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Abstract

Purpose – This paper aims to demonstrate how the Nordic model, featuring highly regulated trade union – employer collaboration, has enabled the building of learning organizations through a co-generative learning model involving both practitioners and action researchers.

Design/methodology/approach – A literature search on the Nordic sociotechnical systems tradition led to a further search based on the snowball method. This paper reveals how the unique features of the Nordic model for work life through union–management relations constitute a formal system for building learning organizations.

Findings – This paper acknowledges the difference in power that exists between the social parties within the Nordic model. However, the practice is not due solely to the political structure in which trade unions, employers' associations and the state form a tripartite collaboration, and thus, create a framework for workplace collaboration. This tripartite collaboration has enabled the development of an organizational practice by action researchers, union representatives and companies over several decades.

Originality/value – Limited literature has explicitly linked the formal structures of the Nordic model of work life and the effort to develop learning organizations. This paper addresses criticism that the research field has not fully considered power issues when developing a learning organization. It demonstrates how the Nordic model as a formal structure creates a system of democratic norms and rules that facilitates a safe arena for employees to invest their effort in co-generating a learning organization.

Keywords Sociotechnical systems, Learning organization, Nordic model,
Co-generative learning model, Industrial democracy, Action research

Introduction
Within organizational studies and studies on organizational learning, the different approaches to employer and employee interests are often presented as unitarist versus pluralist perspectives on organizations. Within the unitarist perspective, organizations are unitary structures characterized by harmony and trust where employers and employees share common interests. In contrast, a pluralist approach assumes that employers and employees have different, and sometimes conflicting, interests. Given the inevitable conflicts between employers and their employees, there is a persistent need for employees to exercise their voice to defend their interests and rights (Field, 2019; Fox, 1966; Geare et al., 2014; Van Buren, 2022).

Field (2019), in a critical review of the learning organization, demonstrated how the leading theorists from the early phase of the learning organizations literature, such as Senge (1990) and Argyris & Schon (1978), took a unitarist approach and saw conflicting interests as problematic when building a learning organization. For example, Senge (1990), in his classical work The Fifth Discipline, depicted reluctance to share knowledge as a "reeking odor" and a "perversion of truth and honesty" (Field, 2019, p. 253), whereas Argyris (1992) claimed that "political activity only amplifies competition and mistrust, resulting in win-lose situations and more 'politicking' which leads to errors rather than organizational learning" (Field, 2019, p. 253). In addition, Coopey (1995), in his review of the learning organization, argued that most of the literature from the early stage of the research field downplayed the power dimensions in learning organizations, creating the impression that power is distributed equally within the organization. Field (2019) commented that although power was considered in a range of studies in connection with organizational learning during subsequent years, the relationship between different interests and organizational learning is yet to be fully elucidated. In line with this, Örtenblad (2002) argued for a radical perspective of organizational learning in which employee emancipation is an ideal. He argued that to guarantee this kind of freedom, "the organization needs to have a formal system of democratic norms and rules facilitating the climate of freedom" (Örtenblad, 2002, p. 96).

The Nordic approach to union–management relations is often considered a hybrid approach or a "third way" between the pluralist assumptions and the unitarist approach. At the organizational level, the Nordic model represents the delicate balance between collaboration based on collective rationality and acknowledging the inherent conflict of interest between capital and labor. Factors crucial for the model include a high degree of organization among both employers and employees, powerful social parties within work life and governance and collaboration at the societal and workplace level (Finnestrand, 2011). Gustavsen (2008) argued that agreements on workplace development between social parties in work life have "encouraged management and workers locally to develop an active relationship to learning and development issues and offer some assistance to those who wanted to make an effort" (p. 426). For decades, this has enabled a structure for a variety of co-generative learning models and democratic dialogue projects throughout the Nordic countries (Gustavsen & Engelstad, 1986; Levin, 2002).

This article unveils how the unique features of the Nordic model for work life through union – management relations constitute a formal system for building learning organizations that acknowledges the difference in power that exists between the social parties. However, this practice did not arise solely from a political structure in which trade unions, employers' associations and the state form a tripartite collaboration and thus create a framework for workplace collaboration. The tripartite collaboration has enabled the development of an organizational practice by action researchers, union representatives and companies over several decades.

