15 Mapping Dialogic Pedagogy: Instrumental and Non-instrumental Education

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The concept of dialogue has become increasingly popular in diverse areas of social sciences. In the field of psychology, a dialogic framework has been introduced from studies of emotions (Garvey & Fogel, 2007) to the studies of memory (Fernyhough, 1996). Interest in the concept of dialogue can be found in many classical psychologists who have influenced modern sociocultural psychology: Vygotsky, Piaget, Mead, and so on. There has also been affinity between sociocultural psychology and dialogic framework (Wertsch, 1991). One of the major issues that dialogic approaches have faced in diverse social science fields is to conceptualize dialogue itself (e.g., O'Connor & Michaels, 2007). What is dialogue? What is a good dialogue? In this chapter, I want to discuss diverse approaches to dialogic framework in education as an independent sociocultural practice that sociocultural psychology investigates and consider how the field of dialogic pedagogy tries to address this issue of conceptualizing dialogue. I introduce non-instrumental dialogic pedagogies where dialogue is viewed as the medium, in which and through which meaning making and truth live. This view is contrasted with instrumental approaches to dialogic pedagogy that view dialogue as a tool for more effective education. Although being particular to the field of education, these conceptual and even political tensions in education may affect important debates in sociocultural psychology.

15.1 The Growth of Interest in Dialogic Approaches

An interest in the concept of "dialogic pedagogy" (aka "dialogic teaching," "dialogic education," "dialogic learning") has also been growing in education in the last twenty years. On November 24, 2015, Google Search showed 50,300 combined entries on these terms. Google Ngrm Viewer (https://books.google.com/ngrams) shows that the use of these terms in academic books in English emerged in 1965 and has grown since. Although modern interest in dialogic pedagogy seems to emerge only in the 1960s, it was a very old and probably widespread educational practice. Perhaps, one of the best known examples of dialogic pedagogy in the ancient times is Socrates's dialogic pedagogy practice described by his student Plato (1997). However, dialogic practices and dialogic pedagogy existed in ancient Greece, before, during, and after Socrates's time, although possibly in some other forms than those depicted by Plato (Apatow, 1998). There has been a long tradition of dialogic pedagogy, called *chavruta*, *chavrusa*, or *havruta*, in Jewish Yeshivas, involving dialogic studies of Talmudic texts, that goes back to the eras of the *tannaim* (rabbis of the Mishnaic period, 10–220 CE) (Hezser, 1997). A famous economist, Nobel prize winner, Amartya Sen argues that dialogic pedagogy has been well situated within the Indian religious and civic traditions and spread across

Asia with the rise of Buddhism (Sen, 2005), however, I think that this claim has to be tested and studied systematically. Historic research of dialogic pedagogy practices and ideology in the ancient time is needed.

15.1.1 What Is Dialogic Pedagogy?

So, what is dialogic pedagogy? For the purpose of this chapter of mapping dialogic pedagogy, I define this term as a self-reference – whenever an educator claims that he or she desires or engages in "dialogue" in his/her teaching or learning or education, he or she is involved in "dialogic pedagogy" as opposition to "monologic pedagogy." Of course, what educators may mean by "dialogue," by "pedagogy/education/learning/teaching," and the relationship between these two concepts may vary from educational participant to educational participant. My goal here is to try to map these differences.

I argue that the modern emergence of "dialogic pedagogy" has been rooted in the three main common related trends. The first common trend among probably all dialogic pedagogy approaches is *dissatisfaction with the conventional education*, based on diverse forms of transmission of knowledge. In this conventional form of education, teachers cover/transmit the curricular material, selected by the teachers and/or other authorities, while students remain passive and silent receptacles (Rogoff, Matusov, & White, 1996). Dialogic critique of a conventional institutionalized pedagogy is its disinterest in and insensitivity to students' subjectivity often leading to teachers' insensitive guidance and students' alienation (Matusov & Marjanovic-Shane, 2012). The second trend is educators' *attraction to and interest in the concept of dialogue itself as the foundation of education*. Some dialogic pedagogy educators see the concept of dialogue as one of the main possible remedies (if not *the* remedy) to address the problems of a conventional edu-

cation (although non-dialogic approaches alternative to conventional education are also available). However, for some other dialogic education, the opposition to conventional education is less important. Dialogism triggers students' activity to make learning active, meaningful, and deep. The third common trend involves the nature of *a relationship between "monologic pedagogy" and "dialogic pedagogy."* This relationship can vary from a dichotomy to a juxtaposition in or even mutual complementing of diverse types of dialogic pedagogy. Sometimes, but not always, this trend relates to the first trend of dissatisfaction with a conventional education that is often considered and criticized as being "monologic."

At the same time, ironically, these three common trends in dialogic pedagogy also distinguish and at times polarize the diverse dialogic pedagogy approaches themselves. Although all dialogic pedagogy frameworks may be dissatisfied with a conventional institutional pedagogy, their dissatisfaction differs in degree and quality. They may answer differently to what is wrong with a conventional education and why dialogism is necessary for education. Similarly, although they all are attracted to the notion of dialogue, they may understand this notion differently as I will discuss below. Finally, the monologue–dialogue opposition may have diverse forms in diverse dialogic pedagogy frameworks and can be viewed as a dichotomy, a dialectical contradiction, complementary aspects, or even a stylistic juxtaposition. Thus, these three trends of similarities and differences provide me with lenses on my analysis of the similarities and differences among the existing diverse dialogic pedagogy approaches.

Of course, non-dialogic pedagogies – pedagogies that are not interested in the notion of dialogue – have their own great diversity as well. They involve both conventional transmission of knowledge/skills/attitudes/values approaches and non-dialogic innovative approaches, such as discovery learning, scaffolding, apprenticeship, problem-based learning, and so on. Innovative

non-dialogic pedagogies may also criticize conventional institutionalized education but they do not evoke the concept of dialogue to address its problems. Some non-dialogic pedagogies may involve dialogue but they may not emphasize its pedagogical importance and/or dialogue that may exist on the periphery of the pedagogical and learning efforts. Incidentally, sociocultural educational approaches may or may not involve a dialogic framework either. The non-dialogic pedagogies will remain in the background of my analysis here as they remain "dialogic opponents" for diverse dialogic pedagogy.

15.1.2 Diverse Dialogic Pedagogies: Instrumental and Non-Instrumental Education

My analysis of diverse approaches to dialogic pedagogy has been limited to analyzing diverse *conceptual* dialogic frameworks, focusing on their declarative nature – i.e., the espoused theory of practice – rather than on how educational practitioners enact their espoused dialogic pedagogy in their particular pedagogical practice – i.e., the theory-in-action (Argyris & Schön, 1978). In other words, the "data material" for my analysis were pedagogical texts articulating their particular concepts of dialogic pedagogy – theoretical work, educational manifesto, and even empirical studies that involved conceptualization but not analysis of educational practices directly. The last can be an important and necessary study on its own. Thus, my finding claims can be warranted only for espoused dialogic pedagogy framework.

The main finding of my investigation is that the literature on dialogic pedagogy presents a vast terrain of diverse conceptual families and approaches; and within this vast terrain two big strains of dialogic approaches that I call "instrumental dialogic pedagogies" and "non-instrumental dialogic pedagogies" that vary in how they see the major purpose and function of education (see Figure 15.1).

By "instrumental dialogic pedagogies," I define a family of diverse dialogic pedagogies that treat dialogue as *a tool or a means* for achieving otherwise non-dialogic goals that exist outside of dialogue. These non-dialogic goals usually involve varied curricular endpoints, such as particular philosophical truths (Plato & Bluck, 1961), state defined educational standards (Lefstein & Snell, 2013), or preset social justice and equity values (Freire, 1978; Paley, 1992; Rule, 2015). Dialogue is often viewed as a better or the best (more/most effective) way to achieve these preset curricular endpoints so the students deeper understand, accept, and socialize in them. The biggest issue for instrumental pedagogies – dialogic or not – is how to make students arrive at the preset curricular endpoints in the most effective and deepest way for each student. The instrumental dialogic pedagogies see dialogue as the answer to this question.

