


Territorial Development Series



The Evolution of Action Research for Territorial Development

Nurturing an intergenerational
and multicultural environment

Edited by
Patricia Canto-Farachala
and **Miren Estensoro García**

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La evolución de la Investigación Acción
para el Desarrollo Territorial:
nutriendo un entorno intergeneracional
y multicultural

The Evolution of Action Research for Territorial Development: Nurturing an intergenerational and multicultural environment

Patricia Canto-Farachala
Miren Estensoro García

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Orkestra - Basque Institute of Competitiveness
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Chapter 6

Generating Facilitation Capabilities for Territorial Development among Young Researchers: The Case of Orkestra-Basque Institute of Competitiveness

Ibone Eguia Aguirre, Naia Begiristain Etxezarreta, Mikel Gaztañaga Cinto, Claudia Icaran-Díaz de Corcuera, Ane Izulain Alejos, Eva Sánchez-Cambrá¹

Abstract

“Facilitative actors” have emerged as key participants in complex territorial development processes. It has been argued that they have the potential to transform a territory. However, very little has been said about facilitative actors’ own transformation. Furthermore, little work has been done on the training of facilitative actors and even less so within research centres. This chapter aims to address this gap by analysing the case of Orkestra-Basque Institute of Competitiveness, a research centre that has created a process for training young researchers as facilitative actors. Our analysis identifies the factors that have been essential for the emergence, configuration, and consolidation of this training space and proposes a framework for successfully training young facilitative actors of territorial development.

Laburpena

Ikertzaille gazteen lurralde garapenerako errazte-gaitasunak sortzea: Orkestra-Lehiakortasunerako Euskal Institutuaren kasua

Aktore erraztaileak funtsezko eragile dira lurralde-garapenerako prozesu konplexuetan. Badakigu aktore erraztaileak lurraldea eraldatuko duten aktoreak izan daitezkeela, baina erraztaileen eraldaketari buruz gutxi ikertu da. Gainera, aktore erraztaileen prestakuntzak gutxi aztertutako eremua izaten jarraitzen du, eta are gutxiago ikerketa-zentroetan. Kapitulu honek hutsune horri heldu nahi dio, Orkestra-Lehiakortasunerako Euskal Institutuaren kasua aztertuz. Ikerketa-zentro horrek aktore erraztaileak prestatzeko prozesu bat sortu du, ikertzaille gazteei zuzendua. Gure azterketak prestakuntza-prozesu hori sortzeko eta aurrera eramateko funtsezkoak izan diren faktoreak identifikatzen ditu, eta lurralde-garapena errazten duten aktore gazteak arrakastaz prestatzeko marko bat proposatzen du.

¹ Orkestra-Basque Institute of Competitiveness, University of Deusto.

Resumen

Generando capacidades de facilitación para el desarrollo territorial entre jóvenes investigadores: el caso de Orkestra-Instituto Vasco de Competitividad

Los «actores facilitadores» han surgido como agentes clave en los procesos complejos de desarrollo territorial. Se sabe que los actores facilitadores pueden ser actores que transformen el territorio, sin embargo, se ha investigado poco sobre la propia transformación de los propios actores facilitadores. Además, la formación de actores facilitadores sigue siendo un terreno poco explorado, y menos, si cabe, en centros de investigación. Este capítulo pretende abordar esa laguna analizando el caso de Orkestra-Instituto Vasco de Competitividad, un centro de investigación que ha creado un proceso de formación de actores facilitadores dirigido a jóvenes investigadores. Nuestro análisis identifica los factores que han sido esenciales para el surgimiento, configuración y consolidación de este espacio de formación y propone un marco para formar con éxito a jóvenes actores facilitadores del desarrollo territorial.

Generating Facilitation Capabilities for Territorial Development among Young Researchers: The Case of Orkestra-Basque Institute of Competitiveness

1. Introduction

Several authors (Duit & Galaz, 2008; Head, 2022; Head & Alford, 2015) have argued that the world is facing and will continue to face highly complex contexts and problems: climate change, mass migrations, diseases, wars, energy transition, and supply chain disruptions, among others. In addition, those complex problems are emerging amid political and social turmoil in a rapidly changing globalised world (Centeno, Nag, Patterson, Shaver, & Windawi, 2015).

