people's meaning-making. Second, and most importantly, people's social engagement seems crucial; Tournier reports studies in which older people, healthy or with dementia, declare their desire to learn new things, to engage in new adventures and to be useful to society. Third, this may be supported by people's access to a variety of new technologies; yet it is mainly through socially meaningful and intergenerational relationships that such skills can be supported. Hence, Tournier invites us to further explore older people's everyday life and meaningful social, material and emotional experiences. To support this move, her paper recalls that theoretical limitations and methodological choices are mutually dependent. Thus, it calls for more ecologically valid, collaborative research with older persons. It also shows the continuity between concepts developed in traditional lifespan psychology and gerontology, and those defined in sociocultural psychology.

In his paper, Roger Säljö questions different models proposed to account for the development of human intelligence. He shows that stage models (Piaget's theory, for example), psychometric models, as well as life-span developmental psychology, have all fallen in the same trap. They assume that the unit of analysis required to study development is the individuals and their capacities. They are person-centred and fail to note that individuals live in a changing society in which technology is constantly developing and creates a new environment requiring further adaptations and new competences. What we need, Säljö claims, are *holistic models* that account for the co-evolution of, on the one hand, societal, intellectual and technological changes and, on the other hand, human capacities for thinking and learning. One step in this direction is to consider the *hybrid nature* of human mind, that is, to assume that the functioning of human mind cannot be disentangled from the various artefacts and external resources provided in a society, an assumption close to Vygotsky's notion of "instrumental act". In this light, the unit of analysis required to study development includes both the individuals and the societal resources, technologies, and social activities. Under such circumstances, longitudinal studies become irrelevant, precisely because they fail to grasp the co-evolution of individual and societal development. Moreover, the relation between age and learning (or development) can be questioned, as learning does not depend so much on personal capacities as on the opportunity for the person to participate in social activities based on the use of various symbolic technologies. By defining the unit of analysis as a core issue, Säljö raises fundamental ontological and epistemological questions that lead to no less than a serious questioning of the basic assumptions that guide most of the research into learning and development.

How to approach learning and development in older people today, so as to account both for people's uniqueness in sense making and the reality of the environment in which they live? Drawing both on sociocultural developmental psychology, traditionally focused on youth, and critical approaches to ageing, Tania Zittoun and Aleksandar Baucal reflect on the work achieved in the AGILE project by pointing to the main challenges that a sociocultural approach to ageing should address. In this programmatic paper, they first examine development at three interdependent levels, or scales. First, ageing has to be understood from a sociogenetic perspective, that is, in its evolving societal environment, with its social representations, policies and institutions. Second, people have to be understood from an ontogenetic perspective, in their singularity, as their life unfolds from birth to death. Third, society and people meet in the actual concreteness of daily interactions, which take place in specific settings, implying that learning and development can be observed in their microgenesis. In addition, Zittoun and Baucal highlight two specificities of learning and development in older persons: (1) the societal contexts of ageing change rapidly and differently in various countries; but mostly, older citizens are excluded from policies—regarding housing, health, etc.—which concern them foremost, even though we witness the emergence of older people in public discourse; (2) becoming older implies that people have lived... more years than others! On the one side, this gives people a unique outlook on actual sociohistorical changes; on the other side, it may have brought older people to learn from experience and develop their unique understanding of life. Hence, as a whole, such sociocultural perspective invites to develop a more complex understanding of ageing in society today, which both accounts for, and includes people's unique everyday experiences, lifelong learning and development.

One of the most feared stages of ageing is the move to a retirement home. In their paper, Tania Zittoun, Michèle Grossen and Fabienne Tarrago Salamin examine the move to a nursing home as a transition that can be experienced in different ways. They explore whether and how such transition is liable to become an opportunity for learning and development. Adopting a sociocultural psychology of the life course, the authors conceptualise the transition to retirement home as a reconfiguration of people's spheres of experience, which may challenge their sense of continuity and life-creativity. Their paper reports an exploratory case study in which they engaged in the observation of daily life in a nursing home in a village in the Swiss mountains, and carried out interviews and "walking interviews" with residents. Their analysis proceeds in two steps. First, it identifies the institutional offer to the residents—its norms and rules, and the tension these generate—and the spatial, temporal and material arrangements of everyday life. Such places have, for instance, ascribed functions as social or private spaces. Then, the study examines how people appropriate, use, or make sense of these institutional, spatial, and material arrangements. The analysis shows that people learn to live in a new place by actively recreating places and spaces as personal spheres of experience; for example, a corridor can become "one's little corner" and too rigid mealtimes can be bent. The analysis also shows how people use personal daily objects and pictures as symbolic resources that enable them to reach distal spheres of experience, imaginatively exploring the past, alternative presents and possible futures. In both cases, residents display a creativity that enables them to recreate significant spheres of experiences in this new environment. Through imagination, they manage to maintain or restore a sense of continuity with their past and to open new possibilities for the future.