By "non-instrumental dialogic pedagogies," I define a family of diverse dialogic pedagogies that views the meaning making process as inherently dialogic (Bakhtin, 1986, 1999; Matusov, 2009a; Sidorkin, 1999; Wegerif, 2007). Meaning making, on which arguably genuine education is based, emerges and lives in dialogue. Outside of dialogue meaning does not exist. From this point of view, dialogue cannot be a tool for achieving non-dialogic goals. It cannot be a tool or a means – period. Also, dialogue as meaning making transcends any particular activity and practice. Dialogue cannot be exited or avoided, but dialogue can be distorted by excessive monologism or by excessive dialogism (Bakhtin, 1999; Matusov, 2009a). Non-instrumental dialogic pedagogy approaches to open dialogic investigations focus on how to promote the power of dialogue, as a meaning-making process, cleaning it from distortions of excessive monologism (and, to a lesser degree, of excessive dialogism). The difference among these non-instrumental approaches is in emphasis. Some non-instrumental dialogic pedagogies
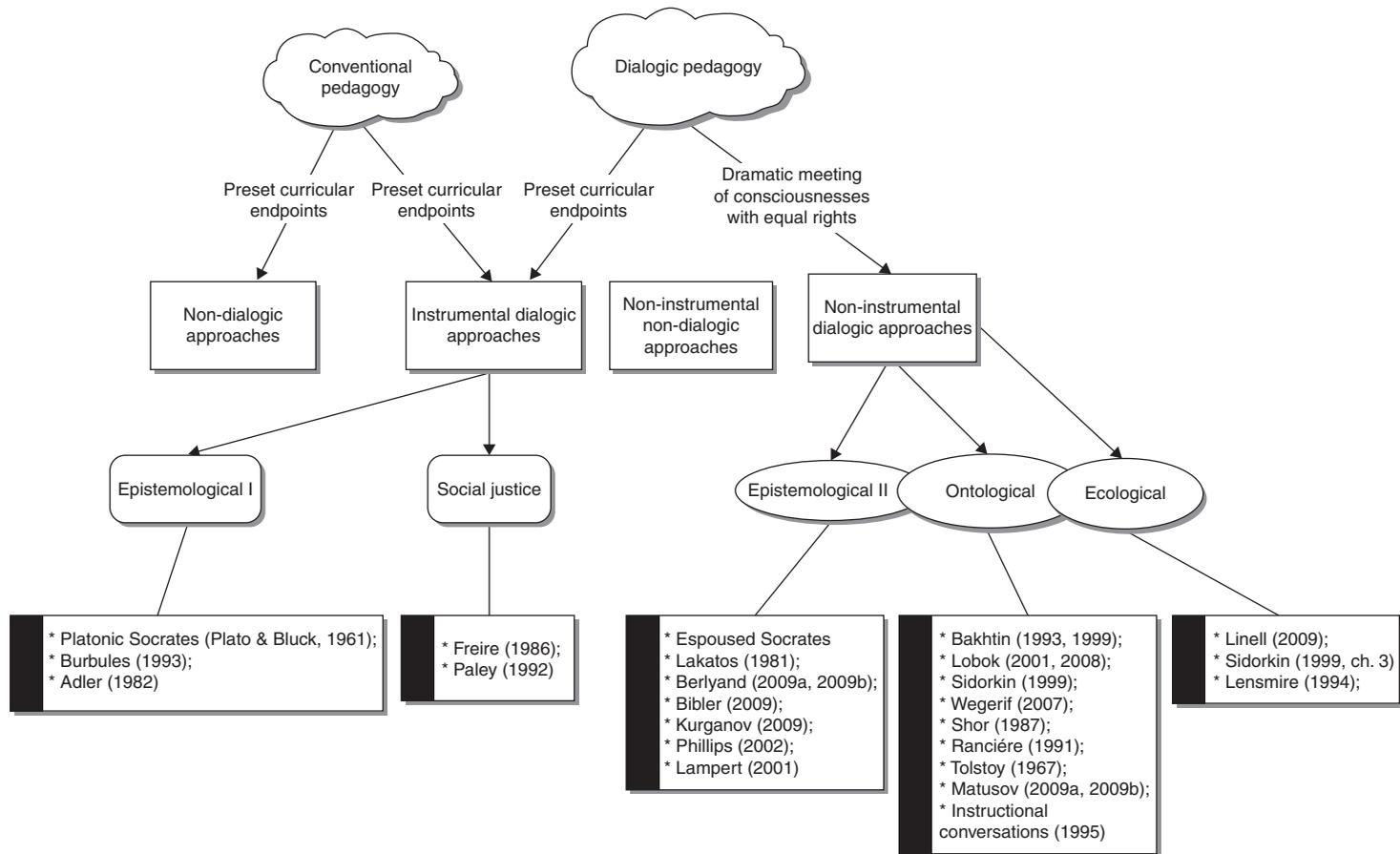
Figure 15.1 Diverse and vast terrain of dialogic pedagogy. Source: author's website at https://diaped.soe.udel.edu/dp-map/?page_id=18.

emphasize dialogic production of knowledge (Lakatos, 1981), some emphasize ontology of the participants (Sidorkin, 1999), and yet some may emphasize ecological well-being of the participants (Linell, 2009).

Previous discussions of my terminology with my dialogic pedagogy colleagues have revealed several possible confusions that I want to clarify from the beginning of the presentation of my findings. By labeling "instrumental" versus "non-instrumental" families of dialogic pedagogy approaches, I want to emphasize that for the first family instrumentality is what defines the role of dialogue in dialogic pedagogy. Of course, instrumentality also plays a role in the non-instrumental dialogic pedagogy family of approaches. Thus, certain instrumentality can promote good dialogue – e.g., instrumental organization of the pedagogical time–space (i.e., "chronotope" Bakhtin, 1991; Matusov, 2009a, 2015a; Renshaw, 2013) of the educational process (i.e., pedagogical design). However, this instrumentality does not define the role of dialogue in these dialogic pedagogies. In contrast, instrumentality does define the role of dialogue in the instrumental dialogic pedagogies.

Thinking deeper about my main 2010 finding of the division of the terrain of dialogic pedagogy approaches on "instrumental" and "non-instrumental," I have come to a conclusion that it probably reflects a bigger divide in the entire field of education (and probably beyond, in social sciences). Instrumental education views education as a servant for other spheres of human activity, necessities, survivals, and needs. Non-instrumental (or intrinsic) education views education as a goal in itself, as a fundamental existential human need, not reducible to other needs (i.e., as "the final cause" in Aristotelian terms) (Matusov et al., 2017). Public debates on education often reveal its instrumental role (Labaree, 1997). Education is often viewed as a means for achieving upward social mobility, leadership in global economic competition, morality,

social cohesion, health, economic reproduction, social justice, citizenship, economic and political equity, patriotism, nationalism, ethnic and racial tolerance, and so on. Educational sociologist David Labaree (1997) conceptualizes these instrumental public goals of education as follows: (1) democratic participation, (2) social efficiency, and (3) social mobility. When I presented Labaree's research to my education research graduate students by coding their own goals of education, we often found the forth common goal that we called "education for education's sake" or "education for growth" or "education as self-actualization." When on request of my graduate students I contacted David Labaree about this fourth goal of education, he replied that he would not count it as "a *public* goal of education." In my view, David is both right and wrong. He is right that "education for education's sake" is an inherently and fundamentally personal need, and thus a fundamental human right, that cannot be imposed or demanded by society, in contrast to the three instrumental goals that he listed. But, I respectfully disagree that society does not have interest in promoting the inherent, non-instrumental, sphere of education rooted in the fundamental private need or that the public does not engage in debates on the non-instrumental education, although it is true that these public debates are more quiet and less recognized.

The fact that the intrinsic, non-instrumental, sphere of education is not publicly well recognized may have deep historical and sociocultural roots. The notion of education expressed by the Greek word "school" means "leisure" and was understood as a leisurely pursuit of critical examination of the self, life, world, and society (Arendt, 1958; Plato, 1984). This type of leisurely pursuit of critical examination, freed from labor and work, became available for free male citizens of a Greek democratic polis and was based on exploitation of slaves and women (Arendt, 1958). Until people again become free from labor and work – free from survival

and necessities – non-instrumental education for self-actualization cannot be mass education. Currently most of economic and institutional practices require people to act as smart machines: to predictably arrive at preset goals and to be mutually replaceable (Mitra, 2013). But it is true that humans can never act as perfect smart machines even when they engage in the most routine work (Wenger, 1998), the so-called "human factor."

It is also true that the instrumentalized modern economic and institutional practices require their own architects and designers – an intellectual elite – who do not act as smart machines but are engaged in the creative imagining of new goals, new values, new practices, new art, new theories, and so on. Besides, the fundamental need of people for self-actualization and personal growth, remaining mostly unrealized for the majority of modern humanity (Maslow, 1943), also pushes for non-instrumental education. These pressures apparently create oases and safe havens of non-instrumental education (e.g., Greenberg, 1992; Neill, 1960) in the vast ocean of instrumental education.

However, we may come increasingly closer to the point when a need for human instrumentality will diminish through robotization, automatization, and telecommunication, when economic and institutional practices may not need mass human employment in general (so-called "technological unemployment") and smart machine-like employment in specific (Ford, 2015; Markoff, 2015; Rifkin, 2014). These growing changes in technology, economy, and institutional practices may create a new demand for mass non-instrumental education. Thus, the tension in the field of dialogic pedagogy may reflect bigger historic sociocultural tectonic tensions in our society, if not in modern civilization.

