

## Editorial: Social Worlds, Arenas, and Situational Analyses: Theoretical Debates and Experiences From Research Practice

*Ursula Offenberger, Renate Baumgartner, Tamara Schwertel, Olaf Tietje,  
Sarah B. Evans-Jordan & Birte Kimmerle*

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**Abstract:** In this article, we introduce our special issue on the topic of "Social Worlds, Arenas, and Situational Analyses." We start by giving short introductions of situational analysis and of social worlds/arenas theory. By addressing both the commonalities between the individual articles as well as their distinctive features in terms of four thematic areas, we demonstrate the potential of situational analysis and of social worlds/arenas theory.

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## 1. On the Relevance of Situational Analysis as a Theory/Methods Package for Qualitative Empirical Research

Adele CLARKE's<sup>1</sup> situational analysis (SA<sup>2</sup>), further developed in cooperation with Carrie FRIESE and Rachel WASHBURN (CLARKE, 2005; CLARKE, FRIESE & WASHBURN, 2015, 2018; CLARKE, WASHBURN & FRIESE, 2022), is making gains—both in terms of attention and of popularity—in the German-speaking scientific landscape as a qualitative empirical research method in the tradition of grounded theory methodology (GTM). Evidence of this can be found in the enthusiasm with which researchers engage in debates about method (e.g., CLARKE & KELLER, 2014; DIAZ-BONE, 2013; GAUDITZ et al., 2023; OFFENBERGER, 2019; TIETJE & TUIDER, 2019) and in the levels of participation in workshops offered as part of the [Berliner Methodentreffen](#) [Berlin Methods Meeting], the [Schweizer Methodenfestival](#) [Swiss Methods Festival], the [Fuldaer Feldarbeitstage](#) [Fulda Fieldwork Days], the [Magdeburger Methodenworkshops](#) [Magdeburg Methods Workshops], the [Tübinger Methodenschools](#) [Tübingen Methods Schools], and similar events. Additionally, the number of publications from empirical studies in which situational analysis

1 Adele CLARKE is the 2023 recipient of the [Lifetime Achievement Award in Qualitative Inquiry](#) from the International Congress of Qualitative Inquiry. We extend our warmest congratulations on this much-deserved honor.

2 The English-language abbreviation for situational analysis, SA, has unfortunate historical connotations in German. Its visual similarity to that of the Nazi paramilitary *Sturmabteilung*, which existed in Germany from 1920-1945, is something we wish to avoid. Therefore, we follow the suggestion of GAUDITZ et al. (2023) and use "SitA" in all German-language texts and "SA" in all English-language texts.

was employed continues to increase (e.g., GAUDITZ, 2022; GLÜCK, 2022; LEGER, 2019; MARR, 2021; MAY & ZEIN, 2018; MAZUR, 2020, 2022; POHLMANN, 2020; REINHARDT, in press; SUHARI, 2019). With this special issue, in which we address theoretical, methodological, and practical aspects of researching empirically with situational analysis, we seek to further these debates and draw attention to current issues and challenges central to these endeavors. [1]

Our two-day workshop, "Social Worlds, Arenas, and Situational Analyses," held digitally in April 2022, laid the groundwork for the current special issue. More than 30 people participated, and most of the authors included in the special issue presented their draft paper for discussion. The spectrum of topics covered exchanges about the use of methods, e.g., using maps as heuristic tools; reflections on the connection between SA, social worlds/arenas theory, and similar theory/methods packages; as well as discussions on researching nonhuman actors. In this setting, we discussed SA and social worlds/arenas theory with regards to theoretical, methodological, and practical strengths and challenges they present. We also issued a Call for Papers independently of the workshop. From a total of 33 received submissions, we selected 15 for systematic, structured assessment: Twenty-two independent colleagues (from Germany and elsewhere in Europe as well as the United States) evaluated the articles in a double-blind peer review.<sup>3</sup> The articles which were recommended for publication were then subjected to multiple rounds of corrections in the guest editorial team and were proofread by a native speaker of the language in which they were published. As editors of this special issue, we also work on and with SA in various disciplines and capacities (BAUMGARTNER, EVANS-JORDAN, LEGER, SCHWERTEL & URBANCZYK, 2023; EVANS-JORDAN & SKOLBEKKEN, 2021; GAEDICKE & SCHWERTEL, 2023; GAUDITZ et al., 2023; KIMMERLE, OFFENBERGER & ZU SAYN-WITTGENSTEIN, 2020; OFFENBERGER, 2019, 2023a; OFFENBERGER & SCHWERTEL, 2022; TIETJE, 2015, 2022, 2023a; TIETJE & TUIDER, 2019). Against this background, and together with the other contributors to this special issue, we share suggestions for solutions to research-practical challenges and aim to further advance the debates on situational analysis. [2]