In this context, governments have serious difficulties working in a traditional or hierarchical manner (Papadopoulos, 2003). According to some arguments, “command and obey” does not work when dealing with territorial complexity, and other types of working mechanisms must be developed (Karlsen & Larrea, 2014), as governments have to collaborate with other actors in the territory to achieve sustainable solutions (Colander & Kupers, 2014). However, this collaboration between governments and other stakeholders does not happen automatically, with multiple interests, agendas, or languages making it difficult (Karlsen, 2010). In addition, uncertainty and lack of consensus typically impede the development of a planner-style strategy. Burns (2007; 2014) contends that emergent and systemic solutions should be sought. It is precisely this process of constructing new solutions to which Action Research for Territorial Development (ARTD) contributes. Moreover, ARTD suggests that facilitation can help in such complex territorial development processes and guide various territorial actors to collaborate to seek emergent solutions to shared problems (Costamagna & Larrea, 2017).

As territorial actors, universities are also expected to engage and contribute to addressing complex territorial development processes through all their activities (Larrea & Arrona, 2019; Canto, Costamagna, Eizagirre, & Larrea, 2018). It has been proposed that regional development represents a new third mission for universities, together with the first (teaching) and the second (research) missions (Aranguren *et al.*, 2021). However, the proactive involvement of universities in regional development presents significant challenges. To overcome some of these obstacles, ARTD has made an important theoretical contribution regarding the role of social researchers in this third mission of universities, advocating for their increased engagement in territorial development. Thus, ARTD portrays these action researchers as facilitative actors of territorial development (Costamagna & Larrea, 2017). In addition, they are also actors with their own interests, values, and particular visions of the problems at hand.

In this sense, facilitative actors not only generate conditions so that, through collaboration and dialogue between territorial actors, a solution can be found but also play an active role in constructing strategies to respond to complex problems (Costamagna & Larrea, 2017). Consequently, interaction with a wide range of social actors demands a whole new set of skills or capabilities from researchers, and this calls for a reflection on the need for a capability training strategy for facilitation (Arrona & Larrea, 2022).

Yet, this topic of training capabilities has not been extensively addressed in the ARTD literature (Costamagna & Larrea, 2017). Although some studies have examined how to incorporate training in Action Research and facilitation into master’s and doctoral programmes, in

these instances, capability building typically focuses on attaining an academic goal, such as a doctoral thesis. The literature on how organisations or research centres could train their researchers to transform the way organisation works remains scarce.

Thus, in this chapter, we will address this gap to respond to the following research question: *What aspects of training processes for young researchers contribute to developing facilitation capabilities for territorial development?* To answer this question, we will explore the experience of the six authors of this chapter in the training process for generating facilitation capabilities carried out at Orkestra-Basque Institute of Competitiveness, a research institute created within Deusto University, as stated in the previous paragraph. Orkestra is aimed at both attaining academic goals and transforming the way organisations work and, by extension, ARTD processes. Naia Begiristain's chapter in this book also originates from this training space but concentrates on a specific moment, while this chapter analyses the entire process.

Following this introduction, Section 2 explores the case, looking at the training process's background, design, and contents. In Section 3, we explain the methodology and method used for writing this chapter. Finally, in Section 4, we outline the factors in the process that we believe have enabled the development of capabilities, followed by the chapter's conclusion.

2. Context and the Case: The Training Process at Orkestra for Young Researchers

2.1. Background to the Training Process

Orkestra-Basque Institute of Competitiveness is a research institute established in 2007 at the University of Deusto with the goal of improving regional competitiveness. This transformation objective motivated some of its researchers to seek out new methodologies for the institute, which led them to action research. They then confronted a new challenge: creating action research that addressed the specificities of territorial development processes. To do this, Orkestra formalised collaboration agreements with several public administrations, which provided an organisational framework for the ARTD community to collaborate (Larrea, 2020).

Throughout these years, the ARTD community has developed and flourished both inside and outside Orkestra, thanks to the contributions of scholars, policymakers, and other actors, as well as an organisational structure that has facilitated the development of this community (Alcalde *et al.*, 2017).

In this context, the need to bring on board more researchers arose due to the increase in the number of projects within Orkestra between 2020 and 2021. The institute's direction decided to recruit people with a specific profile: (1) young people who had the opportunity to train and develop within the organisation, (2) individuals capable of responding to the needs of the project they were joining, and who, in addition, (3) had certain personal skills that are important for facilitating ARTD processes². This last requirement responded, on the one hand, to the growing importance given to these types of skills in society (Deming, 2015), and, on the other hand, to the strategic commitment of the institute's direction to recruit people with these skills, which are essential for ARTD processes (Costamagna & Larrea, 2017), and which could, therefore, help strengthen ARTD within the institute in the future.

² There are personal qualities that help in facilitation, particularly those related to the ability to forge ties, seek out dialogue, consensus, etc. (Costamagna & Larrea, 2017).