Finally, I want to warn my readers about my biases. I subscribe to a particular non-instrumental ontological dialogic pedagogy that, like the ancient Greeks, views education as a leisurely pursuit of critical examination of the self, life, world, and society embedded in a critical dialogue (i.e., "internally persuasive discourse"; Bakhtin, 1991). I present the terrain of dialogic pedagogy not from the objective bird's eye view, which I view as impossible and undesirable, but from my own interested – read "biased" – perspective.

15.2 Instrumental Dialogic Pedagogies

The instrumental dialogic pedagogies criticize the conventional institutionalized education for its inefficiency to engage students into deep understanding of the preset curricular academic material. They argue that this is especially true for students from disadvantaged communities, whose learning is mainly based on memorization and drills (Adler, 1982). Freire (1986) criticized conventional pedagogy as "the banking model," in which teachers deposit knowledge and skills in the heads of the students without this knowledge and skills being critically examined by the students.

Dialogue is supposed to address this main problem of conventional education, "Dialogue is an activity directed toward discovery and new understanding, which stands to improve the knowledge, insight, or sensitivity of its participants" (Burbules, 1993, p. 9). There are various way of defining understanding of what dialogue is in the instrumental dialogic pedagogies. In some instrumental pedagogies, dialogue is understood as an interactive genre of guidance, where the teacher–student talk ratio is low (O'Connor & Michaels, 2007). Thus, describing pedagogical dialogue, Burbules (1993) focuses on behavioral interactivity: increasing students' talk, asking open-ended questions, setting interactional turns, avoiding lecturing, and so on – what he calls "dialogue game." In another instrumental dialogic pedagogy, dialogue is understood as "heteroglossia" – juxtaposition of diverse voices of the students (and the teacher), referring to

Bakhtin's (1986) notion (e.g., Lefstein & Snell, 2013). Some other instrumental dialogic educators define dialogue as a Socratic method of questioning students about their own beliefs and knowledge to lead them to the correct knowledge (Adler, 1982). Yet, other instrumental dialogic educators argue for engaging the students in the analysis of dialectical, mutually constituting, contradictions in the studied material (Freire, 1986). I am sure that this list of definitions of instrumental pedagogical dialogue is not complete.

The relationship between dialogue and monologue can also vary in diverse instrumental dialogic pedagogy approaches. It is complementary in writings of Adler and some others (e.g., Lefstein & Snell, 2013). Thus, Adler argued that new material, unfamiliar for the students, has to be known monologically via a lecture and/or demonstration (and drills of new skills) and then the new knowledge and skills, experienced by the students, can be deepened through a Socratic method of (instrumental) pedagogical dialogue of carefully defined leading questions. Elsewhere, I characterized this relationship between dialogue and monologue in the following way,

Dialogic method can be done once a week or one hour a day or not at all – it can be dosed, scheduled, and well located in the classroom.[1] This claim [of instructional dialogue's efficiency – EM] can be tested empirically by comparing students' learning stemming from dialogic and non-dialogic instructions. This prescriptive approach focuses on consideration when dialogic instruction is needed for better learning of new material or for reconceptualization of already known material, for learning factual information or for learning conceptual understanding, for younger students or for older students, for math or social studies, and so on (see for proponents of the weak dialogism in education: Adler, 1982; Burbules, 1993; C. Phillips, 2002; Renshaw, 2004). (Matusov, 2009a, p. 75)

However, the dialogue–monologue is dichotomous in the writings by Freire. For Freire, dialogue is a part of human nature and social relationship rather than a pedagogical method or technique,

first of all we should understand liberating dialogue not as a technique, a mere technique, which we can use to help us get some results. We also cannot, must not, understand dialogue as a kind of tactic we use to make students our friends. This would make dialogue a technique for manipulation instead of illumination.

On the contrary, dialogue must be understood as something taking part in the very historical nature of human beings. It is part of our historical progress in becoming human beings. That is, dialogue is a kind of necessary posture to the extent that humans have become more and more critically communicative beings. Dialogue is a moment where humans meet to reflect on their reality as they make and remake it. (Shor & Freire, 1987, p. 13)

In my view, the difference between Freire's instrumental dialogic pedagogy approach and many other instrumental approaches is that his approach is focused on social justice rooted in the oppression–liberation dichotomy, while others' approaches are focused on epistemology of acquiring and producing knowledge. I will consider this issue further.

Finally, all instrumental dialogic pedagogy approaches are aimed at making students arrive at the preset curricular endpoints at its minimum. Of course, arrival at the preset curricular points have to be personal – via a student's own unique learning trajectory rooted in the student's own biography and subjectivity – and deep. By deep, it means a student has to be able to prove and defend these endpoints through a dialogic argumentation. Also, through pedagogical dialogue, students may come to additional endpoints beyond ones that were preset by the teacher, school, or state (although the legitimacy of the student's emerging endpoints is often established by the authority). At times, instrumental dialogic educators can be critical of state preset curricular

endpoints (i.e., educational standards), when they disagree with them. However, they are usually not opposed to the educational standards and their assessment through testing per se. Often they show effectiveness of instrumental dialogic pedagogy by citing test scores (Brown & Campione, 1994; Burbules, 1993; Lefstein & Snell, 2013). At the same time, instrumental dialogic pedagogy educators often argue that testing is not enough to assess depth of students' understanding and other types of assessments are needed (e.g., portfolios, observations, dialogic assessment). In many (but probably not all) instrumental dialogic pedagogy approaches, educational standards seem to define and ensure the minimum quality of education. Thus, the instrumental dialogic pedagogy can be characterized as *standards/testing plus dialogue*. It is compatible with the progressive pedagogical movement seeking for individualized subjective pathways for achieving curricular endpoints preset by the society. Thus, Dewey (1956) argued for "double psychologizing" the societal preset curriculum by analyzing the historic psychological needs for the society to arrive at this curriculum and by grounding this preset societal curriculum in the psychology of the student. It can be concluded that the instrumental dialogic pedagogy sees dialogue as a means for such double psychologizing, insisted on by progressivist educators.

The nature of the preset curricular endpoints is different for different instrumental dialogic pedagogy approaches. For epistemological instrumental dialogic pedagogy approaches, these preset endpoints are knowledge- and skills-based. For social justice instrumental approaches, these preset endpoints are involved social justice and equity. Thus, Adler's "paideia proposal" endorses the recent Common Core educational standards in the United States,

Paideia supports the shift of emphasis from content to skills – preparing students to learn independently and throughout life. Paideia especially supports the improvement in student assessments, so they

measure students' skills, not just their ability to recall facts. Paideia offers resources aligned with the Common Core, integrating all four language arts skills. We believe the Paideia approach to Socratic Seminar is the best way to teach students the essential, lifelong skills of reading, speaking and listening, and writing. (http://www.paideia.org/about-paideia/common-core-standards/)

Similarly, Freire (1978) was not apologetic to accept and actively promote the preset socialist state curricular goals in Guinea-Bissau and Sao Tome because these preset curricular goals were socially just, from his point of view, regardless how dogmatic, authoritarian, and problematic these preset socialist views on social justice actually were (Matusov, 2009a). Suddenly, Freire's passion for a critical discourse disappeared. Not all alternative ideas are allowed in instrumental dialogic pedagogy with focus on social justice. Certain endpoints, at which students may arrive in a critical dialogue, are not legitimate and have to be silenced by the authority (including a critical meta point that education may not or should not serve social justice at all or not only). Similarly in Paley's instrumental dialogic pedagogy, children could deeply discuss issues of social justice, they had experienced in the classroom, until their impasse to address the injustice. After the impasse was detected, Paley (1992) simply imposed her vision of social justice on the children and powerfully shut down the dialogue (see my analysis, Matusov, 2009a, chs. 7, 8).

Before, considering epistemological and social justice instrumental dialogic pedagogies, I want again to warn the readers that when I make a distinction between these two instrumental approaches I focus on their priorities of the preset curricular endpoints: epistemological versus social justice. Of course, epistemological instrumental approaches may involve issues of social justice but these approaches treat these social justice issues as particular knowledge along with other knowledge. Similarly, social justice instrumental approaches may involve many epistemological issues but these pedagogies treat them

through the prism of social justice issues contributing to people's "liberation" (Shor & Freire, 1987).

15.2.1 Epistemological Instrumental Dialogic Pedagogies (Epistemological I)

The epistemological instrumental dialogic pedagogy is characterized by the use of dialogue between the teacher and the students and among the students to achieve some *intellectual, epistemological* curricular endpoints, preset by the teacher. Dialogue here is a pedagogical method (e.g., Socratic Method) or an instructional strategy along with other pedagogical methods and instructional strategies which can be switched on and off. Thus, both Adler (1982, 1983) and Burbules (1993) argue that presentation of unfamiliar material or new information should be done by the teacher in a straightforward lecturing or in general direct instruction ways, while deepening understanding has to be done in a form of (Socratic) dialogue. Since the students do not have any prior knowledge of unfamiliar material, it does not make sense to dialogue about it, from this instrumental perspective. This approach to dialogue as a method can be traced in Plato's Socrates when Socrates gives an example of giving directions to a certain place to someone as a task of not worthy and not appropriate of dialogic investigation (Plato & Bluck, 1961). Thus, the epistemological instrumental dialogic pedagogy is primary concerned with deepening students' intellectual understanding about something but this deepening has some curricular endpoints like, for example, in case of the *Meno* dialogue, that the virtue is problematic and inherited, or that, in mathematics, by increasing the sides of a square twice, the area of the square will increase four times.

