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The meaning of IT-support in a coaching procedure

By

Per Sigurd AGRELL

Ekelöv Infosecurity AB

Per-sigurd.agrell@ekelow.se

Arne ANDERSSON

Malmö University

arne.andersson@mah.se

Summary

Coaching is not always done by defensible methods. Here we present however a method with a defined scientific backing which makes assessments and critical discussions possible. The subject matter to deal with is the combination of person and situation and the aim is to find viable combinations of such. This was initially done for the benefit of unemployed youth who hesitated about their strategy but the scope of applications grew into the management of all kinds of issues and hesitations including conflict resolution, reorganization and action research.

The relations which individuals and groups have to situations are very complex and include many aspects and parts. Our method, the Credograf, is focusing on peoples relations to their own work. It is an instrument used to explore these relations. It focuses on some fundamental aspects and parts of this kind of relation. With Credograf we pay attention to the experiences in unique individual areas - constructed during a conversation between a coach/consultant, or a researcher and parts of ones own work. We also focus on the extension of different parts, and how they relate and make up the whole of the work. Often the concept of both the present work and the expected work in the future are included in the exploration of relations to work.

Value aspects of the relation with different parts of the work are also explored. These aspects concern what parts are enjoyed the most and the least, what parts the person thinks he/she is good at and which part he/she feels a need to learn more about. Moreover, different orientations and approaches to work are explored. In both cases (orientations and approaches), four aspects of these are explored.

In the case of orientations to work, the aspects focused upon represent fundamental differences in general attitudes and orientations to work. The main orientation to own work in those aspects is explored.

The variation in different aspects depends both on the person and the situation, and the work. What is interesting is the fit. An analysis of orientation in relation to the work situation may lead to a change in a persons' orientations as well as in work situations. What is called approach to work concerns a person's preferred ways of doing work.

The specific perspective of this article for the Projectics Conference is epistemological. It tries to show how an interesting variety of management approaches can arise around a piece of relatively simple computer software.

Background

The two authors have entered the domain of complex methodology from different directions. Arne Andersson is the inventor of the Credograf method for coaching which became operational after about ten years of theoretical studies, programming and an extensive

coaching practice. Arne's research is generally about how people think, act and find meaning in their life. . He is leaning on phenomenography¹, and influenced by phenomenology². The standpoint is that phenomena may not be taken as direct copies of reality. Now the Credograf does not try to capture any real affinity of people to certain situations. It captures clients' experiences and understandings together with cognition developments in a coaching process. We may call this a second order perspective of the world. This is not a resigned realistic view. It is a subject matter for the help severely needed by the unemployed people (among others). Arnes work with Credograf is based on a non-dualistic view, which implies the fact that things appear distinct while not being separate, as is the case according to the dualistic view. The stand is clearly phenomenographic.^{3 4}

The concept may be hard to grasp or visualize, since the mind engages constantly in the making of distinctions, where as non-dualism in this sense represents the rejection or transcendence of distinctions. In the present case the client is invited to speak about themselves not only with reference to their work or other situation but rather quite united with it.

Per Sigurd has got a long experience from Swedish defense planning preparing decisions about organization and investments. In 1981 the first article was published about differences between methods and processes⁵, and this perspective was new at that time. Visions were drawn about the method as something pure and simple in contrast to the process as something big and complex.

The same year Peter Checkland published his relatively similar *Systems thinking, Systems Practice*.⁶ In 1989 he wrote with Jonathan Rosenhead: "real world action will be much messier than these pure models".⁷ This was five years before Peter Senge wrote about "the fifth discipline", the systems thinking, in which never ending learning uses a variety of mental models on its path by ever new ways of looking at the world.⁸ This kind of a complex view of methods continued strongly by the development of computer science and information technology (IT).⁹ It became normal to see methods and processes as systems of "russian dolls"¹⁰, the one including the other in levels, though IT was not seen like this from the start. Simulation models were allowed to stand by themselves as monumental images of reality¹¹ too often without any functional relation to the management of the phenomena studied. Vision outwitted strategy clumsily, that was an impression from that time, from several countries and from both civilian and military administrations, from own work and from what was learned by

¹ Bowden, J.A. & Walsh, E. (Eds.) (2000), *Phenomenography*. Melbourne: RMIT University Press, pp 102-116.