The six authors of this chapter joined Orkestra in the following way. Eva (Bachelor's in Pedagogy), Naia (Bachelor's in Communication), Mikel (Bachelor's in Philosophy), and Claudia (Bachelor's in International Relations) joined different projects that were already underway at the institute and that used ARTD as the main methodology of the project. Ane (Bachelor's in Business Management and Law) and Ibone (Bachelor's in Economics) joined two incipient projects in the institute that considered the possibility of incorporating ARTD together with other methodologies.

Departing from the assumption that training facilitative actors is possible and can improve the territorial development processes (Costamagna & Larrea, 2017), Orkestra made a commitment to train young professionals to develop their facilitation capabilities. Thus, María José Aranguren, director of Orkestra, and Miren Larrea, senior researcher at Orkestra, both authors in this book and Miren Larrea, one of the main contributors to ARTD, decided to create a training space within the institute to build facilitation capabilities. Although the training process was voluntary, all the new recruits (us) decided to participate.

2.2. Design and Contents of the Training Process

The training space was designed and initially facilitated by Miren Larrea, a senior researcher at Orkestra. The training began in May 2021 with the first three newcomers, and within two months, the rest of the people joined. The sessions took place every other Monday, i.e., two monthly sessions, from 9:00 to 11:00 a.m. in the boardroom of Orkestra's headquarters in Donostia-San Sebastián (Gipuzkoa).

Miren devised this training programme as a three-phase process. In the first phase, which lasted one year (06/2021-06/2022), Miren suggested two readings (articles or book chapters) for each session and also posed a couple of questions around these in order to stimulate reflection and try to relate the readings to the practice in the projects in which each of us was working. Thus, the sessions consisted of reflecting on and discussing the weekly readings in a dialogical way, all facilitated by Miren. In this phase of the process, Miren also invited different ARTD authors (from inside and outside the institute) to several sessions so that we could learn about their contributions to ARTD and engage in discussions with them about their contributions to the methodology. The following chart summarises the first phase of the process by the date of the meetings and themes addressed:

Table 6.1. Sessions of the First Phase of the Training Process

Date	Facilitator and Invited researcher	Theme
06/24/2021	Facilitator: Miren Larrea Invited Researcher: None	Territorial Development and Action Research. Innovation through dialogue. Readings: Karlsen, J., & Larrea, M. (2014). <i>Territorial development and action research: Innovation through dialogue</i> . Routledge.
07/09/2021	Facilitator: Miren Larrea Invited Researcher: None	The Contribution of Action Research to Policy Learning. Readings: Karlsen, J., & Larrea, M. (2014). The contribution of action research to policy learning: The case of Gipuzkoa Sarean. <i>International Journal of Action Research</i> , 10(2), 129-155.

Date	Facilitator and Invited researcher	Theme
09/17/2021	Facilitator: Miren Larrea Invited Researcher: James Karlsen	Regional Innovation Systems. Readings: Karlsen, J., & Larrea, M. (2018). Regional innovation system as a framework for the co-generation of policy: An action research approach. In: A. Isaksen, R. Martin, & M. Tripll (Eds.), <i>New Avenues for Regional Innovation Systems: Theoretical Advances, Empirical Cases and Policy Lessons</i> (pp. 257-274). Springer. Karlsen, J. (2020). Students as territorial development actors: The importance of developing awareness. In M. Larrea (Ed.), <i>Roots and wings of action research for territorial development: Connecting local transformation and international collaborative learning</i> (pp. 135-147). Deusto University Press.
10/04/2021	Facilitator: Miren Larrea Invited Researcher: None	Contribution of PhD Processes to ARTD. Readings: Zumeaga, A., & Zurbano, M. (2020). The contribution of PhD processes to the construction of action research for territorial development. In M. Larrea (Ed.), <i>Roots and wings of action research for territorial development: Connecting local transformation and international collaborative learning</i> (pp. 85-97). Deusto University Press.
10/25/2021	Facilitator: Miren Larrea Invited Researcher: Silvina Romano	University, Territory, and Transformation. Readings: Romano, S. (2019). Slaying my own ghosts: My process into action research. <i>Action Research</i> , 17(3), 344-356. Romano, S. (2020). Conectar la universidad y el territorio en Tierra del Fuego: Propuesta de un marco analítico para el desarrollo de nuevos entornos de IADT en contextos universitarios. In M. Larrea (Ed.), <i>Roots and wings of action research for territorial development: Connecting local transformation and international collaborative learning</i> (pp. 85-97). Deusto University Press.
11/12/2021	Facilitator: Miren Larrea Invited Researcher: Hans Christian	Philosophy of Science.
11/22/2021	Facilitator: Miren Larrea Invited Researcher: Pablo Costamagna	Territorial Development. Readings: Costamagna, P. (2015). <i>Política y formación en el desarrollo territorial: Aportes al enfoque pedagógico y a la investigación acción con casos de estudio en Argentina, Perú y País Vasco</i> . Deusto Publicaciones. Universidad de Deusto. Costamagna, P., & Pérez Rozzi, S. (2015). <i>Enfoques, estrategias e información para el desarrollo territorial. Los aprendizajes desde ConectaDEL</i> . ConectaDEL.
01/10/2022	Facilitator: Miren Larrea Invited Researcher: None	Facilitation. Readings: Costamagna, P., & Larrea, M. (2018). <i>Facilitative Actors of Territorial Development. A Social Construction-Based Approach</i> . Deusto University Press.