The dialogic method of the epistemological instrumental pedagogy is organized in a series of questions and answers usually initiated by the teacher (but not always) and often goes through four phases.

1 Engaging the students into the teacher-defined material – as the *Meno* dialogue shows, it can be quite a struggle because the students might have their own agendas and/or might not be immediately interested in the teacher-defined issues.
2 Searching for and revealing misconceptions in the students' subjectivity on the teacher-defined issues – this revelation is firstly done for the teacher him or herself as the students often are not aware that they have misconceptions and contradictions in their thinking and perception of the reality. Here is where a genuine dialogue is more permitted and tolerable by the teacher.
3 Leading the students into numbing contradictions about their misconceptions (so-called "torpedo touch") – it is important to develop in the students a sense of paralysis from the revealed contradiction between two strong alternatives rooted in the students' own subjectivity; all ways out suggested by the students should be convincingly blocked by the teacher.
4 Leading the students into the preset curricular endpoint as the only possible and logical solution of the contradiction – the teacher usually blocks any alternatives in themes and in solutions. Here is where usually genuine dialogue is less permitted and tolerant by the teacher.

As in the case of Plato's Socrates, I suspect that the teacher's manipulation of the students' subjectivities often involves self-manipulation of the teacher's own consciousness to truly believe that the preset curricular endpoint is the only one possible and logical. Indeed, it is a mathematical fact that the area of a square is equal the square of its sides. What can be problematic there? But, as I showed with the example of $2 + 2 = 4$, it is never the case – anything and everything is questionable and problematic if there is desire to

look deeper (Matusov, 2009a). As Bakhtin (1986) argued, understanding is always unfinalized and, thus, bottomless.

Elsewhere I argued (Matusov, 2009a, ch. 2), that Plato's Socratic Dialogic method is a bizarre combination of radical pedagogical constructivism, based on dialogic investigation of truth though revealing contradictions in people's thinking, and radical philosophical positivism, based on the preset curricular endpoints reflecting the eternal, universal ideas. Now, I wonder if this combination of radical pedagogical constructivism and radical philosophical positivism is a birthmark of the epistemological instrumental dialogic pedagogy in general. Since Socrates, this position has been reinforced by the rationalism of the Enlightenment (the modernism), according to which reasonable, well-intended people with access to the same information will come to the same conclusion (Rawls, 1993). The modernist rational mind has to subordinate itself to the iron logic of the universal necessity and purify itself from any other irrational and corrupting influences like emotions, values, beliefs, responsibility, traditions, social justice, loyalties, and judgments (Matusov, 2015b). In this approach, consensus and agreement are prioritized – because by achieving a rational consensus among rational people through the free marketplace of ideas becomes a proxy for reaching the truth (Habermas, 1984). When the rational consensus is reached, it sets a curricular endpoint for education. In my view, necessity is only an aspect of discourse and by itself it is shaped by other aspects (e.g., values, emotions) and penetrates them as well (Matusov & Marjanovic-Shane, 2015). People's logic does not need to follow the necessity and does not need to slavishly submit it but also define it. The logic and necessity do not provide "alibi-in-being" using Bakhtin's metaphor (Bakhtin, 1993).

Finally, I want to comment on the inherently elitist nature of the epistemological instrumental dialogic pedagogy. Since the truth and power associated with it is rooted in the dialogic method of investigation, people who profess in the method have to be on the top of the society – this is a rather logical conclusion from the epistemological instrumental dialogic pedagogy. According to Plato's *Republic*, the world has to be ruled by philosophers.

15.2.2 Social Justice Instrumental Dialogic Pedagogies

Sufferings generated by social injustice, unfairness, and oppression are symptoms of social untruth. In my view, uncovering, naming, revealing, analyzing, and addressing this social untruth is a very legitimate goal of dialogue and dialogic pedagogy. Some dialogic pedagogies prioritize social justice (e.g., Ferrer Guardia, 1913; Freire, 1986; McLaren & Lankshear, 1994; Shor, 1987) and try to consider all other human phenomena through the prism of social (in)justice. This by itself does not necessarily make these dialogic pedagogies instrumental (especially, if nonsocial justice approaches are also permitted). However, in my contested analysis, some of them (Freire, 1978, 1986; Paley, 1992) indeed become instrumental (Facundo, 1984; Matusov, 2009a). The basic premise of social justice is that at some point social action, social engineering, promoting the correct social justice is more important and more responsible than a dialogue.

In my analysis, a social justice instrumental dialogic pedagogy goes through three phases.

1 Critical dialogic pedagogy revealing evidence of social injustice, its naming, analysis of its contemporary structure and its historical causes, and ways to undermine and eliminate it. Here is where a genuine dialogue is more permitted and tolerable and even promoted by the teacher.

2 Coup/revolution forcefully imposing the right social conditions on the students by the teacher that must promote social justice in time. Dialogue is not allowed anymore.

3 Regime of social engineering focusing on the enforcement of the right social conditions, collecting proofs of the successes, promoting propaganda. Free and genuine dialogue is actively suppressed through manipulation and violence.

For example, Freire's (1986) famous and influential book describing dialogic principles of his critical pedagogy work with Brazilian peasants seems to fit the first phase of a social justice instrumental pedagogy – critical dialogic pedagogy in which Freire helps his students reveal and analyze instances and conditions of social oppression they experience and through that they learn "to read and write the world." Freire's (1978; Freire & Macedo, 1987) less known and less influential books are about his pedagogical work in Africa in socialist Guinea-Bissau and Sao Tome where social coup/revolution already occurred. Freire saw his educational role in promoting the party efforts in socially engineering social justice in these socialist countries. No genuine dialogue was allowed but totalitarian monologic discourse with "tertium non datum" (Bakhtin, 1999) is imposed on the students. Here is an example of Freire's brainwashing of peasants with the party's dogmatic ideology taken from Freire's own account:

The next theme dealt with in the Second Popular Culture Notebook is:

National Reconstruction: II

We saw, in the previous text, that to produce more on the farms, in the factories, and to work more in the public services is to struggle for national reconstruction. We also saw that, for us, national reconstruction means the creation of a new society, without exploited or exploiters. A society of workers. For this reason, the national reconstruction demands of us:

- *Unity*
- *Discipline*
- *Work*
- *Vigilance*
- *Unity* of all, having the same objective in sight: *the creation of a new society*.
- *Discipline* in action, in work, in study, in daily life. Conscious discipline, without which nothing is done, nothing created. Discipline in unity, without which work is lost.
- *Work*. Work on the farms. Work in the factories. Work in public service. Work in schools.
- *Vigilance*, much vigilance, against the internal and external enemies, who will do anything they can to deter our struggle for the creation of the new society.

This text, as simple as it was, posed the problem of the national reconstruction and played with the words *unity*, *discipline*, *work*, and *vigilance*. Obviously, the theme of the national reconstruction or the reinvention of the society of Sao Tome **is imposed by its present state**. The game played with the words *unity*, *discipline*, *work*, and *vigilance*, which appear in a great number of slogans, was introduced to present them **in a dynamic text preserving or recovering their most profound meaning (threatened by the uncritical character of clichés)**. (Freire & Macedo, 1987, pp. 79–80; italics in original; bold added)

While analyzing the Marxist totalitarian regimes of the twentieth century, Laclau and Mouffe (2001) came to a conclusion that ontological privilege of unquestioned power (i.e., the party dictatorship) in association with the extreme epistemological certainty of the political leadership leads to totalitarianism. It does not help that Freire and Paley provide some critical comments about their own pedagogy (e.g., see bolded text above) because they constitute the phenomenon of "awareness without responsibility," probably, aiming on self-manipulation to co-opt the educators' own consciousness (Matusov, 2009a, chs. 4, 8).

The logic of a social justice instrumental dialogic pedagogy seems to be rather persuasive on

the first glance. Indeed, if we, educators, understand and explore with our students the harmful consequences of social injustice – economic and political oppression, in the case of Freire, and systematic social exclusion of some children by other children, in the case of Paley – is it morally and pedagogically irresponsible for the teacher to continue the status quo? For how long can we dialogue with our students while some of them keep suffering? Isn't it legitimate to stop dialoguing and start to act? Isn't it the legitimate and most important professional responsibility by the teacher to ensure social well-being of the students? Dialogue without action becomes irresponsible blah-blah-blah (verbalism in terms of Freire).