With its mapping techniques, situational analysis as a research method is a tool which facilitates for scientists the analysis of complex, multidimensional, and intricately interwoven social realities (CLARKE et al., 2018). The prominent integration of mapping approaches in research using situational analysis serves the empirical and analytical examination of collective actors and their negotiations of controversial topics. Central to researching with situational analysis is understanding multiple perspectives relationally and maintaining empirical complexity rather than reducing it (CLARKE & KELLER, 2014). Situational analysis was developed amidst the contemporary challenges with which late modern societies—shaped as they are by global dynamics—are confronted (see also CLARKE, 2018). The multilayeredness of social inquiry is made visible by

<sup>3</sup> Manuscripts deemed by their reviewer(s) as needing a new round of review were revised and resubmitted. Contributions from the editors of the special issue were evaluated by two external reviewers whose names were not made known to the contributor.

regarding the current debates on the global ecological crisis. The questions of whether the world community can influence and halt climate change, of what interests are in play, and what factors must be taken into account, are all closely bound up in the power relationships and the particular economic structural conditions which have developed in the neocolonial period. Here, it becomes evident that the analysis of the conditions and crises of late modernity must necessarily be analyzed and approached from multiple perspectives and on the basis of collective knowledge and operational resources. With SA and social worlds/arenas theory, CLARKE et al. (2022) have created a toolbox suited for the systematic analysis of the role of collectivities in controversial complexes of knowledge and meaning, through which situatedness, perspective, dilemmas of action, and goals, in addition to discourses, narratives, and strategies, take center stage. [3]

Social worlds are groups of various sizes that share some kind of common interest, the furthering of which is accomplished by the employment of organizational strategies. Arenas are constituted by a number of social worlds converging around, debating, and negotiating (at times contentiously) a matter of common concern (CLARKE et al., 2018). As settings for such negotiations, arenas do not exist in and of themselves, but are constructed through action and interaction. Anselm STRAUSS (1978, 1982a, 1982b, 1993) drew on Tamotsu SHIBUTANI's (1955) concept of the reference group in his development of social worlds/arenas theory, locating the latter within the socioecologically and relationally oriented tradition of Chicago School sociology. For CLARKE et al.'s (2022) SA, the theory became an integral component of the theory/methods package of GTM and symbolic interactionism (ibid., see also CLARKE & STAR, 2008). In this constellation, social worlds are "universe[s] of discourse" (MEAD, 1972 [1938], p.518) in which "relationships of orientation, communication, knowledge, expression, and work" (SCHÜTZE, 2016a, p.75, our translation; drawing on STRAUSS, 1993) are built, which focus on the shaping of specific relationships of work and matters of concern. According to this understanding of the concept, particular repositories of knowledge come to exist within social worlds which must be differentiated from general knowledge and which are related to the definition of and work on specific matters of concern. The origin of the theory and its prominent use in social science research on organizations and professions are exemplified herein (OFFENBERGER, 2016). [4]

The action-theoretical and social-theoretical concept of the social world must be differentiated from concepts such as life world, everyday world, and we-community (SCHÜTZE, 2016b, p.89). Fluid and in constant motion, social worlds are established around a common activity. Another explicitly included component of social worlds is nonhumans, which are part of the creation of social worlds and of arenas, e.g., in that nonhuman actors can be involved or employed in the pursuance of the shared commitment. Early in her work, CLARKE (1991) turned to the concept of actants as nonhuman elements, making productive connections with science and technology studies (STS) and with poststructural debates, especially actor-network theory. In her research, actants were part of the action and interaction and were not only present as waypoints and boundaries. This

stood in contrast to the work of Louis WIRTH (1938), who employed geographical (boundary) markers in his conceptualization of social worlds. For him, these were primarily urban living spaces in the sense of a "mosaic of social worlds" (p.15)—the individual mosaic stones in this metaphor being sharply demarcated from each other. Although CLARKE and WIRTH differ in their respective understandings of nonhuman participation, they share a focus on collectivities—in contrast to Benita LUCKMANN's (1970, p.588) concept of "small life-worlds," in which the individual, as unit of analysis, is centered. Conversely, the analysis of social worlds and arenas in SA centers around conflicts which are fought out collectively by members of social worlds in arenas (CLARKE et al., 2018). Even though the concepts of social worlds and of arenas are formulated as nouns, it is processual concepts with which negotiations, controversies, and other forms of collective action can be examined. In this regard, this is a theory whose subject of investigation is unfinished and (to varying degrees) changeable. Employing social worlds/arenas maps, the complexity of situations can be analyzed empirically: "[s]uch maps enable explicit analyses of the social, organizational and institutional dimensions of the situation" (CLARKE et al. 2022, p.14). [5]