Date	Facilitator and Invited researcher	Theme
01/24/2022	Facilitator: Miren Larrea Invited Researcher: None	Capacity Building as an Emergent Strategy to Tackle Complexity. Readings: Costamagna, P., & Larrea, M. (2018). <i>Facilitative Actors of Territorial Development. A Social Construction-Based Approach</i> . Deusto University Press.
02/07/2022	Facilitator: Miren Larrea Invited Researcher: None	The Facilitator as a Change Agent. Readings: Costamagna, P., & Larrea, M. (2018). <i>Facilitative Actors of Territorial Development. A Social Construction-Based Approach</i> . Deusto University Press.
02/21/2022	Facilitator: Miren Larrea Invited Researcher: None	Facilitative Actors of Territorial Development. Readings: Costamagna, P. & Larrea, M. (2018). <i>Facilitative Actors of Territorial Development. A Social Construction-Based Approach</i> . Deusto University Press.
03/07/2022	Facilitator: Miren Larrea Invited Researcher: Patricia Canto-Farachala	Responsible Research Communication. Readings: Canto-Farachala, P., & Larrea, M. (2020). Rethinking the communication of action research: Can we make it dialogic? <i>Action Research</i> , 20(2), 199-218. Canto-Farachala, P. (2020). Responsible research communication as an experimental approach to third-person inquiry in ARTD. In M. Larrea (Ed.), <i>Roots and wings of action research for territorial development: Connecting local transformation and international collaborative learning</i> (pp. 259-273). Deusto University Press.
03/21/2022	Facilitator: Miren Larrea Invited Researcher: Mari Jose Aranguren	ARTD from Leadership and the Managerial Perspective. Readings: Aranguren, M.J. (2020). Organisational leadership to support the development of action research environments in university institutes: The case of Orkestra-Basque Institute of Competitiveness. In M. Larrea (Ed.), <i>Roots and wings of action research for territorial development: Connecting local transformation and international collaborative learning</i> (pp. 259-273). Deusto University Press. Larrea, M. (2018). Changing universities through action research: The dilemma of scope in pluralistic environments. <i>Action Research</i> , 17(3), 400-416.
04/04/2022	Facilitator: Miren Larrea Invited Researcher: Ainhoa Arrona	Soft Resistance and the Pedagogy of the Privileged. Readings: Arrona, A., & Larrea, M. (2018). Soft Resistance: balancing relationality and criticality to institutionalise action research for territorial development. In K. P. R. Bartels & J. M. Wittmayer (Eds.), <i>Action research in policy analysis: Critical and relational approaches to sustainability transitions</i> (pp. 134-152). Routledge. Arrona, A. (2020). "Pedagogy of the privileged"? Reflections on how deliberative policy analysis can help action research to foster transformation from within. In M. Larrea (Ed.), <i>Roots and wings of action research for territorial development: Connecting local transformation and international collaborative learning</i> (pp. 183-195). Deusto University Press.