² For example by Husserl, E. (1929), *Méditations cartésiennes*, Vrin, edition 1992.

³ Andersson, A. (2008), *Intercultural Leadership*. Malmö University, Innovation & Development.

⁴ Bowden, J.A. & Walsh, E. (Eds.) *Phenomenography*. Melbourne: RMIT University Press, pp 102-116.

⁵ Agrell, P. S. (1981), *A Wide OR-taxonomy*. Ifors conference: EURO V.

⁶ Checkland, P. (1981), *Systems Thinking, Systems Practice*. Wiley.

⁷ Checkland, P. (1989), *Soft Systems Methodology*. In Rosenhead, J. (ed) *Rational Analysis for a Problematic World*. Wiley.

⁸ Senge, P. (1994), *The Fifth Discipline Fieldbook*. Random House.

⁹ Walsham, G. (1993), *Interpreting Information Systems in Organizations*, p21-22. Wiley.

¹⁰ The metaphore comes from Agrell, P.S. (1997) *Free and Simple Systems Intervention*. Lincoln School of Management, Working paper no 15.

¹¹ This is what Mike Jackson (and others) calls the "hard" way in his taxonomy, Jackson, M. (1992), *Systems Methodology for the Management Sciences*, Chap 4 and p 275. Plenum.

professional societies in Operational Research and in Systems Science. Let us instead of waking up old scandals recall a nice expression of Tibor Vamos. *We need an orchestrating methodology*.¹² This orchestration then requires that the different instruments/tools can be understood and *made sense*¹³ of.

However we still have the debate between hard and soft methods, between quantitative and qualitative, not always realizing that epistemology may not be reduced to such simple labels. So I still find it interesting to study interfaces between methods and processes.

The relational view behind Credograf

We exist and live in relation to the situations we meet in life. We develop through our relations to the situations we approach. The changes occurring in our relations to the situations are called learning¹⁴. Learning is something appearing throughout the whole life. When we talk about relations, it is more obvious to think of social relations. However, according to the relational view we do not only have relations to the social world. We also have relations to the physical world, as well as to our thinking, feeling and senses. We have relations to concepts to such an extent that it is hard to describe. If life should consist of some few, simple, relations we would have had clear difficulties when adjusting to new situations.
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For example:

In the beginning of this century a French social-anthropologist decided to go with his family to visit a simple farmer, who lived far away from civilisation, in a simple cottage. The researcher wanted to find out how this farmer lived his life. He therefore decided to take his wife and daughter with him to visit the man. The farmer experienced the well-meaning visitors as a threat that he killed them. The farmer was put into jail. In court the prosecutor found out that the man's vocabulary consisted of about 60 words.

Obviously people have different purposes with their activities, that are not always related to learning. If the possibilities to learn are delimited, it is, with other words, not sure that we reflect upon the situations we meet in life. Sometimes things just happen, without any reflection. We may just do certain things instinctively. However, most situations in life dictate some kind of learning, yet we are not always aware that we learn¹⁷, learning is often something unconscious. When we learn consciously it is often because we need to learn certain things in order to achieve certain results. This limited learning is the most common, both in daily life and when it is a matter of competence-development. A fully conscious learning means that we not only direct ourselves towards a better result but that we consciously think of how we should do things differently, in order to achieve a better result in the shorter or longer term. The more difficult things are to learn, the more important it is to

¹² Vamos, T. (1991), *Computer Epistemology*. World Scientific.

¹³ The kinds of make sense in management is nicely exposed in Larrasquet, J-M, (1999), *Le Management à l'épreuve du complexe*, Tome 2. Harmattan.