This article describes how the co-generative learning approaches that characterize the Nordic model establish a formal system of democratic norms and rules facilitating a safe arena in which employees can invest their effort in co-generating a learning organization. The article first explains the historical

and theoretical assumptions for the co-generative learning model. These theoretical assumptions are then discussed against the understanding of organizational learning before the model is introduced and discussed in its entirety. Finally, some examples of cases where the model has been applied are presented.

Historical and theoretical assumptions of the co-generative learning model

Sociotechnical systems theory

Trist & Bamforth (1951) introduced a new era in organizational studies. A study of new mechanical equipment in English coal mines demonstrated the inextricable link between production technology and work organization. Their seminal study gave rise to the study of sociotechnical systems (STS), an approach linked to the Tavistock Institute that recognized the inevitable interaction between people and technology in workplaces (Trist, 1981).

An important design principle in STS, which was emphasized by Philip Herbst (1974, 1993), is that decisions should be made at the “lowest” organizational level possible, as understood through the traditional organizational hierarchical tree. Rather than specialists, engineers or supervisors making decisions about day-to-day corrections and changes to the production process or production line, the operators themselves, when suitably trained, should identify the corrections and implement the changes. Herbst (1974) recognized that workers themselves are best positioned to improve their work.

Such worker autonomy is built on the organizational design idea of minimum critical specification (Herbst, 1974). This emphasizes learning as an ongoing problem-oriented process that is closely linked to daily work (Molleman & Broekhuis, 2001) and involves design choices such as moving from redundancy of parts to redundancy of functions (Boog, 2003; Cherns, 1976; Weisbord, 2012). Herbst (1974) used the notion of the learning organization as a “learning system” before Argyris & Schon (1978) popularized it as a research domain (Amble, 2017). Herbst (1974) described how a traditionally hierarchical ship organization was reorganized into a matrix system in which the staff on the ship were responsible for its daily operation, thus enabling them to learn about their work process. The new work practice was developed within the entire organization and became what Herbst (1974, 1993) called a learning organization in practice. In this way, Herbst’s contribution to STS was strongly related to the theories of organizational learning and the learning organization, which emerged in the second half of the 1970s and into the 1980s (Klemsdal, Ravn, Amble, & Finne, 2017).

Industrial democracy

Although associates of the Tavistock Institute developed a solid foundation for sociotechnical design, poor employer–trade union relationships in Great Britain rendered experimentation in the organization difficult. Authorities such as the National Coal Board were highly suspicious of the intentions of STS and responded negatively to the idea (Gustavsen, 2008). However, in Norway, an extensive formal political infrastructure supported participation in work life through union–management agreements, creating a suitable context for STS (Elden & Levin, 1991; Pålshaugen, 2014; Qvale, 1976). Consequently, Norwegian researcher Einar Thorsrud and Tavistock Institute associate Fred Emery instigated a research project focusing on the democratization of work in practice. This was supported by the Norwegian Confederation of Trade Unions (LO) and the Confederation of Employers (Emery & Thorsrud, 1976) and was called the Industrial Democracy Program. During the 1960s, STS researchers had already observed the potential in the representative labor–management structure when working with organizational development.

Action research

A joint committee comprising the LO, the Confederation of Employers and researchers from

the Institute of Industrial Social Research in Trondheim and the Tavistock Institute suggested the development of this initiative into an action research (AR) program that would “[explore] the possibilities for making changes in the concrete work situation in industry and thus giving a basis for personal development, learning, and involvement, as well as better utilization of the human resources” (Qvale, 1976, p. 455). AR is often described as “social research carried out by a team that encompasses a professional action researcher and members of an organization, community, or network (‘stakeholders’) who are seeking to improve the participants’ situation” (Greenwood & Levin, 2007, p. 3). Organizational psychologist and “founding father” of AR, Kurt Lewin, argued that the human condition can only be improved by resolving social conflict (Marrow, 1969). Thus, democracy must be built into all parts of society, including organizations and workplaces. In Lewin’s view, the key to resolving social conflict is to facilitate planned change through learning that enables individuals to understand and restructure their choices (Sarayreh, Khudair, & Barakat, 2013). In practice, Lewin’s approach to learning and organizational development is synonymous with a natural experiment. Researchers invite participants to take part in an experimental activity in a real-life context (Greenwood & Levin, 2007). Learning is understood as an interactive process based on a desire to develop the understanding of learning from practice by studying practice (Sidani& Reese, 2018).