Date	Facilitator and Invited researcher	Theme
05/02/2022	Facilitator: Miren Larrea Invited Researcher: None	The Approach to Conflict in ARTD. Readings: Larrea, M., & Arrona, A. (2019). Improving the approach to conflict in action research through deliberative policy analysis: a territorial development case in the Basque Country. <i>Policy Studies</i> , 40(5), 492-509. Larrea, M. (2021). We are not third parties: Exploring conflict between action researchers and stakeholders as the engine of transformation. <i>Action Research</i> , 19(1), 110-125.
05/16/2022	Facilitator: Miren Larrea Invited Researcher: Miren Estensoro	Multilevel Governance and Social Innovation. Readings: European Commission: Joint Research Centre, Larrea, M., Pertoldi, M., & Estensoro, M. (2019). <i>Multilevel governance for Smart Specialisation: Basic pillars for its construction</i> . Publications Office. Estensoro, M. (2015). How can social innovation be facilitated? Experiences from an action research process in a local network. <i>Systemic Practice and Action Research</i> , 28, 527-545.
05/30/2022	Facilitator: Miren Larrea Invited Researcher: None	Dialogue with Academia: Different Writing Styles for ARTD Papers. Readings: Larrea, M., Estensoro, M., & Sisti, E. (2018). The contribution of action research to industry 4.0 policies: Bringing empowerment and democracy to the economic efficiency arena. <i>IJAR-International Journal of Action Research</i> , 14(2-3), 164-180. Estensoro, M., Larrea, M., Müller, J.M., & Sisti, E. (2021). A resource-based view on SMEs regarding the transition to more sophisticated stages of industry 4.0. <i>European Management Journal</i> , 40(5), 778-792. Larrea, M., & Estensoro, M. (2021). Governance of Industry 4.0 policies: Making knowledge services accessible for SMEs. <i>Regional Studies</i> , 55(10-11), 1839-1850.
06/13/2022	Facilitator: Miren Larrea Invited Researcher: None	Emotional Dimension of ARTD: Love and Power. Readings: Larrea, M. (2022). Love as an energizing feature of action research for territorial development. <i>Action Research</i> , 20(3), 295-312. Larrea, M., Bradbury, H., & Barandiaran, X. (2021). Action research and politics: Power, love and inquiry in political transformations. <i>IJAR-International Journal of Action Research</i> , 17(1), 41-58.

Source: Own elaboration.

For the second phase (06/2022-10/2022), Miren assigned each trainee a book with different approaches to AR. She chose them by taking into account the approach to action research that each of us seemed to be most connected to following our contributions in previous discussions. We went on to facilitate one session each based on that book. The dynamic was the same as in the previous phase, with each trainee responsible for facilitating a session. On this occasion, the trainee suggested reading a couple of chapters from the assigned book and posed a couple of questions to prompt reflection. These are the dates and the different topics that we dealt with in each session of this second phase:

Table 6.2. Sessions of the Second Phase of the Training Process

Date	Facilitator	Theme
06/27/2022	Ane Izulain	Insider Action Research. Coghlan, D., & Brannick, T. 2014. <i>Doing action research in your own organization</i> . SAGE Publications Ltd.
07/11/2022	Claudia Icaran	Systemic Action Research and the Pedagogy of the Oppressed. Burns, D. (2007). <i>Systemic action research. A strategy for whole system change</i> . Bristol University Press, Policy Press. Freire, P. (1970). <i>Pedagogy of the Oppressed</i> . Herder and Herder.
09/12/2022	Eva Sánchez	First Person Action Research. Torbert, W. R. (2021). <i>Numbskull in the theatre of inquiry: Transforming self, friends, organizations, and social science</i> . Waterside Productions.
09/19/2022	Mikel Gaztañaga	A Broad, Plural, and Historical Look at Action Research. Greenwood, D. J., & Levin, M. (2007). <i>Introduction to action research: Social research for social change</i> . Sage Publications, Inc.
10/03/2022	Naia Begiristain	Dialogue and Action Research. Pålshaugen, Ø. (1999). <i>The End of Organization Theory? Language as a tool in action research and organizational development</i> . John Benjamins Publishing Company.

Source: Own elaboration.

Finally, in the third and last phase (11/2022-02/2023), we were each tasked with designing and facilitating a session freely departing from our own experiences. In this last phase of the training, two newcomers to the organisation who were very interested in this training joined the group, Maddalen Akorta and Sofia Zukhova. The sessions were as follows:

Table 6.3. Sessions of the Third Phase of the Training Process

Date	Facilitator	Theme
07/11/2022	Ane Izulain	Reflection on the Identity of the Training Process and the Group.
11/21/2022	Claudia Icaran	Methodologies to Involve Young People in ARTD Processes: Rich Pictures.
12/05/2022	Eva Sánchez	Epistemic Governance.
12/19/2022	Mikel Gaztañaga	Reflecting on Complexity, Democracy, and Governance.
01/15/2023	Naia Begiristain	Analysis of the Training space through the Rich Pictures Methodology.
01/30/2023	Maddalen Alkorta	Relationships between Action-Research and the Natural Environment.
02/13/2023	Sofia Zukhova	Transformative Research from the Body.

Source: Own elaboration.

3. Methodology and method

Regarding the methodology used to develop this chapter's research process, we must point out that our main methodological framework and reference is Action Research for Territorial Development (ARTD) (Karlsen & Larrea, 2014). Therefore, the methodology during our research process is like a coin because it has two sides; we have been trained in ARTD through the ARTD methodology itself, and we have conducted ARTD to identify the elements of the training process that enabled the generation of facilitation capabilities.