¹⁴ Marton, F. & Booth, S. (2000). About learning. Lund. Studentlitteratur

¹⁵ Uljens, M. (1989). Phenomenography. Research and conceptions. Studentlitteratur. Lund

¹⁶ Svensson, L. (1978). Some notes on a methodological problem in the study of the relationship Between thought and language – Describing the thought content in terms of different conceptions Of the same phenomenon. Reports from the Institute of Education. University of Gothenburg No. 69

¹⁷ Svensson, L. (1978). Some notes on a methodological problem in the study of the relationship Between thought and language – Describing the thought content in terms of different conceptions Of the same phenomenon. Reports from the Institute of Education. University of Gothenburg No. 69

learn consciously, that is, really think of what we learn, question and analyze. Pedagogy is therefore first of all a matter of how we learn in a conscious way.

Through both the spoken and written language we express what we think. Everything we do expresses what we think. The capability of thinking is fundamental to all conscious acts.¹⁸ To think means being able to create, that is, to do something resulting from all the impressions we receive. How we think and what we think is decisive for what we do and how we achieve and also what we learn. When we consciously want to learn something the way in which we think is of great importance, and also that which makes the greatest difference between people. It is rather obvious that what we learn are different things, if that what we are reading about and/or reflecting upon are different things, for instance, a doctor during an operation. He/she may either direct his/her thoughts and actions towards the persons, including the patient, present in the room (that is the social world) or directly via the thoughts and actions towards the physical world surrounding the patient, including the instruments used during the operation (that is the physical world). What is less obvious is that persons reading the same book or reflecting upon the same event, learn very different things¹⁹. The reason that people, who are otherwise in the same situation, learn different things is that:

- Different persons have different knowledge and thus know different things about the situation.
- Different persons approach the same situation in different ways (we tend to direct our thinking differently).

Most interesting is the difference between how we approach situations, which means that we learn things in a better or worse way. Thus, how we react upon what someone is saying or doing is of great importance. Some people concentrate themselves more on what is said or what is written in a book or a paper. This is called surface-learning. Deep-learning, on the other hand, means that we think of the context to which the information is referring. Deep-learning means looking for the whole picture¹³. When focusing on surface-learning we only see the parts, separated from each other. It is obvious that surface-learning results in limitations in knowledge. The most important limitation is that we do not learn what is worth learning – the deeper meaning of the message.

The limitation to superficial aspects and to parts lead to less usefulness compared with a deeper understanding. Since the things we have learnt are not connected to their context, there is no base for understanding the similarities and differences between different contexts and in order to be able to do something of what we have learnt in different contexts¹⁴. Thus, if we will be able to do something with what we have learnt, it is obviously an advantage to have a deeper understanding, that is, that we experience some principle explaining the relations between the things we have learnt which can be used from one situation to another. This principle means a possibility to identify other similar situations and to see the meaning of different things in different contexts. This creates flexibility in the use of knowledge and skills.

A more general knowledge would mean that we not only see the meaning of the principles in some delimited cases which we have learnt about, but are also able to use the knowledge in relation to new cases we meet¹⁵. To learn how to use a certain piece of knowledge is one

¹⁸ Sandberg, J. & Targama, A. (1998). Management and understanding. Lund. Studentlitteratur

¹⁹ Marton, F. & Booth, S. (2000). About learning. Lund. Studentlitteratur

thing, but to develop knowledge is of course a much more demanding issue. This is something often forgotten in developmental learning-situations and there is relatively little training in order to develop knowledge in a wider perspective.

In the introduction of this part of the paper we stressed that we learn through out our whole life-time, and that much of what is learnt is unconscious. Two aspects of our thinking are of particular importance when it is a question of learning consciously:

- What we think of (the subject of our thoughts) and
- How we organise our thoughts (the organization of our thoughts)

We have the capability to think of what we do. We also have the capability to think of how we think. This distinguish us from animals. A dog or a cat cannot think of themselves “from above”. By the way of getting conscious about how we think, that is, really reflect on our own way of thinking and acting, we will be able to

- train ourselves in thinking differently, which gives new knowledge
- transcend our own limitations and break established habits
- more readily adjust our way of thinking to the situation at hand

The best starting-point in order to learn how to learn we thus get by becoming aware of our own thinking and of possible alternative ways. The alternative ways then of course in turn have to be learned. Learned, not taught!