The Industrial Democracy Program was the first initiative in which the experiences from the coal mine studies in Britain could be implemented as an AR program with political and institutional support. The Norwegian setting, as discussed earlier, was considered to provide the best conditions for what was expected to be a radical change program (Qvale, 1976), and it enabled organizational design based on the democratic idea (Gustavsen, 1992). These initiatives in Norway were followed by similar schemes in Sweden (Sandberg, 1981) and Denmark (Agersnap, 1973). The Industrial Democracy Program also inspired a series of collaborative AR projects and programs on organizational development from a Nordic perspective (for an overview, see also Engelstad & Gustavsen, 1993; Finsrud, 2009; Levin, 2002). The projects incorporated “all levels” of working life in the discussions, which led to a “descending order of agreements, conflict resolution mechanisms, training programs, information campaigns, and more, until the workplaces were eventually reached” (Gustavsen& Pålshaugen, 2015, p. 411).

Worker autonomy

Lorenz & Valeyre (2005) argued that these industrial democracy initiatives paved the way for the development of a learning organization, with autonomy in work as its main enabler (Eijnatten, 1993; Emery & Thorsrud, 1976). However, autonomy in work is seen as “a prerequisite for joint learning grounded in the need for all concerned to grant each other a certain amount of freedom to be able to build mutual trust” (Gustavsen, 2006, 2007, p. 651). Work design enables learning at the shop-floor level by encouraging worker autonomy, minimal critical specification of work tasks and redundancy of functions. However, although these design principles might produce a learning organization (Herbst, 1974), they do not necessarily focus on or describe organizational learning (Kira & Frieling, 2005). As we will see, these perspectives are closely linked.

Relationship between the theoretical assumptions and organizational learning

In an interview with Sidani& Reese (2018), Karen Watkin, a well-cited learning organization researcher, observed the separate treatment of organizational learning and the learning organization in the literature. While the organizational learning literature has focused on describing how organizations behave, the learning organization literature has considered how to develop these capacities. “These two literature areas have to be put together: You can’t teach without understanding how students learn [. . .]. [Likewise] I don’t think you can develop an organization’s capacities without having some idea how a collective learns, [or] what does it look like” (Watkin, as cited in Sidani& Reese, 2018, p. 201). This means that efforts to develop a learning organization are built on a particular epistemological and ontological approach to

organizational learning. Within AR, organizational learning rests on an epistemological foundation wherein learning takes place in a construction process in action with others (Klev& Levin, 2012; Levin, 2004).

In this respect, Edmondson & Moingeon (1998) built on Schön's (1983) perspective of the "reflective practitioner" in their definition of organizational learning. They viewed organizational learning as a process that both requires individual cognition and supports organizational adaptiveness. This way, they emphasized the AR approach to change in which the participants act, assess the results and act again based on their acquired knowledge. There is an ongoing cycle of reflection and action, and Edmondson and Moingeon (1998) argued that this learning process cannot be taken for granted in organizations. However, they also claimed that organizational learning is a process that can be initiated, developed and practiced, which brings us to a discussion of how one prepares for a learning organization within this approach.

Edmondson and Moingeons's (1998) definition of organizational learning aligns with the AR circle (Figure 1) of planning, acting, observing and reflecting. Kemmis, McTaggart, & Nixon (2016) described this as a learning spiral, or a learning circle that operates many times throughout a project. The circle begins with planning a change, proceeds with acting and observing the processes and consequences of that change, further continues with reflecting on those processes and consequences, and then cycles through re-planning, acting and observing, reflecting and so on in a continuous process of action and learning. This makes AR a cyclical process, where reflection upon an action leads to new learning points and changes in practice, which again leads to extended questions and further action (Ip, 2017).

As mentioned above, the industrial democracy initiative in Norway, which spread to other Nordic countries, introduced AR and the importance of bringing industrial democracy to STS. The development of STS design in other countries – notably The Netherlands – has been criticized for being overly dominated by expert knowledge introduced from outside the organization (Sørensen, 1985). Sitter, Hertog, & Dankbaar (1997, p. 499) explained that because of "this overdependency on external experts and external ideas, projects did not become self-propelling, nor did they work out as 'self-selling' examples of best practice." However, in Nordic countries, STS has advanced a step further into a process- and learning-oriented rather than a structure-oriented approach, with emphasis on the developing industrial democracy in which members develop their own local theory (Sitter et al., 1997).