My response to that very powerful and legitimate call for the teacher's responsibility is that: (1) truth does not live in statements produced by dialogue, it does not have internal territory (using Bakhtin's metaphor), but lives only in dialogue of many truths and (2) any action is a part of discourse and it has a discursive aspect, which makes it meaningful. When the teacher stops and suppresses a free dialogue in the classroom, he or she does not stop discourse but rather makes it oppressive. Totalitarianism does not solve previous oppressions but rather transforms and intensifies them by total assault on the participants' freedom, in which imposed systematic social inclusion arguably becomes more oppressive than systematic social exclusion (in the case of Paley) and imposed total equality arguably becomes more oppressive than systematic inequality (in the case of Freire), leading to totalitarianism, concentration camps, and mass murders in their historical extremes of the twentieth century.

In my book (Matusov, 2009a, ch. 8), my colleague Mark Smith and I discussed possibilities for the teachers' dialogic impositions on students, which we called "dialogic objectivizations," and their contrast with social engineering promoted by a social justice instrumental dialogic pedagogy. In the proposed dialogic impositions, the teacher's unilateral actions are viewed as tests of ideas that are evaluated by the entire community. Dialogic impositions can be in space (i.e., in some part of the communal space the participants experience new and in some old social regime) or in time (i.e., in the past there was the old social regime but starting from some time there will be a new social regime defined by the teacher). In contrast to social engineering, the participants through experience of the consequences of this action and democratic decision-making can decide to return to the status quo, to remain in a new regime, or to keep changing it. In our view, the issue with a social justice instrumental dialogic pedagogy leading to totalitarianism is not only in the teacher's unilateralism or imposition themselves but more importantly in the suppression of dialogue.

15.3 Non-Instrumental Dialogic Pedagogies

In contrast to the instrumental approaches to dialogic pedagogy, the non-instrumental approaches to dialogic pedagogy view dialogue not as an effective means or a powerful pathway or a strategy for achieving meaning, truth, knowledge, justice, and so on, but the medium in which meaning, truth, knowledge, justice, and so on, live (Bakhtin, 1986, 1999; Matusov, 2009a; Morson & Emerson, 1990; Sidorkin, 1999). As Bakhtin (1986) pointed out, meaning lives in the relationship between a genuine question seeking for information and a sincere answer aiming at honest addressing this question. Any statement by itself makes sense only because it is embedded in dialogic relationships of the address and the response. This dialogic relationship is often invisible and taken for granted, which creates an illusion in people that statements make sense by themselves rather than being tokens and knots of the dialogic relationships. This illusion often

leads to the conventional, monologic goal of education as promoting preset curricular endpoints – self-contained statements, skills, values, and dispositions – to the students. Thus, educational standards are not only a bad idea for good education, hindering meaning making, but also a misleading and unreal concept. And this is the main critique of a conventional institutionalized education based on preset curricular endpoints. In a genuine dialogue, any truth can be tested and is forever testable (Morson, 2004) and emerging endpoints are always provisional, transcending, and never fully predictable for any participant or observer. Meaning making is never given (preset, finalized, positive) but always emergent, unfolding, unfinalized, and relational, in the eye of the beholder.

What is considered "genuine dialogue" beyond meaning making varies in diverse non-instrumental dialogic pedagogy approaches. Thus, the epistemological II and the ontological non-instrumental dialogic pedagogy approaches define "genuine dialogue" as critical and puzzlement-based, while this is not necessary in the ecological non-instrumental dialogic pedagogy. These two approaches view the overall pedagogical goal as in helping students to develop their own strong voices through making authorial judgments informed by other in a critical dialogue. The epistemological II approach puts its emphasis on intellectual self-growth often rooted in the intellectual achievements of the high culture[2] (e.g., "dialogue of high cultures" – elitism), which would define "genuine dialogue." In contrast, the ontological approaches prioritize people's being-in-the-world (Packer & Goicoechea, 2000) in defining "genuine dialogue." Finally, the ecological approaches are more interested in the ecology of human beings free of pedagogical coercion. In contrast to the epistemological II approaches, the ontological and the ecological dialogic pedagogy are concerned with both the mundane low and

high cultures (Matusov, 2009b) in their defining the concept "genuine dialogue."

Since meaning making has the inherently dialogic nature, according to the non-instrumental dialogic pedagogy approaches, dialogue is ubiquitous and omnipresent. There is nothing but dialogue. Dialogue is inescapable. Anything meaningful is dialogic. Monologue as a negative and even ethically evil force is still a form of this ubiquitous dialogue – a distorted dialogue. For example, Hegel (Hegel & Baillie, 1967) convincingly showed in his analysis of slave–owner's dream for "the ideal slave" that beneath such inhumane, oppressive, and abusive relationship of slavery, there is a human desire for genuinely human care and dialogism, however, the slavery relationship distorts this dialogism. Thus, excessive monologism of dogmatism, silencing, or radical relativism (Bakhtin, 1999) is a fallen angel of the genuine dialogism (Matusov, 2009a). The "genuine dialogue" is dialogue, constantly experienced by all of us, cleaned from the distortions of excessive monologism (and excessive dialogism). A part of this distortion is caused by scarcity of and competition for resources and by the fact that the majority of people still need to spend a huge part of their time on providing for their living rather than on self-actualization, envisioning good life, and self-growth. From this point of view, any pedagogy is dialogic, although the dialogism of any pedagogy can be very distorted by excessive monologism. Here, the dialogue and monologue are not genres of the teacher's instruction (e.g., instructional conversation vs. lecture), but degree and nature of distortion of the genuine dialogue as free, open-ended, interested, honest, and (critical) meaning-making never-ending discourse. At the same, dialogue–monologue relationship can legitimately take a form of a dichotomy[3] when dialogue and monologue become opposing, antagonistic, paradigmatically different pedagogical and human values, mobilizing people for different

conflicting actions, relationships, ideologies, and practices.

15.3.1 Epistemological Non-Instrumental Dialogic Pedagogies (Epistemological II)

The epistemological non-instrumental dialogic pedagogy prioritizes the sublime intellectual critical achievement. It focuses on "the eternal intellectual damn final questions" raised by diverse high cultures. It is interested in the mundane only because it can give it the material and opportunity to move to the sublime inquiries (e.g., "what is moderation," see Phillips, 2002, as a good example). The non-instrumental "epistemological dialogue" (the term has been introduced by Sidorkin, 1999) is a purified dialogue to abstract a single main theme, a development of a main concept, and unfolding the logic. Due to this purification, epistemological dialogue occurs in de-ontologized space and time. As a tool of investigation of an ontological dialogue, this purification can be legitimate. However, modeling classroom discussion after an epistemological dialogue can lead to pedagogical coercion as a way of "disciplining the students' minds" so they remain staying on the theme defined by the teacher as the most important. It brackets the complexity and interconnection of the diverse themes and makes certain "irrelevant" agendas, interests, strengths, desires, and ontological groundings as inappropriate and illegitimate (which, in its own turn, requires policing the discourse and punitive actions for violators of the epistemological regime).

In my view, one of the good representatives of the epistemological non-instrumental dialogic pedagogy is Lakatos (1981) focusing on the pedagogical development of math ideas via non-instrumental epistemological dialogue. Lakatos starts his book with a very keen and thoughtful observation on his own endeavor. He ended

his introduction to the book with the following words, "The dialogue form [in his book] should reflect the dialectic of the story [i.e., history of the discoveries and developments of math ideas]; it is meant to contain a sort of *rationally reconstructed or 'distilled' history*" (Lakatos, 1981, p. 5, emphasis in original).

I want to focus on this nature of "distillation" or purification that Lakatos mentioned. Lakatos was talking about distillation, reconstruction, and purification of the history of the math practice, while I am interested in his distillation, reconstruction, and purification of ontological dialogue. History represents an ontological dialogue that occurred in certain physical time and space. But ontological dialogues can also be ahistorical and even imaginary (Dostoevsky's novels is an example, see Bakhtin, 1999).

What are the differences between epistemological and ontological non-instrumental dialogues? Let me start with making observational notes about their similarities. First, like epistemological dialogue, ontological dialogue can also involve abstractions from and reconstructions of live conversations (and it can be entirely fictional). So, it is not focused on "exactness" that produces the difference, although it is true that ontological dialogue has more of what can be called "life details." Second, ontological dialogue can also focus on epistemological issues. Thus, it is not that thematic focus makes the difference. Third, epistemological dialogues usually (or maybe even always) preserve particular voices and generate person-ideas, although in an epistemological dialogue, the person is subordinated and deduced from the idea. Hence, the strong presence and depiction of particular rich voices does not distinguish ontological and epistemological dialogues. Fourth, both types of dialogues can both promote (as well as deviate from) the regime of "internally persuasive discourse" (IPD) described by Bakhtin (1991) as open-ended honest search for truth by all the participants (but not as a sense

of "appropriation" of the teacher's voice by the voices of the students, see instrumental dialogue) (Matusov & von Duyke, 2010). Fifth, they both can be carnivalistic with throning and dethroning the authority (Bakhtin, 1984; Sullivan, Smith, & Matusov, 2009). Sixth, both types of dialogue can involve dramas of ideas and people, although in an epistemological dialogue, drama of the ideas defines a life drama of the participants.