The case of the Credograph methodology

Let us analyze the Credograph methodology by the use of a metaphor, the Russian doll perspective, as an illustration of a possible methodological complexity and also because the Credograph methodology is interesting in itself.²⁰ A relatively simple computer software is perceived and used in different ways and this variety is not only a matter of different application areas but there is also a variation in the way of looking at the software.

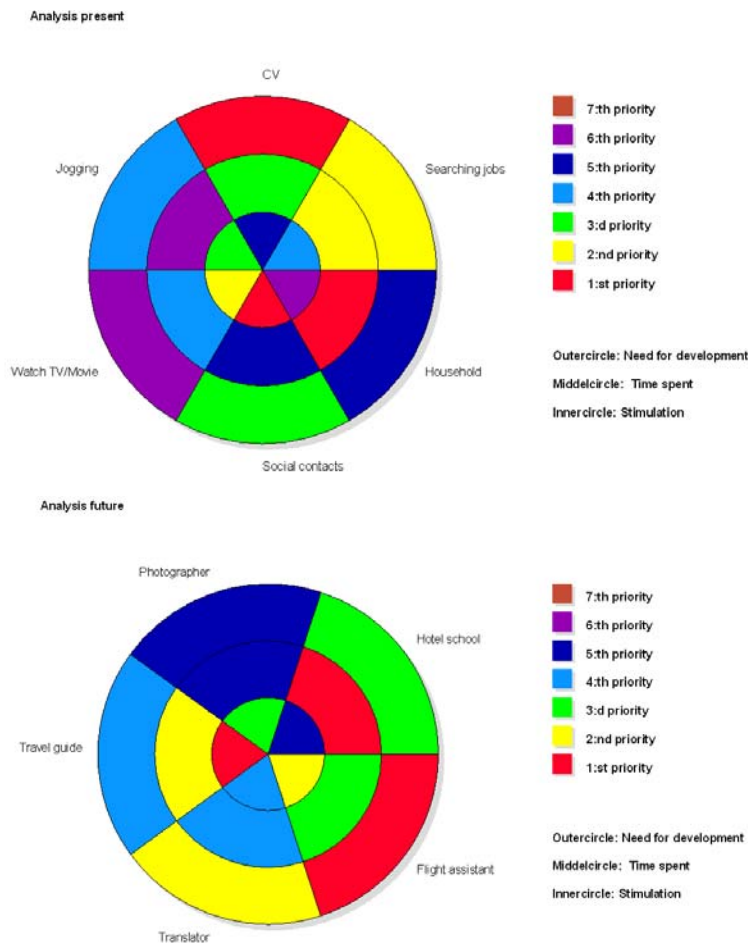
We have a what- and a how perspective for the client as well as for the software. In each coaching case we want to capture not only individual opinions but also, qualitatively, differences in such opinions depending on contingencies, mainly on different imagined situations, roles and occupations.

What happens in an actual Credograf coaching session is that a person; let us call them the client, gets assistance in their efforts to regain a position in professional life. This is within the major part of our applications but we also try other fields of application in situations where a new course of action is to be found. The clients are different and so are their dispositions. The ultimate idea is to help people who hesitate about their decision path and who perform heterogeneously and differently in different situations. More precisely this is to explore and exploit the desires of the client. One of the most promising applications has been with the handicapped. We discover hidden abilities.

The session concretely starts with a socialization-phase, with the use of a series of questions to tune our spirits into creative thinking about the client’s situation, to build a common arena for dialogue about the client’s future and to create a relaxed atmosphere. In a second phase

²⁰Andersson, A. (2008), *Intercultural Leadership*. Malmö University, Innovation & Development.

more precise questions are posed in order to define the time perspective in focus and the relevant options in terms of activity sectors. This is to enable a subsequent deliberation about the client's priorities and to compare those with her actual occupations. These qualities and differences are presented in a colored circular diagram.