Source: The above figure is an adaption of Kemmis et al. (2016)

Figure 1. The AR circle

STS is notably carried out through different participative designs such as search conferences (Herbst, 1980) and/or dialogue conferences (Gustavsen & Engelstad, 1986). This process-focus is built on two key features: participation and collective reflection (Levin, 2004). Procedurally, this is constructed around a co-generative learning model (Elden & Levin, 1991; Greenwood& Levin, 2007; Klev&Levin, 2012; Levin, 2004).

Prerequisites for a co-generative learning model

The co-generative learning model was initially developed by Elden & Levin (1991) as a conceptualization of participative AR and the Nordic take on STS. A premise of AR is that both the researcher and the problem owners participate in the same learning process. Thereby, the process is built on democratic ideals, with broad participation as a basic premise. The co-generative learning model fulfills the function of modeling the organizational development process as a learning process. It embraces the elements of the organizational development process, the link between the process elements and a clarification of the learning process itself (Klev& Levin, 2012).

Creating new social realities based on real-life challenges

In practice, the process of developing a co-generative learning model starts with a problem definition based on real-life challenges in which the insiders and outsiders "co-generate an identification of the problem through dialogue" (Levin, 1993, p. 197). Insiders are local participants, and outsiders are often – but not necessarily – action researchers. According to the model, the participants create new social realities (Berger & Luckmann, 1967) through discourse that encourages and supports learning. This means that the participants must get to know each other, develop a basis of trust, shape the first concrete action alternatives and seek to learn together (Klev & Levin, 2012).

Facilitating democratic dialogues

The co-generative learning process is based on democratic dialogues (Greenwood & Levin, 2007; Gustavsen, 1992). Levin (1993) stressed the importance of dialogue free of dominance by researchers, who may have technical expertise and communication skills but lack contextual knowledge. Levin proceeded to argue that learning from the process occurs in at least three ways:
(1) Learning may occur directly during the occurrence of democratic dialogue.
(2) Learning emerges from reflection on the outcomes of different actions.
(3) The experience of writing about outcomes creates a new understanding in a different and more structured system. In the research process, both the accomplishment of goals and the reflection process involve intensive group interactions. The collective action itself becomes a learning experience (Levin, 1993).

Offering dual learning cycles for continual learning

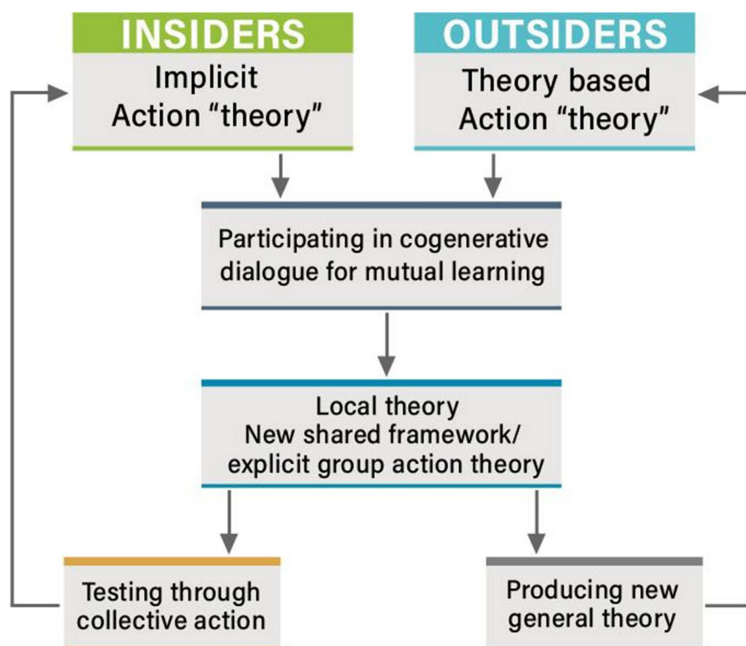
The defined problem situation motivates experimentation through the AR circle, in which the goal is to find new and better solutions that, through the reflection processes, create collective and shared learning, which again enhances further experimentation and learning. The experimental cycle shapes the ground for continual learning. The process involves outsiders as facilitators who have the skills to direct learning opportunities. These outsiders, thus, become partners in the local learning system.