Consequently, in order to write this chapter, an emergent process was created and facilitated by two of the trainees. Starting on 01/24/2022 and continuing until the training ended, this emergent process took place during the last half hour of each session. Furthermore, following the ARTD philosophy, we carried out cycles of reflection-decision-action within that space that finally led us to pinpoint the different factors we will expose in the following section.

Although we had informally shared our positive feelings about the training process, it was not until the writing process of this chapter that we individually and collectively reflected on why that was and what specific features of the training process were contributing to our professional development as facilitators of ARTD processes.

Writing the chapter involved a process of reflection during and after the training sessions took place, and the actual writing process itself also occurred during and after the training sessions. We believe that this form of reflective writing (Ramlal & Augustin, 2020) has allowed us to capture thoughts, experiences, learnings, and feelings in an enriching and constructive way.

In the following section, we will present the results of this inquiry process, which includes literal extracts from statements made by the trainees and the facilitator, which are used as data in this chapter. This information has been taken from the systematisation of this emergent process as well as from e-mails sent to each other throughout the process and personal notes taken during the sessions.

4. Analysis and findings

To answer the research question, 'What aspects of training processes for young researchers contribute to developing facilitation capabilities for territorial development?' a first round of individually identifying the conditioning factors that enabled each author to acquire significant learnings resulted in a long list of elements. At first glance, these elements seem dichotomous and heterogenous, but they were actually concurrent and complementary after a deeper analysis and could be classified as success factors.

We identified two types of factors: structural levers and dynamic levers. We consider *structural levers* to be the elements that act as a prerequisite for the existence of the space, and therefore, they have remained constant throughout the entire training process. Meanwhile, *dynamic levers* are pairings of elements whose presence has fluctuated in the process according to the specific objectives and context of each training session.

4.1. Structural levers

As we indicated in the previous lines, the structural levers are the main pillars on which the whole process has been built; without them, it could not have been sustained over time.

The first of these levers is the *organisational stake*, which translated into approving and trusting in the value of the training process and having resources, i.e., a dedicated space for the training process and a facilitator. This lever is also linked to the next one since the components of the process (the six of us and Miren) and our desire to participate in it can also be considered part of that organisational stake, given that we are part of that organisation. Nevertheless, we believe this to be a sufficiently important element to be taken into account on its own.

Therefore, the second lever is the *commitment* of all participants to be a part of the training process and acquire facilitation capabilities. Both the facilitator and we, the trainees, consistently demonstrated remarkable dedication to the process by completing the weekly readings, actively participating in the discussions and reflections, and taking responsibility for the sessions we were assigned to facilitate, thus creating and making the process advance among all of us.

Last but not least, given that the training was directed at young researchers with no or little facilitation experience prior to the process, the programme's duration of a year and a half, with sessions occurring every two weeks, allowed for the necessary conditions to be created to adapt the training to everyone's needs and expectations.

4.2. *Dynamic levers*

The *dynamic levers* refer to the specific aspects of the training process that we have recognised as essential in creating a meaningful training experience and developing facilitation capabilities within ourselves. While these factors may seem dichotomous initially, we have discovered they actually complement each other. The balance between these elements has significantly contributed to generating facilitation capabilities, and one element without the other would not have had the same effect. Although we present these factors as pairs of elements, they were not present simultaneously in the training. Instead, they emerged at various times, depending on the different objectives of each session and the degree of maturity of the process. These levers are the following:

THEORY AND PRACTICE

A tight relationship between theory and practice was a core element of the training space. Achieving a balance between learning concepts that resonate with the project practice and having a space for reflection beyond daily activities has been key to harnessing the training, formulating questions, and internalising lessons. We connect this lever with Freire's (1970, 1973) concept of *praxis*, where theory is validated through its practical utility. If concepts help to solve problems in the processes, these concepts are integrated into the framework of the participants in the process, thereby enriching it. Over time, they become part of the participants' framework for interpreting reality. This process of assimilation also makes the concept more robust in the theoretical approaches of the researchers.

This close relationship between theory and practice is clearly illustrated in the following statement by one of us in a session dedicated to developing this chapter:

In this training, we've delved into concepts and frameworks that resonate with me and apply perfectly to my practice in territorial development projects. For example, I remember clearly the day we worked on the concept of soft resistance and how it clarified a lot for me regarding this concept. Giving a name to something I was doing to some extent unconsciously has helped me a lot to do it consciously when dealing with some situations in the projects. (A.I., June 27t, 2022)

WHAT AND HOW

In a similar vein, as suggested by Karlsen and Larrea (2014), tremendous efforts were made during the training process to delve deeper into territorial development and *what* an ARTD facilitator is by defining its roles, capabilities, characteristics, and dilemmas, and also *how* to best perform as a facilitator by discussing main challenges and previous experiences provided by expert and experienced individuals. Maintaining the balance between these two elements is very important, as any territorial development process requires a facilitator who is able to have both a product or *what* vision and a process or *how* vision.