I argue that the distillation, reconstruction, and purification nature of epistemological dialogue is about creation of the comprehensive, totalized, focus of all the participants of the dialogue on some unfolding theme (what is probably called by Berlyand, 2009a; Bibler, 2009, as "a dialogic notion"; Kurganov, 2009). In contrast to ontological dialogue, epistemological dialogue is essentially mono-topic and comprehensive. Epistemological dialogues are self-contained. Let me provide ethnographic evidence for my conclusion. I will group my evidence around themes that are present in ontological dialogue and absent in epistemological dialogue.

From ontological dialogic position, intellectual positions cannot be separated from people's ontology – i.e., how one lives his/her life (see a detailed discussion of this concept below). Who is speaking can be no less important than what is spoken. The person's ontology changes the meaning of the statements. Thus, Bakhtin defined the notion of "voice" as one that "includes a person's worldview and fate. A person enters into dialogue as an integral voice. He participates in it not only with his thoughts, but with his fate and with his entire individuality" (Bakhtin, 1999, p. 293). The person's fate cannot be reduced to one dialogue, to person's position in a dialogue, to the theme, to the logic, or to the sublime. Although, people can never be reduced to their mundane life circumstances, in which the people are thrown and find themselves, the deeds that the people made in these mundane circumstances penetrate and color the sublime dialogue, which is the primary interest of the proponents

of the non-instrumental epistemological dialogic pedagogy. For example, the mundane fact that a father of the American Revolution, Thomas Jefferson, was a slave-owner to the end of his life (he had 187 slaves), who fathered black children, who became slaves (he freed all of them before or after his death), from a slave concubine Sally Hemings (Sloan, 1998), colored (or smeared) his sublime position on freedom and equality to the point that has allowed some scholars legitimately claiming that Jefferson was not only a father of modern democracy but *also* a father of modern racism as the practice of the slavery, which Jefferson was a part, and his claim that "all men are created equal" written in the Declaration of Independence required a justified exclusion of slaves from the notion of "men" – i.e., the ideology of racism (D'Souza, 1995). Jefferson's voice and fate in a dialogue on freedom has been an uneasy intertwinement of the sublime freedom loving philosopher and politician and the mundane slave owner, enslaving his own children and lover.

Let me now turn to differences between non-instrumental epistemological and ontological dialogues. First, epistemological dialogue does not involve an ontological meeting of the participants: their emergent sociocultural, historical, and political relations among each other and with and in the world (see Bakhtin's notion of "encounter"). Lakatos' dialogue starts his epistemological dialogue with the following disclaimer:

The dialogue takes place in an imaginary classroom. The class gets interested in a *PROBLEM*: is there a relation between the number of vertices V, the number of edges E and the number of faces F of polyhedra – particularly of *regular polyhedra* – analogous to the trivial relation between the number of vertices and edges of *polygons*, namely, that there are as many edges as vertices: $V = E$? This latter relation enables us to classify polygons according to the number of edges (or vertices): triangles, quadrangles, pentagons, etc.

An analogous relation would help to classify *polyhedral*. (Lakatos, 1981, p. 6, emphases in original)

What is interesting here for me is how this imaginary "class gets interested in a PROBLEM" is taken outside of the brackets of Lakatos' dialogue. We do not know how and why this interest was developed and negotiated. We do not know how this interest is grounded in the participants' lives. It is unclear of why the participants care about the problem and what makes them care. What if some of the participants had not cared about this math problem in particular or math in general – how did Lakatos made them interested or, at least, cooperate with his dialogue? Was pedagogical coercion and pedagogical violence involved in that process and if so, how? What (and how) created conditions for this classroom? Could the participants have freedom to leave it at any moment (like participants of Socrates' dialogues, for example)?

From a pedagogical point of view, an assumption or an expectation that all participants are automatically and non-problematically interested in a problem can lead to big pedagogical disasters and eventually to oppressive pedagogical violence. Yes, it is true that a common interest in a particular problem can emerge in the classroom but I argue that it usually requires a lot of work from the teacher and/or it is relatively short lived and ecologically (i.e., emotionally, intellectually, physiologically, motivationally, and relationally) unsustainable.

Second, there is no ontological diversity – i.e., diversity in the ways the participants live their lives – nor it is clear how the participants' interests and agendas intertwine in epistemological dialogue. In Lakatos's dialogue all the participants are totally committed to the problem set by the teacher. In contrast, in an ontological dialogue, the participants are involved in a problem space (not one problem) that often has the shared and collective ownership and the diverse agendas. This problem space is often shaped by diverse, multiple, often fuzzy, simultaneous and dynamic ontological concerns by the participants. For example, in the ontological dialogue example (see below), the participants had multiple ontological concerns about fairness, grades, past interpersonal alliances and conflicts, making and maintaining friendships, explanation of percentages, academic motivation, and so on. All of these mundane concerns – the mundane noise – seem to be annoying for an educator working in the non-instrumental epistemological dialogic pedagogy who wants to bracket and suppress them from the public space of the dialogue.

Third, there are no ontological concerns in participants about their reputation that emerges in and transcends the epistemological dialogue. Dialogue can change people's relationships, professional and institutional stands, careers, fates – it can open and close institutional, relational, and societal opportunities that might have little to do with the theme of the sublime dialogue at hand. All that is often bracketed in epistemological dialogues, probably, are spoilers of the purity of the arguments. Nothing outside of epistemological dialogue, outside of its world of ideas – "pulp" of the life – is a concern.

Participants of an epistemological dialogue are often involved in drama, but it is a drama of ideas. In Lakatos's dialogue, student Alpha leaves the dialogue, slapping the door in disgust, so to speak. However, his dramatic actions can be deduced from the unfolding logic of colliding ideas in the dialogue. People, their personalities, their actions, their relations are reduced to their ideas (see Bakhtin, 1999, on the notion of "person-idea"). They are puppets of the self-contained logical development. For example, some proponents of epistemological dialogue view suicide by famous German quantum physicist Paul Ehrenfest in 1933, as a logical development of his position in a debate with Einstein and Bohr (Kurganov, personal communication, July 2008) rather than as a possible tragic result

of his struggle with chronic depression (Klein, 1985) (or a combination of both). In an epistemological dialogue, the participants' ontology originates and is produced by the development of ideas rather than in their lived experiences.

Fourth, there is no ontological urgency in an epistemological dialogue. The chronotope of epistemological dialogue is the world of ideas. Here-and-now ontological urgency of life is not known epistemological dialogue. Arguments can be postponed for 300 years or even more. Epistemological dialogue can occur whenever and wherever. Historical time is bracketed, physical and embedded semiotic space is bracketed. Historical time with its ontological urgency is random, shallow, and unimportant (Lakatos placed his historical comments into footnotes, probably in order not to interrupt the flow of his epistemological dialogue).

Fifth, epistemological dialogue does not know interest in the ontological ecology of the participants (e.g., what is going on with their bodies and feelings at the moment) – only in the universal logical necessity (which can be multiple, according to Bibler, another proponent of the non-instrumental epistemological dialogic pedagogy; see the Russian founder of the school of dialogue of culture pedagogical movement Berlyand, 2009b; Bibler, 2009). In contrast to the spirituality of the sublime, emphasized by the non-instrumental epistemological dialogue, the ontological ecology – the corporality of the mundane – is essentially non-dialogic but it can be pulled in a sphere of ontological dialogicity. For example, with aging, I have noticed that I become crankier, more irritable, impulsive, and even depressed in late evenings. Although, at the time of these evenings, I'm feeling that I have a reason to be like that – something or somebody bothers me and gets on my nerves – I have learned to know that it is probably a result of some biochemical imbalance in my body. In the morning, I'm fine: full of enthusiasm, optimism, patience, and sensitivity. I try to dialogize my non-dialogic ecology by my attempts to use

(not always successful) the famous Russian saying, "The morning is wiser than the evening" and not to make important relational decisions in the evening. Epistemological dialogue does not know ecological concerns, rather it mandates its regime of mono-topic total commitment and purity of the spiritual sublime.