The conceptual appeal of social worlds/arenas theory resides not least in its scalability and flexibility when tailoring it to the topic of inquiry. The spectrum of empirical work in which SA's heuristics are employed is correspondingly broad. Maria KONDRATJUK (2017) exemplified this in her study of social worlds in continuing education. Anne CRESS (2021) situated SA and social worlds/arenas theory as a theory/methods package for feminist critical policy analysis. Also addressing social worlds were the authors in the anthology on boundary objects edited by Reinhard HÖRSTER, Stefan KÖNGETER, and Burkhard MÜLLER (2013), in particular with situations pertaining to the boundaries between individual worlds. Other scientists adopted the concept of social worlds as a way to analyze mediatization phenomena (KROTZ, DESPOTOVIC & KRUSE, 2017), aging and care work (MÜNCH, 2021), or the evaluation of education for sustainable development (FRANZ & BRÜSEMEISTER, 2016). Exploiting the flexibility of the theory/methods package, Olaf TIETJE (2018) and Miriam TRZECIAK (2020) pursued the aspect of movement and analyzed social worlds of mobility, making use of SA in research on migration. [6]

The existing studies make evident that SA can be used to examine topics and questions both of broad socio-spatial and historical scope as well as situations of interaction which are much more limited in space and time. The establishment of social rules can be illuminated through the examination of discourses and practices, whereby the pragmatist-interactionist theory tradition proves amenable to combination with poststructuralist and practice-theoretical approaches. It is precisely at this juncture that the current discussions of theory are particularly productive; practice-theoretical inspiration for pragmatist theory building and pragmatist inspiration for practice-theoretical work are in equal demand (DIETZ, NUNGESSER & PETTENKOFER, 2017). With this FQS special issue, we aim to open up a space for debate on social worlds/arenas theory and to gather practical experiences from research with situational analysis. To facilitate mutual awareness of and connections with English-language discussions of these topics,

the majority of the contributions to the special issue were written in English and we have made the editorial available in German and in English. [7]

## 2. On the Contributions

We have divided the special issue into four thematic areas: In the first part, we focus on a discussion of social worlds/arenas theory. In the second part, several authors take up elective affinities between SA and other theoretical concepts. From here, our focus in the third part shifts to the potentials of nonhuman elements. In the fourth part, we reflect on the analytical strategies of situational analysis. [8]

The authors featured in the *first* section scrutinize social worlds/arenas theory as a central theoretical component of SA. Social worlds/arenas theory was taken up quite slowly in the German-speaking world. Discussions of social worlds often took the work of Alfred SCHÜTZ on the "meaningful structure of the social world" (1993 [1932]) as their starting point. Through his engagement with the theorizing work of Max WEBER, SCHÜTZ (ibid.) conceptualized action as a constitutive element of social worlds. As these ideas gained ground, social worlds became equated with life worlds and everyday worlds (e.g., KOTTHOFF & REINDL, 2019 [1990]; PRIES, 2002). Other authors explored the characteristics inherent to the concept of social worlds: Rainer DIAZ-BONE (2010) centered his analyses on culture worlds. He conceptualized these particular worlds on the pattern of Peter A. BERGER's and Stefan HRADIL's (1990) work on life situations. Dariuš ZIFONUN (2013) also anchored his sociology of social worlds in a sociology of knowledge tradition, adopting the perspectives of Hans-Georg SOEFFNER (2004 [1989]). Accordingly, he understood social worlds as spaces of action made stable through routines. Subsequently, however, inspired by Strauss, he widened his gaze to include the concept of arenas and saw social worlds as things which exist in a state of constant change. It is important that the theoretical toolbox of social worlds and arenas be further supplemented and examined. Several of the authors in the special issue address this: Renate BAUMGARTNER (2023) employed social worlds/arenas theory in her analysis of the arena of personalized HIV treatment. Nicoletta EUNICKE, Jana MIKATS and Claudia GLOTZ (2023) put the concept of social worlds to a childhood-theoretical test and questioned whether children can be considered implicated actors, and in relation to which empirical phenomena the concept of social worlds might reach the limits of its productivity. Norbert KLING (2023) emphasized the socioecological aspects of social worlds and arenas by bridging these with urban and spatial planning. Olaf TIETJE (2023b) connected social worlds theory to research on governmentality (e.g., FOUCAULT, 2005). In this, he relied on pragmatism's anti-dualistic impulses and proposed expanding ordered situational mappings to link these with social worlds/arenas analyses. In all the contributions in the first part, it becomes clear that social worlds theory contains suggestions for the conceptualization of collective action in which human intentionality is both centered and decentered, and in which actions become situated within socio-spatial and spatial-temporal relations. [9]