We believe that what happened in the May 2, 2022, session is a clear example of how, by working on the *what*, we also always reflected on the *how*. In that session, the facilitator suggested some readings on conflict in ARTD, which led to an extensive discussion about the relationship between facilitation and manipulation. To reinforce the idea that facilitating and manipulating are not compatible, the facilitator posed some questions to inspire our reflection on *how* not to fall into manipulation:

Facilitation and manipulation are separated by a line that sometimes appears thin because the facilitator influences the process. However, this line should never be crossed: (a) What are the characteristics of that line? (b) What indicators can we have to determine if we have crossed it or not? (c) If we ever have doubts about whether we are crossing it, what should we do? (M.L., May 3rd, 2022)

To which one of the participants responded:

believe there are a series of red lines that should not be crossed: (1) Invading the actor's decision space: Sometimes, with the sole aim of ensuring the smooth functioning of the process, the facilitator may offer to assist the territorial actor. This assistance can be provided through objective information to guide the actor's reflection, but under no circumstances should the facilitator make decisions on behalf of the actor. (2) Not explicitly sufficiently outlining the steps in the process: At times, actors may assume certain decisions as valid without being fully aware of them. In these contexts, it is the facilitator's role to perform a double-check to ensure that there is indeed consensus on the steps being taken. (3) Trying to reach the final goal at all costs: To know whether these red lines have been crossed or not, certain control mechanisms can be established; for example, a series of questions that the facilitator can ask when intuition tells them that they may be crossing one of these lines. (C.I., May 4, 2022)

HOMOGENEITY AND HETEROGENEITY

Certain characteristics of the group denoted *homogeneity*, including being newcomers to the organisation, having little experience with ARTD theory and practice, or sharing a common objective. These homogeneities of the group may have initially provided a reassuring sense of security and familiarity, which helped to establish some pillars on which to build later.

Nevertheless, *heterogeneity* in terms of interests and multidisciplinary (we come from six different backgrounds: communication, philosophy, pedagogy, economics, international relations, and law) has also played a considerable role in the process. This heterogeneity meant that, although we all departed from the same articles, our reflections in each session

diverged significantly because of our different disciplines, frameworks, projects, and particular interests. These facts significantly enriched the discussions, bringing something close to a systemic view of the concepts addressed (Burns, 2007, Burns, 2014).

As shown in the following quote, during the training process, participants were aware of the benefits of heterogeneity within the group:

This group is a recreation of the complexity concept we are working on. Thanks to multidisciplinary and co-generation, we are multiplying knowledge. (N.B., January 20, 2022)

The balanced combination of these two elements contributed to the rapid integration of all group participants, fostering enriching discussions that significantly benefited the development of facilitation skills.

PERSON AND ORGANISATION

The training process reinforced a strong individual and group commitment, conjugating personal interests with organisational ones. The key factors in building facilitation capabilities include a positive organisational climate, the ability to learn from each other, accessible resources from Orkestra's ARTD community, and self-reflection (Costamagna & Larrea, 2017). The combination of individual and organisational interests made the learning process meaningful, thus contributing to capacity development.

Each of us understood the training process as a process of individual capacity building. This is clearly reflected in the questions we asked ourselves as a group initially to define the content of this chapter:

What does this training group mean to you? (January 24, 2022)

However, the fact that this group was mentioned as a strategic objective of the institute during a general meeting of Orkestra made us realise the significance of this training taking place within the organisation. We became aware that we were acquiring an identity as a group. Therefore, we redefined our questions guiding the reflection on the content of this chapter.

Why is this space valuable for Orkestra? And for the ARTD community? What elements of the training have helped you develop as a professional? What elements have you gained in this training that could be transferable to another training space? (September 26, 2022)

The evolution of the reflection on the training space—from seeing it as a process of individual growth to viewing it as a process of collective growth with an impact on both the organisation and the ARTD community—illustrates the transformative nature of the training and the awareness that occurred during the process.

COMFORTABLE AND CRITICAL

The duration of the training and the regularity of the sessions allowed us to slowly build a community around the training process for young professionals, creating a space of trust and openness where participants felt taken care of. This factor was crucial throughout the

entire training process, but especially during the first months when we were becoming familiar with a new methodology of which we had no prior knowledge. The sense of ease and closeness that was generated from the beginning enabled an open dialogue free of complexes, fears, and judgements.