The co-generative learning model is characterized by dual learning circles (the insiders' and the outsiders' cycles) that both interact and are separate. Outsiders experiment and learn together with insiders. This means that insiders and outsiders both enjoy learning opportunities of their own (Levin, 2004). These ideas are encapsulated in Figure 2. The co-generative learning model recognizes that people supply their own ideas, models and frameworks to attribute meaning and explanations to the world they experience. People who spend their working lives in a particular organization become

familiar with its context and have more ways of making sense of their world than would be possible for an outsider to appreciate without somehow becoming an insider (Elden& Levin, 1991). The co-generative model as a framework for organizational learning paves the way for mutual learning between employees and employers by enhancing and making use of local theory, creating a new shared framework and eventually creating a new general theory and further action. The co-generative learning model considers the differences in power that may exist in an organization and emphasizes giving a voice to those without power. AR and the co-generative learning model can be seen as a response to those who have asked for that which Örtenblad (2002) called a radical perspective on the learning organization (Flood & Finnestrand, 2019).

Enabling collective reflection between insiders and outsiders

Whether a learning organization can be created through the co-generative learning model depends to a large extent on what Greenwood & Levin (2007) called the role of "the friendly outsider." The friendly outsider emerges in the initial phase of the developmental activity as the actor responsible for the design of the process (Levin, 2004). They should be able to offer participants insight into themselves in a manner that is considered supportive rather than negatively critical. In addition, the friendly outsider should be an expert in opening lines of discussion and making evident tacit knowledge that guides local conduct (Greenwood & Levin, 2007).



Source: The above figure is an adaptation of Elden and Levin (1991)

Figure 2. The co-generative learning model

Furthermore, the friendly outsider should be able to help local people to see or recognize the resources they possess locally, and be able to articulate problems that are difficult to talk about (to speak the locally unspeakable). Therefore, Greenwood & Levin (2007) built on Argyris & Schön (1996) notion of developing open feedback to generate new possibilities for action in particular social arenas (Greenwood& Levin, 2007).

It is important, though, that the co-generative learning model involves insiders and outsiders in a collective experimentation and learning process. As highlighted above, friendly outsiders are the actors responsible for the process design. This includes preparing arenas for collective reflection, ensuring that experimentation takes place and engaging actors in reflection on the results of the

experimentation. The critical action for the friendly outsider is to create room for collective reflection by appreciating who is to be involved, the problem situation, the local competence levels and the learning potential for participants (Levin, 2004).

Although several cases exist where the co-generative learning model has been used in other contexts (see, for example, Levin, 1993; Rubach, 2011 and Harris & Ellul, 2017), the model relies heavily on the AR perspective of building democracy at work, also called industrial democracy. Creating a learning organization through co-generative learning is based on a normative belief that learning and development lead to "good-quality jobs." Accordingly, Elden & Levin (1991, p. 3) emphasized that outsiders in the co-generative learning model must have clear value commitments to the democratization as well as the vision of the "good organization" based on self-management, the development of human potential, power equalization and democratic principles. In addition, they argued for well-developed and proven tools and concepts, such as STS, to design and redesign organizations to achieve visions and values. Finally, Elden & Levin (1991) emphasized the need for extensive formal political infrastructure supporting participation in work life, as reflected in specific labor legislation and national labor–management agreements, such as the Nordic work life model. This brings us to the Nordic work life model as a structural framework for co-generative learning organizations.

Co-generative learning models built on a hybrid approach to union – management relations

As we have seen, the Industrial Democracy Program explicitly aims to contribute to the democratization of work life (Emery & Thorsrud, 1976) and forms the foundation for the development of some of the main AR traditions in the Nordic countries today (Greenwood & Levin, 2007; Gunnarsson, Hansen, Nielsen, & Sriskandarajah, 2016; Pålshaugen, 2014). This is enabled by various social and institutional conditions, such as a relatively high rate of unionism among employees within organizations as well as organized companies in employer associations (Kjellberg & Nergaard, 2022; Løken & Stokke, 2009). There is also a formal structure of collaboration for increased value creation as a parallel process to bargaining and conflict resolutions (Bergh, 2010), considered a hybrid approach between a unitarist and pluralist approach to employer – employee relations (Van Buren, 2022).

This has enabled a variety of co-generative learning models and democratic dialogue projects throughout the Nordic countries for decades through its work life institutions, the most notable of which are probably the Swedish program "Leadership, Organization and Participation" (Swedish abbreviation: LOM) and the Norwegian programs "Enterprise Development 2000" and "Value Creation 2010" (Björk, 1992; Gustavsen&Engelstad, 1986; Levin, 2002).