In the *second* part, elective affinities between the conceptual capital of social worlds theory and other theoretical perspectives are plumbed. In doing so, we seek, on the one hand, to identify similarities and differences, and on the other hand, to examine both the consequences for empirical analyses and the fit with the situational analysis approach. On this point, CLARKE et al. have already identified various "new grounds" (2018, p.77) for the conceptual description of the interplay and relationships between elements in research situations. Prominent references for this are especially Gilles DELEUZE's and Félix GUATTARI's (1992 [1980]) *assemblage* theory and Michel CALLON's (2006 [1986]) concept of obligatory points of passage. Key similarities between these approaches and that of social worlds/arenas theory are basic assumptions including anti-dualism, sensibilities to materialism and to power, relationality, and the decentering of humans. Nevertheless, differences remain among the aforementioned approaches regarding the agency ascribed to nonhumans, especially when compared with Bruno LATOUR's (1987) actor-network theory. Taken together, the study of connections between social worlds/arenas theory and other approaches for the conceptualization of collective action and field or arena-related dynamics constitutes a current open question in debates about SA. Links have already been established to BOURDIEU's field analysis (DIAZ-BONE, 2013), knowledge-sociological discourse analysis (KELLER, 2011, 2013), and subjectivation analysis (BOSANČIĆ, 2019). In the current issue, Anke SCHADSPINDLER, Stefanie FRIDRIK and Friederike LANDAU-DONNELLY (2023) contributed to the discussion of elective affinities by elucidating the connection between SA and Chantal MOUFFE's (2005) theory of democracy in order to identify the relationship between the empirical and the normative in SA. Matthias LEGER (2023) tested the extent to which SA can be understood as a type of practice theory and argued for regarding practice theories and SA as a theory/methods package. Sarah LENZ (2023) explored the fit between the American pragmatist social worlds/arenas theory and the French pragmatist sociology of conventions for the study of institutions as they come into being and become established. Her subject for this was the negotiation of the relationship between digitalization and sustainability. Karla WAZINSKI, Anna WANKA, Maya KYLÉN, Björn SLAUG and Steven M. SCHMIDT (2023) tested the potentials and the limits of SA for the study of transitions in the life course, borrowing from process-ontological approaches. The contributions in this part exemplify the conceptual elasticity of SA and its broad suitability for use with compatible repositories of theory. [10]

The authors in the *third* thematic section inquire into the potential of using SA to research the role of nonhuman elements and of materiality. In doing this, they answered the call of CLARKE et al. (2022) to systematically take into account the significance of the role of the nonhuman for the social. In this way, social worlds/arenas theory, which arose out of symbolic interactionist work relations, was, by coming into contact with STS, expanded to embrace aspects including a critique of power and a sensitivity to materialities (CLARKE & MONTINI, 1993; CLARKE & STAR, 2008; FUJIMURA, 1996; STAR, 2010; STAR & GRIESEMER, 1989). CLARKE and MONTINI (1993) examined the abortion drug RU486, which in the beginning of the 1990s was fiercely debated in the United States. They