An example of this sense of ease that we all felt was when one of the participants who was responsible for facilitating a session had the confidence to share a document she had written, analysing an organisational change she had experienced first-person in her previous workplace, which enriched the topic we were discussing. This would not have been possible in a context lacking such ease and comfort.

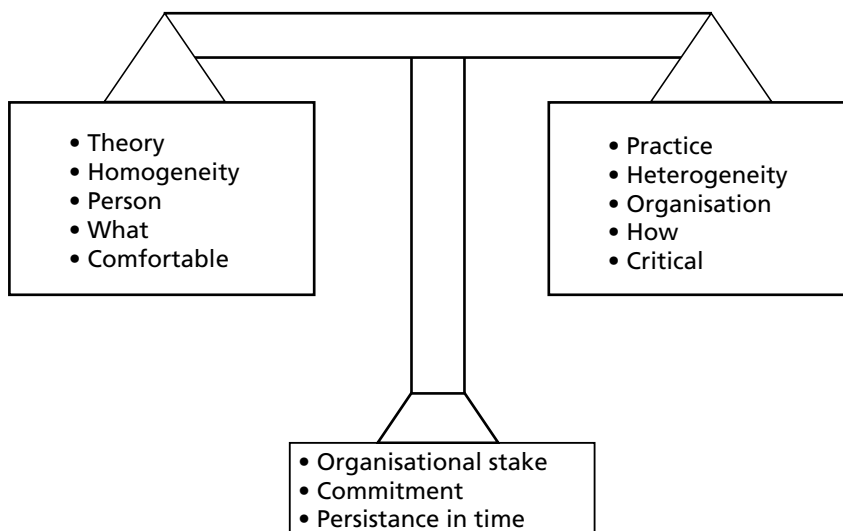
Nevertheless, this comfortable, dialogical, and horizontal space also triggered honesty and critical thinking (Freire, 1970). An instance of this can be seen in the honesty displayed by one of the participants who, from the very early sessions, raised questions and reflections, showing his scepticism towards ARTD, sparking critical thinking among the group from the very beginning.

I come from philosophy, history, and international relations. Therefore, initially, the foundations of action research, the practices, and the methodology surprised me. I didn't understand it well. I had my doubts. It seemed more like consultancy work than research. That's why I didn't have confidence in the validity of action research at first. However, after the training process, when I participated in action research projects and also learned about other projects not based on action research, I now see more clearly the contribution of this methodology. It still raises some questions for me, but just like other research methodologies do. (M.G., May 16, 2022)

Therefore, this combination of a comfortable and critical or reflective space has been central to the learning process.

The following image summarises the classification of the framework identified as the main features of training processes within organisations, which enable the construction of facilitation capabilities for territorial development.

Figure 6.1. Framework to Successfully Train Young Facilitative Actors of Territorial Development



Source: Own elaboration.

5. Concluding reflections

This chapter aims to illustrate how our training process has been shaped and developed. We have presented and reflected on the conditioning factors that have enabled the generation of the necessary capacities for us to become facilitators of territorial development.

All the elements described in the previous section did not occur in a vacuum but rather are the consequence of and thanks to the following factors that enabled them: (1) The facilitator of the whole process (Miren Larrea) always kept in mind the principles of ARTD for the design of the training; (2) The facilitator's commitment to facilitate and her leadership during the whole process; (3) The individual characteristics of each of us; and, (4) The collective dynamics that were created throughout the process among all the participants.

We are aware that this analysis has its limitations in that these capabilities were not exclusively generated in the training space. The territorial development projects in which each of us participates within Orkestra have been fundamental in our learning process, with the practical use of theoretical knowledge in projects making it possible for us to test and develop the skills acquired throughout training. On the other hand, we are also aware that these are only the factors that we have detected based on our perceptions, but obviously, these elements do not constitute the whole of the training process.

One-size-fits-all strategies do not work for territorial development; in practice, solutions have to be created each time for each territory. This is also true for training processes like this. In our case, we believe that the factors identified have made our training process transformative, fruitful, and inspiring, but we know this is not a unique formula for every training process. Further learnings could be drawn from a comparative case study with analogue experiences.

However, we think that training processes such as the one we have experienced, i.e., with a non-linear way of generating knowledge based on dialogue, critical reflexivity, and the factors described in the previous section, can offer a suitable basis for developing facilitation capabilities. Therefore, despite the uniqueness of this case, we believe it can serve as a source of inspiration for designing similar processes.

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