Sixth, despite all assurance to the contrary (e.g., Phillips, 2002), the overall contempt for the mundane that the non-instrumental epistemological dialogic pedagogy expresses generates a kind of elitism with all its moral, ethical, and political consequences. If the "unexamined life is not worth living" (Socrates–Plato), the worth of life and, ultimately the person living this life, is defined by the degree of how much a person can be a dialogic epistemological philosopher, examining his or her own life and lives of others (Kukathas, 2003). The intellectual discourse on life – it is discursive examination – becomes more important than the life itself (examined or unexamined). Using Aristotle's (2000) terms, the episteme overrules the phronesis (and the *techné* and the *sophia*). The epistemological dialogue is focused not just on *any* dialogue but rather on dialogue of *the high cultures*. Thus, Bibler's idea for school as "The School of the Dialogue of Cultures" can be characterized as "The School of the Dialogue of High Cultures" (see my debate on this issue with Irina Berlyand in Matusov, 2009b). Mundane chat or mundane activities might have different and sometimes more important wisdom than philosophical discussion of the sublime.

I think that epistemological dialogue can inform, inspire, and provoke an ontological dialogue. Ontological dialogue can be legitimately studied by reducing it to an epistemological dialogue (e.g., for tracking the logic of some particular theme unfolding in a dialogue). But epistemological dialogue should not guide ontological dialogue, especially in education, because in my view, the pedagogical regime of epistemological dialogue with its insistence on the "discipline of the mind" based on the total commitment

on the mono-topic development of an idea and bracketing the ontology of the participants can be supported only by pedagogical violence. People cannot simply commit totally all the time to the development of one theme, by themselves without an external coercive, if not violent, push on them.

15.3.2 Ontological Non-Instrumental Dialogic Pedagogies

As far as I know the term "ontological dialogue" was coined by educational philosopher Alexander Sidorkin (1999) in opposition to other understandings of the notion of dialogue such as "instrumental dialogue," "epistemological dialogue," "communicational dialogue," "linguistic dialogue," and so on. Sidorkin argues,

Notion of dialogue is treated [in an ontological understanding of dialogue] as central for defining human existence, not merely a form of communication. To experience what it means to be human, one needs to engage in dialogical relations. We are human in the fullest sense when we engage in dialogue. This ontological understanding of dialogue has its implications for education. I argue that schools should focus on helping children experience and learn what it means to be human. Therefore, the entire social arrangement called "school" should be designed around this purpose of introducing children to the life of dialogue. (Sidorkin, 1999, p. 4)

The word "ontological" does not refer to just any kind of particular being, neither does it deal with the existence of dialogue; it refers specifically to *human existence*. This may not be the most conventional use of the term, but from my point of view, it is the most accurate one. The ontological concept of dialogue explores the place of dialogue in *the human way of being-in-the-world*. One of the reasons for using the adjective ontological is a need to distinguish between what I propose and a number of non-ontological concepts of dialogue. The very existence of a human

being in his or her human quality is a result of dialogue. In the non-ontological conception of dialogue, this relation between dialogue and human existence is reversed: dialogue is treated as secondary to human existence, mainly as a form of communication (Sidorkin, 1999, p. 7).

Let me provide my understandings and inferences from Sidorkin's deep and dense definition:

1 I understand the polysemic notion of ontology, "human being," "human existence," as our big and small deeds and relations with others that define us in the world that we create, find ourselves, and are thrown in (Packer & Goicoechea, 2000). Ontology has priority over epistemology – i.e., what and how we know about the world. Ontology is charged with ethic, moral, judgment, politics, aesthetics, desire, will, emotions, responsibility, and so on. Epistemology is embraced by ontology, "How we breathe is how we write" (Soviet poet Bulat Okudzhava's lyrics) but not the other way around, despite the fact that ontology is often the object of investigation by epistemology.

2 Ontological dialogue penetrates all aspects of the human existence. "Buber and Bakhtin, like Copernicus, discovered the new center of the human universe, the dialogical. It is the center in a sense that the very fact of human existence is contingent on engagement in dialogical relations. An individual may exist as an organism in a physical or a biological sense. But we are truly human only when we are in a dialogical relation with another. The most important things in human lives happen between human beings, rather than within or without them" (Sidorkin, 1999, p. 11). Ontological dialogue penetrates both minute, routine, mundane, as well as big in time and the sublime. It does not have the beginning and the end. It penetrates even evil deeds, like slavery. Any teaching even, super conventional and monologic, is penetrated by ontological dialogue.

Oppressive regimes generate distorted onto-logical dialogue.

3 The concept of ontological provides two major frameworks: descriptive (i.e., how things are, see no. 2 above) and prescriptive, normative (i.e., how things should be).

Where is ontological dialogue? I do not try to mystify ontological dialogue but it is different than traditional methodology of "operationaliza-tion." Ontological dialogue is not in the text but always in dialogic, questioning and answer-ing – addressing and responding – relationships between the beholder and other people. Let me provide an example to provoke and engage you, my reader, in what I mean.

In the mid-1980s, I, in my twenties lived in a big Moscow apartment with my wife, my very young son, my grandmother Tanya, in her mid-80s, and her older sister, my grandaunt Klara, who was almost 90 at that time. Klara used to be a technical editor but also she worked infor-mally (and illegally, according to the Soviet laws of the time) all her life as a tailor almost until her death making and adjusting dresses for our big extended family. Once at a dinner when we all met at a circle table, Klara asked us why her niece Rosa, who was in her late 60s then, had not come recently. Rosa often visited her aunts run-ning errands for them and provided them with company. I try to reconstruct our conversation that my wife and I had with Klara – I combine us as "we" because neither I nor she can remem-ber our exact utterances and who made them. I do not remember Tanya verbally participating in the conversation but she smiled showing sympa-thy with my wife and me.

KLARA: I wonder why Rosa has stopped showing up at our place.

WE: We aren't surprised at all! You called her "cow" last time. She was upset. We think she probably still feels being offended by you.

KLARA: Why would she become offended with me? She brought a new dress and asked my

opinion. I told her my honest opinion that in this dress she looked like a cow. You know that I like to tell "mama-truth" ["pravda-matka" in Russian] in people's face. It's not my fault that she looked like a cow in this dress.

WE: You hurt her feelings. You didn't need to lie to Rosa but you could deliver your truth to Rosa in a more soothing and nice way. For example, you could have said something like, "It seems to me that this dress makes you look a bit chubby, no?"

KLARA: That would have been a lie. I did not "seem" but I saw with my own eyes that she looked like a cow in it. Not "a bit" and not "chubby," but as a cow! Somebody must tell that to her.

WE: Klara, she wanted to hear a word of encouragement from you, not your offending "mama-truth."

KLARA: Truth can't be offending. "Don't blame the mirror, if your face is ugly!" If Rosa had wanted to hear a complement, she should have gone to men-suitors – not to me.

WE: But admit, Klara, you don't like truth about yourself when it's unpleasant.

KLARA: I always love the truth whatever it is. I always like when people tell me the truth even when it is bitter.

WE: Do you? What about when people say that you are rude and insensitive? [we gave her a specific example when Klara did not like some truth about her said by a relative]

KLARA: I don't like it because that simply isn't true.

So, is it an example of ontological dialogue? Not, by itself, until it starts puzzling and interest you. It puzzles and interests me. I wonder if Klara's logic is based on some kind of logical fallacy that grants her the right to tell unpleasant "mama-truth" to others, while rejecting this right when she is on the receiving end of "mama-truth". Or her logic is OK – it is consistent and correct, but logic, itself, is not omnipotent in humans' affairs. I wonder if Klara would agree that truth can-not be rude and insensitive, that rudeness based on meanness, while insensitivity is based on the

wrong perception. With Rosa, as with many other people, Klara was not mean-spirited but rather sincere and useful to Rosa (remember Gricean maxims of good communication: be truthful, be informative, be relevant, and be clear?) (Grice, 1975).

Arguably, Klara fulfilled all of these maxims in communication with Rosa, but we argued that it was not enough. Of course, Klara's observational judgment that Rosa looked like a cow in the new dress could have been wrong, but we did not challenge Klara's professional fashion judgment – we agreed with Klara that the new dress did not suit Rosa well. My wife and I were concerned not with the truth of whether or not the new dress really suited Rosa (not with whether or not grandma's soup is salty, using another example), but with something else altogether that may (or may not) be equally or even more important than concerns about truth. Besides truth, one can be concerned about psychological well-being of another person, as it is in the case of Klara, or about being appreciative of another labor as in a case of grandma's over-salted soup. Of course, the concern about truth can overweight these non-truth concerns. At least, this something else has to be taken into account when a person provides a response. However, it is interesting for me in this example that my wife and I chose Klara's own way of delivering "mama-truth" to communicate to her about the limitations of this way of relating with people. We were telling Klara our bitter "mama-truth" in her face about possible reasons of why Rosa stopped visiting us. Not only did Klara use her narrow selective logic in response to us, we also tried this same narrow reasoning to address her, and showed the limitations of using such narrow reasoning. The difference was that she believed in using selective logical reasoning and we did not. Was it our hypocrisy? Could we defeat Klara using her own weapon? Using Audre Lorde's (1984) famous phrase, "Can master tool be used to dismantle the master house?" Lorde thought it cannot, but Lisa Delpit (1995)

thinks it can. Could we present our objections to Klara in a different way without using her telling-mama-truth-to-your-face logical way? If so, what might it be? Should teachers tell their students mama-truth about their shortcomings to their face? Why? Why not? What are the alternatives? Finally (for now), does presentation of truth affect the truth itself? Ontological dialogue involves an inquiry puzzle that emerges in and addresses life. It involves a critical examination of life, self, world, and society to understand and envision life not only as it is but also as it is "supposed to be."