observed that there were people relevant to social worlds and arenas who were either not present and only represented in the arena through others' discursive constructions of them, or whose perspectives were ignored. In their study, these people were women, who were users of the technology, but who were not included in the negotiations and debates related to it. They conceptualized this phenomenon as "implicated actors" (p.45).<sup>4</sup> CLARKE and Susan Leigh STAR then expanded this concept with that of "implicated nonhuman actors" (2008, p.119). In this way, the social worlds/arenas' process-oriented and fluid conceptualization was supplemented with material and discursive aspects which may not be noticeable on first glance but which nevertheless shape the situation like the proverbial *elephant in the room*. Likewise, STAR (1989, 2010) and STAR and James GRIESEMER (1989) foregrounded the role of nonhuman elements, developing the concept of boundary objects. Boundary objects were for them *traveling* objects, e.g., field notes, animal models, and brain maps, which were used and understood differently in different social worlds. In concert with this concept, social worlds/arenas theory made its entrance not only into STS, but also gained significance for disciplines like human geography, health sciences, computational sciences, and innovation research. In our special issue, Marc BUBECK and Bianca JANSKY (2023) examined the status of materiality for practices in health care for animals and for humans and proposed supplementing relational mapping with techniques for exploring dimensionality. Michi FUJII, Konstantin RINK and Joshua WEBER (2023) used mappings for their respective studies of digital artifacts and expanded their mapping approaches to include the depiction of intersituativity and synthetic situations. Tamara SCHWERTEL (2023) employed the new materialist concept of "becoming-with" (HARAWAY, 2016, p.12) to map the relationalities of heterogenous elements which together constitute the field of deep brain stimulation (see also OFFENBERGER & SCHWERTEL, 2022). By these means, researchers can focus more sharply on how elements come into existence as entities and which practices of boundary making become relevant here. In each of these three contributions, the authors establish the appropriateness of the fit between the subject under study and SA's methodological toolbox, the sensitizing concepts used, and the data analyzed. [11]

The *fourth* area of focus consists of reflections on situational analysis' analytical strategies and research practices. Social scientific research processes and findings are shaped not least by biographical and institution-cultural processes of socialization, through which epistemic communities negotiate ideas about what good methods of analysis are or about how to select appropriate data for situational analysis. In the textbooks, CLARKE et al. (2015, 2018, 2022) invited researchers to practice reflexivity—however, doing so is not without its challenges. In the current issue, Sarah B. EVANS-JORDAN (2023) shared

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4 In the German-speaking world, it sometimes happens that the concept of "implicated actors" (CLARKE & MONTINI, 1993, p.45) is rendered as *implizite Akteur\*innen* [implicit actors] instead of the correct translation, *implizierte Akteur\*innen* [implicated actors]. The nuances between the two forms may (in German) appear small, but they are significant for situational analysis. *Implicated* actors are objects of the actions or agency of other people. Contrary to the term *implicit*, the term *implicated* references *other actors'* condition or quality of having the capacity or power to act; in this way, the term supports the analysis of agency and normative power or the lack thereof (see also usage in CLARKE, 2012 [2005] and CLARKE & KELLER, 2011).

insights into the organization of interpretation work, situated with regard to institutional culture. Using the case of the creation of a new field of work within pediatric nursing, Birte KIMMERLE, Friederike ZU SAYN-WITTGENSTEIN and Ursula OFFENBERGER (2023) examined the potential of using mapping to visualize the creation of arenas and the distribution of discourses (see also KIMMERLE et al., 2020). Ursula OFFENBERGER (2023b) reflected on the situatedness of analytical conventions in national scientific communities. She argued for the consideration of social scientific hermeneutics for the methodological foundations of SA. Finally, Carrie FRIESE (2023) illuminated the methodological implications of digitalization and digital methods for situational analysis. In doing so, she emphasized the persisting significance of embodiment and emotion for all things social, as well as the corresponding consequences for data collection strategies in situational analysis in this digital age. With this fourth thematic section, we extend an invitation to reflect upon and to make explicit the conditions, foundations, and assumptions upon which research work with situational analysis is built. [12]

Taken together, the contributions reflect the breadth of fields and topics in (German-speaking) science in which situational analysis and social worlds/arenas theory have been employed to date. CLARKE et al. (2022) have emphasized the vast possible thematic diversity in using SA as a research method and the broad spectrum of types of data which can be studied with its help. We, the guest editors of this special issue, are hard pressed to conceive of a social question which might not benefit from examination using situational analysis. We are pleased to contribute to continued exchanges on social worlds, arenas, and situational analyses. [13]

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## Authors

*Ursula OFFENBERGER* is a junior professor at the Methods Center of the Faculty of Economics and Social Sciences at the University of Tübingen and heads the Qualitative Methods and Interpretative Social Research Unit. Her research interests include grounded theory methodology and situational analysis, gender studies, and science and technology studies.