This diagram is not an absolute diagnosis in the vein of Jung or Meyer-Briggs: we want to avoid such stereotypes. We try instead to capture a wide enough perspective including a consequential reasoning with the client about her future. We also wish to offer something of a *learn to learn* with our clients, even learn to think phenomenologically²¹, e.g. to try to respect and understand perceptions.

Our method gives as building blocks a series of statements referring to different situations. The result is not truth but responsible statements, even if sometimes very strong and even tiring efforts are exercised to arrive at descriptions, for each imagined situation, of the client's inclinations and stable preferences. The Credograf tool and method produce learning rather

²¹ Husserl, E. (1929), *Méditations cartésiennes*, Vrin, edition 1992.

than teaching and we have learned from Jean-Michel Larrasquet²² to avoid useless efforts towards *les certitudes ontologiques*.

The diagrams irresistibly spark off continued reflections and creative thinking, this time normally focusing attitudes and setting those in contrast to actual behavior and the disposal of time. The exploration is continued into deliberations about experienced and imagined situations where mind and behavior of the client are not tuned in harmony.

It should be noted in this procedure, that the basic logic of this coaching is induction, rather than deduction. We do not deduce from a-priori statements what would be good for the client. In fact, we do not give advice at all. It is up to the client to remember and to imagine the elements which will build up his induced world view. The framing dimensions they are given initially are chosen to balance the need of a kick-off motor with a freedom for their own exploration. Some talent is also needed from the coach to run the process and to make it converge but both the techniques and some of this talent can be taught and learned.

It is interesting to see the difference between the Credograph coaching with the computer support generally offered in France. The latter captures and presents the real and actual options of the labour market. This is not only a different perspective. It is another set of objectives. It is in fact strange that such different approaches are applied to the same problem: which is to find employment/entrepreneurship for a client. The authors' resulting conclusion is that these methods should be combined. Therefore in order to connect to the impressive French system the Credograph coaches should learn about its databases and preset categories in order to translate between those and the clients' own categorizations.

However, a useful creativity may arise from not knowing too much about the realities' restrictions. The aim to dig deep into the mind of the client should not be impeded by imposing restrictions too early in the process.

There is already some routine in exercising the Credograf for a spectrum of purposes, mainly for coaching with unemployed clients and for organizations development. It has been performed about two thousand times, mostly within private enterprises, and rather with big ones than with the SME.

Sense-making

There are multiple perceptions and uses of the Credograf method. Resulting propositions about work, situations and persons depend strongly not only upon legitimate personal opinions and desires on the part of the client but also upon the legitimate interests of the coach. The latter may work for the individual client or for an organization. They may have an academic research interest. They may trust more or less and in different ways the facts presented. They may see responsibilities differently, for herself more or less taking a parent role and for the coached counterpart being more or less realistic, more or less intelligent and in a more or less civic spirit. A knowledge about this variety will be good for the spread and utility of our method and also make a contribution to epistemology. With the Credograf

²² Larrasquet, J-M. (1995), *Le Management à l'épreuve du complexe*. L'Harmattan.

method all involved are able to make their own *make sense* of the IT-support and such initiatives are to be encouraged, with the Credograf-method and more generally.²³

When Ian Mitroff opposes true statements to interesting ones he defines two ways to *make sense*. As an example of the latter he asks “Can science learn to tell good stories”²⁴ and consequently in this article we have the pleasure to answer in the affirmative. By the use of the Credograph-method we can take steps in that direction both as a client and as a coach and of course in co-operation.

Make sense, we find with Werner Ulrich²⁵, is what makes *purposiveness* and *purposefulness* differ, though he does not use this expression. Purposiveness is the effectiveness of tools. Purposefulness is a more ultimate effectiveness with reference to those affected. Otherwise the cognitive material connecting tool and process is not much dealt with in management science.