Drawing on cultural psychology, and more particularly on Cultural Life Course, Pernille Hviid provides an original framework which

clearly opposes theoretical approaches that view ageing as a process of decline and loss. Defining human development as a long-life process, she aims at capturing the persons' experience, that is, their subjective point of view, their "voice from within". Under the lens is the persons' *engagement* in various activities, the *personal sense* they give (whatever their age) to their life events beyond their social meaning, and their *agency*. In line with these elements, Hviid carried out a study in "Danish Grandparents", a movement engaged in the defence of asylum seekers. She conducted six life-course interviews in order to grasp the personal sense the members of this movement give to their engagement, their practices and the flow of life events leading them to this engagement. Her paper focuses on the analysis of one life-course, that of Jens, an 84-year-old man, a former physician recently widowed. Through in-depth interviews, Hviid seeks to understand how Jens' early and late experiences led him to his current commitments. Her interpretation of the data, which was submitted to Jens, points to Jens' critical experiences and reveals a recurrent way of facing these events: challenging collective structures and asserting his point of view and values. His "melody of life", as Hviid puts it, is that of a freedom-fighter. Even though loss and decline belong to Jens' reality, they do not account for what really matters to him, what personal sense he gives to his involvement, and what makes his present life worth living. By taking a dynamic outlook on Jens' life-course, Hviid shows that the permanent and unavoidable tensions between social meanings and personal sense create new opportunities for learning and development.

In an approach close to that of Hviid, *Kyoko Murakami* focuses on retirement as a transition that confronts the person with new challenges and opportunities, and examines how people construe a personal sense of this experience. Drawing on sociocultural psychology and Dialogical Self Theory (DST), she approaches "resilience" as a learning process through which people actively confer a personal sense to disruptive life events. From such perspective, resilience is not an individual ability, but is context-bound: it emerges within significant social relationships and can be supported by a person's uses of cultural elements as symbolic resources. Based on this theoretical framework, Murakami reports an exploratory case-study carried out with Midori, a 68 year-old Japanese woman who retired three years ago. Through in-depth, life-review interviews that pay attention to the non-verbal aspects of the research dialogue, she collects a discursive material which is submitted to a thematic analysis and, drawing on DST, to an analysis of the interviewee's I-positions. First, the analysis shows that Midori interpreted her retirement as opening possibilities for her "lifework", that is, learning to write and engaging into a new activity of writing an autobiography—an activity intended to transmit her experience to her children. Second, Midori learned to become a Japanese teacher. Third, her activities were supported through Buddhism used as symbolic resource. As a whole, the case of Midori illustrates how learning and development can take place in older age, after transition to retirement. Relational agency and uses of resources bring a person to redefine new, vital life goals, which take place within significant relationships, support engagement in new meaningful activities and require to learn new competences and to go through identity changes.

This special issue is, altogether, an invitation to expand the field of studies of learning and interaction to older age (see Zittoun and Baucal, this issue). Adopting a sociocultural perspective, we argue for the need to address this important social and psychological issue through multiple entries. First, as Fournier (this issue) and Säljö (this issue), we have to question the history of our disciplines and the implicit decline associated to ageing. From a sociogenetic stance, this calls for a critical reading of the evolution of our societies and institutions, as well as a deeper reflection on our prejudices, and the way these inform research methodologies. Second, we call for careful analyses of situated interactions implying older persons within their everyday setting. Adopting a microgenetic stance, Zittoun, Grossen and Tarrago Salamin (this issue) have identified the interstices within which learning and development can take place in a retirement home. Such activities can be studied anywhere, in daily life, at home, in the street, whether older people are alone or with others. Third, the centrality of learning comes to the fore when the developmental trajectories of older people are examined. Here, both Hviid (this issue) and Murakami (this issue) propose in-depth explorations of older people's life course; ontogenesis is reconstructed through creative techniques by which people are accompanied in a reflexive stance; in both studies, people's life engagement and continuous learning clearly appear far after retirement.

In our view, it is through the multiplication and integration of such studies that we can develop a closer understanding of learning and development in older people and account for the situatedness of their activities, the meaning they give to these activities and their experience of ageing. Such an assumption invites us to opt for methodologies that take into account the participants' expertise, and to produce a knowledge in which they are better included. This, in turn, may bring us to a deeper theoretical and empirical understanding of learning and development in general, and help us design better environments for learning and development all life long.

Declaration of competing interest

None.

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