Contact:

JProf. Dr. Ursula Offenberger

University of Tübingen, Department of Social Sciences

Methods Center

Haußerstraße 11, 72076 Tübingen, Germany

Tel.: +49 (0)7071-29-77513

E-mail: [ursula.offenberger@uni-tuebingen.de](mailto:ursula.offenberger@uni-tuebingen.de)

URL: <https://uni-tuebingen.de/en/faculties/faculty-of-economics-and-social-sciences/subjects/department-of-social-sciences/methods-center/institute/members/offenberger-ursula-jun-prof/>

*Renate BAUMGARTNER* works as post-doctoral researcher at the Center of Gender and Diversity Research at the University of Tübingen. She conducts research in (feminist) science and technology studies, especially on AI in healthcare and medicine.

Contact:

Dr. Renate Baumgartner

University of Tübingen  
Center of Gender and Diversity Research  
Wilhemstr. 56 (Lothar-Meyer-Bau), 72074  
Tübingen, Germany

E-mail: [renate.baumgartner@uni-tuebingen.de](mailto:renate.baumgartner@uni-tuebingen.de)  
URL: <https://uni-tuebingen.de/en/facilities/central-institutions/center-for-gender-and-diversity-research-zgd/team/renate-baumgartner/#c1509561>

*Tamara SCHWERTEL* is a fellow of the Graduate School "Life Sciences—Life Writing" in Mainz and an associated member of the graduate school "Doing Transition" in Frankfurt/M. She is pursuing a doctorate from a medical sociological perspective on deep brain stimulation. She studied sociology, political science, and philosophy in Frankfurt, Paris and Lyon. Her research interests are qualitative methods of social research, sociology of health and illness, and science, technology, and medicine studies.

Contact:

Tamara Schwertel

Johannes Gutenberg-University Mainz  
Institute of History, Theory, and Ethics of  
Medicine  
Am Pulverturm 13, 55131 Mainz, Germany

E-mail: [t.schwertel@uni-mainz.de](mailto:t.schwertel@uni-mainz.de)

*Olaf TIETJE* is a research associate (post-doc) at the Institute of Sociology at the LMU Munich. In his research, he focuses on labor, gender studies, migration studies, social participation, and qualitative methods.

Contact:

Dr. Olaf Tietje

Ludwig-Maximilians-Universität Munich  
Institute of Sociology  
Konradstrasse 6, 80801 Munich, Germany

E-mail: [olaf.tietje@lmu.de](mailto:olaf.tietje@lmu.de)

*Sarah B. EVANS-JORDAN* is a doctoral fellow at the Department of Public Health and Nursing at the Norwegian University of Science and Technology. In her dissertation work she uses CLARKE's situational analysis to study the origins and evolutions of newborn screening activities at the intersection of medical technological development, social control, and political regulation. Her research and teaching interests include social justice topics in health care and technology development, situational analysis, critical interactionism, philosophy of science, and qualitative social research methods.

Contact:

Sarah B. Evans-Jordan

Norwegian University of Science and  
Technology  
Faculty of Medicine and Health  
Department of Public Health and Nursing  
Postboks 8905, NO-7491 Trondheim  
Norway

E-mail: [sarah.evans-jordan@ntnu.no](mailto:sarah.evans-jordan@ntnu.no)

*Birte KIMMERLE* is a PhD student at the University of Witten/Herdecke, and as a research associate she works in the Department of Nursing Science at the Faculty of Medicine at the University of Tübingen. She researches, writes, and teaches in the fields of nursing science, public health, pediatric nursing, child and family health nursing, early childhood intervention, and professionalization of the nursing profession. In her dissertation, she uses situational analysis to investigate how a professional orientation in nursing is differentiating and a new field of work is developing.

Contact:

Birte Kimmerle

Witten/Herdecke University, Faculty of Health  
Department of Nursing Science  
Alfred-Herrhausen-Straße 50, 58455 Witten,  
Germany

University of Tübingen, Institute of Health  
Sciences  
Department of Nursing Science  
Hoppe-Seyler-Str. 9, 72076 Tübingen,  
Germany

Tel.: +49 (0)7071-29-88805

Fax: +49 (0)7071 29-25321

E-mail: [Birte.Kimmerle@med.uni-tuebingen.de](mailto:Birte.Kimmerle@med.uni-tuebingen.de),

[Birte.Kimmerle@uni-wh.de](mailto:Birte.Kimmerle@uni-wh.de)

URL: <https://www.medizin.uni-tuebingen.de/de/das-klinikum/mitarbeiter/profil/4353>

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