The perspective of the individual

Let us start with the perspective of the individual client. Sense-making is a matter of perspectives. The method gives a framework which encourages exploration and induction about possible strategies for a client. It strikes a balance between the efficient spark off and the free thinking in the process. There is a sense-making guidance of the coaching session together with the freedom of both parties to discover the client’s stand in relation to different situations and activities.

Among the unemployed and especially among those with a health problem we find in all cases that after a completed session they become aware of and understand themselves in new and richer ways as individuals and as parts of society. We arrive at specifications of possible roles and of possible approaches in different time perspectives. The clients find their way. This may be only in relatively abstract terms, but it is also a real feeling and is not only an imagined “make sense”: it is a real start of something. It is almost the famous executive pronunciation like a marriage or a sentence. It gives mental strength to match the real labor market and its crisis.

The circular diagrams are the core of the method. They are basically a technical perspective in several dimensions. Yet, they are not images of an objective world: they are images of beliefs and desires. They are a kind of best possible images, produced in co-operative dialogue with a certain effort, but they are neither true nor false not even with reference to situations, roles and activities. A diagram is a step towards strategy and decision for which the coach and the client share a responsibility. The picture is not a diagnosis since it is too dependent on which activity sectors are defined but still it should give a stable picture, valid for the time perspectives defined at the start of the coaching dialogue.

The pictures are mainly input to profound deliberations about in what way and how the client should mobilize and act. They can also be taken as inputs to talk about “why”, another kind of

²³ A similar encouragement is expressed in Agrell, P.S. (2007), **Flexible sense-making**, Int. J. Applied Systemic Studies, Vol. 1, No. 2, 2007

²⁴ Mitroff, I. I. (1978) *Methodological approaches to Social Science*, P60-61+93. Josey-Bass.

²⁵ Ulrich, W. (1983), *Critical Heuristics of Social Planning*, p328. Bern: Haupt

“make sense”, but that should be avoided. That drives astray, away from action. It is enough of a challenge for both parties in the coaching to keep in mind all defined dimensions of the arena. The Credograf-method is not Freudian Psychoanalysis.

It is a delicate balance on the part of the coach to decide to what extent she should read the diagrams in a critical vein or pose critical questions. On the one hand this is a simple way to have a kind of conversation, and such questions come so easily, but critics may also block imagination. Better ways to encourage the client to speak can normally be found.

The Coloured diagram is not the final product of the coaching process. The diagram makes an arena for deliberations. Issues and options for the future are created yes, both created and discovered! Coaching may be iterated, connected to data base search etc. There is no necessary end to the process.

For completeness sake we may also mention the risk that coach and client do not agree and not much discovery happens. There can also be different levels of sincerity both from coach and client, but the risk is small. The method seductively pushes towards relevant statements.

Our coaching raises the spirit of the client, thus giving strength for the laborious and time consuming efforts to find a job. We see this regularly, and that is our reason to present this simple method and its sense-making relations.

And let us not forget the initial aim which is to help a client invent and make a choice. We have not yet explored all the fields of application and useful coaching that this opens up. We dare say however that in all cases a session helps to make an itinerary for the client's strategic development. It helps specify elements of this development and as prerequisites, options, possibilities, resources (existing and needed ones) and indeed her basic priorities. It creates freedom by making possibilities explicit. It kicks off a process of establishing some requirements and/or specifications in addition to new ambitions for the self. The client is assisted in expressing a rationale for action.

It is important to note that even after a thorough and complete session no real realism is arrived at. One might say that we may have a real picture of ambitions, opinions and priorities with the interviewee, but not even this is sure. There may be hypocrisy, self deception or Devereux's famous *contre-transfert*.²⁶ Being aware of this risk increases the complexity of the “make sense” but this awareness also increases the value of a coaching session. This increased complexity is not bad: it helps. It may vitalize the coaching dialogue if the coach understands such concepts well enough to use them without at the same time outwitting the clients linguistic abilities.

Organizational perspectives

The perspectives of an individual and of an employer are naturally different. They lead to differing delimitations, differing criteria and to differing ways of posing questions. The group instead of the individual may be the one that answers the questions and who receives his profile as a circular diagram. This is not however a matter of different kinds of making sense.