In line with this, much of the development of AR projects has been funded by the unions and employer organizations in work life, thus legitimizing the AR focus on democratization and work life changes (Poulsen & Buland, 2020) down to the organizational level. However, the hybrid approach between the pluralist assumptions and the unitarist approach to union – management relations has proven to contribute to a learning organization. The trade unions already hold regular meetings that are set out in the main and supplementary agreements between employers' associations and the various unions. This constitutes an arena for information sharing and discussion, which in organizations with well-established union – management relations is used to discuss issues that fall outside the requirements set out in the main agreement (Øyum et al., 2010). Furthermore, the unions hold regular general meetings with their rank-and-file members, and trade union representatives who are closely involved in the company's development projects can inform and include the members in these projects. Union representatives can also answer and address critical questions from members of the organization, and plans and strategies can be explained so that everyone understands them. Learning is not restricted to those who participate directly in the projects; instead, through the active use of the trade union apparatus, it contributes to

organizational learning. In other words, the union representatives became "channels of communications" (Finnestrand, 2011, p. 168). It is nevertheless more important that the members select the union representatives they wish to represent them in meeting the management's expectations and demands. A shop steward has little power over his rank-and-file members. Thus, while company managers have sanctioning options against employees, the opposite is true concerning union representatives.

Summary and implications for research and practice

This article has aimed to show how the Nordic model featuring highly regulated collaboration between trade unions and employers has enabled the building of learning organizations through a co-generative learning model involving both practitioners and action researchers.

The STS movement of the 1950s was a reaction against the Taylorist way of organizing work. By insisting that all planning and managerial work should be moved from the shop floor to various planning departments, the Taylorist organizational design rendered the workers more or less alienated from the work process. Within a sociotechnical design, however, emphasis was placed on a high degree of workforce involvement. The organizational design emphasized that those closest to the problem had to be able to solve such problems when they arose. For this to succeed, workers had to understand why the problems arose, how to solve them, and how to prevent their reoccurrence. Employees must, therefore, receive the necessary training and be organized in such a way that they can see and understand the whole of the organization. One of the sociotechnical pioneers in Norway, Philip Herbst, referred to this as a learning organization in practice (Amble, 2017; Herbst, 1993). In other words, the sociotechnical organizational design is based on being a learning organization.

However, even if a so-called organic design such as STS focuses on empowering employees to participate in development and learning, the freedom to do so has certain limitations. Critical voices within the learning organization field, such as Örtenblad (2002) and Flood (1998), have pointed out that learning in a learning organization is rarely free and democratic, as the management in most cases controls the learning process. It is perceived as difficult for an individual in an organization to be a critical voice. Örtenblad (2002) concluded that organizations require a formal system of democratic norms and rules that facilitates a "climate of freedom" (p. 96). In this article, I have argued how the Nordic model's perspective on union–management relations has proven to be such a formal system. However, a formal system is only a framework; it must be enabled and maintained to be ready for learning and development. Through various forms of the co-generative learning models where action researchers have played an active role in facilitating a democratic dialogue, a practice has developed that has enabled organizational learning. Trade unions and their representatives occupy a position from which they can address topics and issues that are perceived as too demanding for the individual. Trade union leaders thus play a very different role from that of formal managers. While the managers are chosen by the owners, the trade union leaders are elected by their rank-and-file members to represent their views and needs (Finnestrand, 2011). In this way, they act as a potential counterforce against management control and facilitate a climate of freedom for the individual employee.

Unfortunately, the Nordic model is under pressure. As seen in most other countries, the Nordic countries are also witnessing a percentage decline in trade union membership, notably among the traditional blue-collar unions. This could potentially weaken the Nordic model. However, Ravn & Øyum (2020) noted that the decline is not dramatic if you include all trade unions and not solely the blue-collar unions. In addition, the traditional two-party co-generative learning project, where a blue-collar workers' union forms one party and the management the other, is now becoming "multi-collar," suggesting an expansion of those involved to include many different trade unions. In an industrial setting, this would typically be trade unions representing the entire workforce spectrum,

including engineers, transport workers, middle managers and office workers, to name a few. This is exciting because it paves the way for new forms of co-generative learning models aimed at organizational learning in a climate of freedom for everyone in the company, not just those in the top and bottom layers of the organization. This avoids middle management from becoming what Holmemo & Ingvaldsen (2016) described as "the missing link" when developing the organization. To safeguard this Nordic approach to the learning organization in the future, it will be important to develop co-generative learning models that consider – and are sufficiently flexible – to meet changes in the structural relationships in society and within the organizations.

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