²⁶ Devereux, G. (1980), *De l'Angoisse à la méthode*. Flammarion.

This does not make the credograf method go into another genre. It will still be a matter of serving a client by providing a profile about different aptness for different situations.

When we interview several persons simultaneously however, in order to reconsider the roles in a group, a flavour of gaming appears between the participants. That is true whatever the reason for such collective action may be. It may be a matter of conflict resolution, reorganization, recruitment or efficiency for example. This coordinated coaching makes a change of genre/make sense while still using the same software. The clients never think the same way in group as when they are alone with the coach.

Consultancy versus action research makes another difference, both for the coach and for the client. Action research may for example be about differences between cultures and then provocative questions may have quite another legitimacy than when the coach is alone with the client. This is subtle, but surely, also in other ways as well, the consultant coach and the researcher will not take the same stand in a Credograf interview situation.

A theoretical discussion

The Credograf-method not only offers mainly freedom but also some nomothetic restriction to the users. The software is built upon the dimensions

- Present versus future
- Sectors of activity
- Need for development versus present involvement versus fundamental interest
- Attitude versus action.

The method as a whole is built upon an effort to focus the client and their situation as an entirety. We consciously avoid seeing a separation. That is not our slicing of the world. Our slicing is to make situations differ, while still being relational.

The method is phenomenography in that the client's perceptions are respected. With their own *intentionality* they should see the *essence* of themselves in different situations that is the essence of the unities we just defined as couplings of person and situation. Whether we see the coach as a phenomenographical observer is less necessary to precise about, what is important is how the client perceives in their observations.

This has been a relevant framework to start a sufficiently free-ranging coaching session in each case. We are aware however of the debate between idiographic and nomothetic currents for description. The former would desire less of a structure: they would see the given dimensions as a burden. That is how coaching is done today normally, and that must be criticized. This ruling practice does not give a sufficient discovery of relevant options and it does not help the documentation of a coaching situation which is demanding in all cases when subsequent iterations are needed.

In a nomothetic paradigm we would have more of an a priori structure: more dimensions, more categories. We would have had deductions and perhaps a final testing. That exists and it may be useful in other cases but it is not the exploration, creation and respectful democratic atmosphere which we find apt for coaching with a troubled unemployed person. In a

credograf session we listen directly and respectfully to the client. The method leans in the direction of accepting the client's world view. They have to take much of that responsibility.

Too much of a structure may also be imposed when successful experience is exchanged or when seeking advice from norms and standards. That will be a risk, but being aware of it will help us remember the fundamental assumption that situations are different not only as a context for our clients but also in the way a coaching is done.

Another reference to existing theory which we want to make is to the science of literature, which defines genres and in this writing explains how, in an *open text*²⁷, a mood of reading adds to a genre of writing to create meaning differently for each and everyone. Both the client and the coach have got their respective freedoms to make sense of the diagrams. Would it be too courageous a way of thinking to imagine that management reciprocally one day could teach literature something about flexible reading?

Conclusion

The small group of people involved with developing and applying the Credograf method understand its flexibility. We do not only apply to different subjects but we do it in different ways. There is a variety of approaches even if the objective is as fixed as that what exists to find a strategy for an unemployed person. A fixed computer programme is embedded in a very flexible process which for this reason may be called a methodology. Still, flexibility is combined with coherence and the reader who so wishes may recall the Russian doll metaphor to see the relation between software and process. The reader need not be surprised by the existence of such a methodological phenomena but it may be amusing to see a real case as portrayed above. It may also be of use for any methodological specialist to learn that differing methods may be mixed in a coherent way and especially that *hard* IT may be included in a *soft* process.²⁸

²⁷ Let us refer to Umberto Eco (1979), who has got a for our purposes general enough semiotic view of literature: *The Role of the Reader*. Hutchinson University Library

²⁸ For a general survey about mixing management methods we advice: Midgley, G. (2000), *Systemic Intervention*, Chapter 10. Kluwer.