This case of ontological dialogue is outside of an educational institution but arguably it has an educational value of an inquiry and it placed us, my wife and me, in the role of educators, facilitating exploration of this inquiry. But is this pedagogical dialogue really ontological? This question cannot be addressed without taking the observers into consideration. Dear reader, if my excerpt managed to interest you to such an extent that you wish to discuss these issues further with me, Klara, my wife, silent Tanya, Grice, Lorde, Delpit, and other people that I did not mentioned above, my example of ontological dialogue has been successful, but if not, then, sorry, it was not successful. As a successful example, ontological dialogue does not exist without your, the reader's, engagement. I used my case because I thought it would be easier to engage you in a puzzle (but I could be wrong – if so, sorry). However, sociolinguists (and Bakhtin) used very mundane, almost dull, trivial examples to discuss and analyze ontological dialogue (see, for example, Linell, 1998). See the following examples from Bakhtin,

In the ordinary speech of our everyday life such a use of another's words is extremely widespread, especially in dialogue, where one speaker very often literally repeats the statement of the other speaker, investing it with new value and accenting it in his own way – with expressions of doubt, indignation, irony, mockery, ridicule, and the like. (Linell, 1998, p. 194)

The embedding of words and especially of accents from the other's rejoinder in Makar Devushkin's speech is even more marked and obvious in the second of the quoted passages. The words containing the other's polemically exaggerated accent are even enclosed here in quotation marks: "He's a copying clerk" In the preceding lines the word "copy" is repeated three times. In each of these three instances the other's potential accent is present in the word "copy," but it is suppressed by Devushkin's own accent; however, it becomes constantly stronger, until it finally breaks through and assumes the form of the other's direct speech. We are presented here, therefore, with gradations of gradual intensification in the other's accent: "I know very well, of course, that I don't do much by copying . . . [then follows a reservation] Why, what if I am a copying clerk, after all? What harm is there in copying, after all? 'He's a COPYING clerk!'" We have indicated by italics and underscoring the other's accent and its gradual intensification, which finally dominates utterly the line of discourse enclosed in quotation marks. But even in these final words, obviously belonging to the other, Devushkin's own voice is present too, for he polemically exaggerates the other's accent. As the other person's accent intensifies, so does Devushkin's counter-accent. (Bakhtin, 1999, pp. 208–209)

The notion of ontological dialogue reminds me of a quantum particle that is both localized and distributed. Ontological dialogue is localized in the events – it is always here-and-now (like a particle). But it is also distributed in time and space – it does not have the beginning and the end (like a wave). It does not have cause or genesis.

Another important feature of the (ontological) dialogue, according to Bakhtin, is that it knows neither genesis nor causality. Dostoevsky did not use such a fundamental German classical philosophical category as becoming or evolution. For him, the central philosophical categories were such notions as "coexistence and interaction" (Bakhtin, 1999, p. 28). Drawing from Dostoevsky, Bakhtin questioned the relevance of

dialectics when it comes to a finalizing synthesis of contradictions and differences. This was not a particularly safe thing to do in a thoroughly Marxist and therefore "dialectic" country. For Bakhtin, differences never fully merge, instead, they coexist in an engaged interaction. Dostoevsky, an embodiment of dialogical thinking for Bakhtin, saw everything as coexisting in one single moment. He could only understand the world as coexistence of different things. This does not mean that Bakhtin denied the importance of change. What he rejected was the ideas of genesis, where the past determines the present. He also rejected the reduction of difference (synthesis) as the end of development. Dialogue does not reduce plurality of human worlds and yet it connects various parts of this plurality (Sidorkin, 1999, p. 18).

Studying and revealing ontological dialogue means to engage and change it. It cannot remain the same and non-contaminated by the new understanding that the researcher brings, by the researcher addressing and replying to its participants, since a case of ontological dialogue is in the researcher's response provoked by the presented case and its participants. Inter-observational consensus is not a proxy of the validity of interpretation anymore as traditional research is. An interpretation is validated through its testing and depth – i.e., through internally persuasive discourse involving agreements, disagreements, and changing topics. Ontological dialogue requires very different research than traditional social research. It is oriented toward a dialogic partner – rather than toward a silent object (Bakhtin, 1986).

15.3.3 Ecological Non-Instrumental Dialogic Pedagogies

I am not sure that the non-instrumental *ecological* dialogic pedagogy exists in the sense that I have understood it. But it may exist in practice in a way that has not been described and/or published yet, or I have not accessed or

recognized yet. I have got a gist and inspiration of this approach by reading sociolinguist Per Linell's book (1998) and educational philosopher Alexander Sidorkin's book (1999). The non-instrumental ecological approach to dialogic pedagogy focuses on:

1 the dialogicity (Bakhtin, 1999; Matusov, 2009a, ch. 5) of the mundane everyday social interaction;
2 the non-constrained nature of this interactional regime in which the participants can have freedom to move in and out of the interaction, remain silent, change and modify the themes, and engage simultaneously in several activities and agendas;
3 absence or minimum of pedagogical coercion and violence.

Using the agricultural metaphor of "free-range chicken," I would define the participants in this dialogue as free-range dialogic participants.

Arguably, Sidorkin (1999, pp. 73–108) has pioneered the description of this free-range mundane dialogue in his ecological theory of three drinks. Observing restrained and unrestrained social interactions among children in school, he extracted three types of dialogue that he compared with types of dialogue one can experienceat a party involving alcohol: (a) monothematic, (b) polythematic, and (c) chaotic. In his book, Sidorkin argues that these three types of dialogue (and their dynamics) constitute the necessary fabric of overall dialogic ecology. Any attempt to temporarily extend one type of dialogue at expense of the others puts stress on the participants' psychological well-being (the participants become extremely tired), the quality of their relation, and emergence of aggression, non-cooperation, and pedagogical violence. However, many conventional and even innovative pedagogies prioritize exactly the monothematic dialogues in their classroom and put a lot of efforts on suppressing any emergence of the chaotic dialogues with multiple and highly ill-defined themes (or better to say germs of the

themes). The last mentioned can be crucial for the participants' socializing, negotiation, and goal defining processes. I see this interesting development in the literature on dialogue and dialogic pedagogy as a potential call for "free-range dialogic pedagogy."

In my view, famous avant-garde composer John Cage helped to visualize a version of the non-instrumental ecological approach in the following Buddhist legend,

We are inevitably, each minute, wherever we are, without lifting a finger, without anything being transmitted, unavoidably being educated [p. 115] . . .

I think you have to begin, quite conscientiously, with the notion that education is taking place without its being any effort, without doing anything – that would already be a step in the right direction. I give you two instances. In the 12th century there was a great man in the time of Dante and Meister Eckhart, but he lived in Tibet, and his name was Mila Repa. He studied, first Black Magic because he wanted to get even with his mother's relatives who had been cruel to her – and he was able, from a distance, to bring hailstorms down on their property, but at the same time not to have the hail destroy his mother's property. He was able to bring buildings down when they came together for dances and killed whole groups of the evil relatives. After he accomplished all this revenge and Black Magic activity, he then went to a teacher of White Magic, to study White Magic in a spirit of repenting, you know. Well, that teacher taught him absolutely nothing for years – just let him live in the house and eventually Mila Repa became very impatient, because he was of the opinion that he wasn't learning anything – nothing was being taught to him. At one point he became so alarmed that he secretly left the teacher and went to another teacher, but the first teacher was clairvoyant and knew where he was going and what he was doing and everything and sent a message, mentally, to the second teacher telling him to refuse to take Mila. So Mila Repa was obliged to come back to his teacher who looked as though he were teaching him nothing and by this process of not teaching, he

ultimately educated him: and he became one of the greatest leaders of Tibetan spiritual life. This story occurs over and over again in the annals of Zen Buddhism – the student who comes to the teacher and begs him for instruction. The teacher says nothing – he's just sweeping up leaves. The student goes off into another part of the forest and builds his own house and when he is finally educated what does he do? He doesn't thank himself: he goes back to the teacher who said nothing and thanks him. It's this spirit of not teaching which has been completely lost in our educational system. We had a great man in the United States, Thorsten Veblen, who wrote a book called "Higher Learning in America." The original subtitle was "A Study in Total Depravity." Why? Because the educational system in the United States is under the control of all the things to do with politics and economics. All of these things which are transmitted as though they were the things we had to learn are, in truth, means to force us into the accepted social structure. Therefore, the educational system as it is at present distorts and enslaves the mind. You want to know the basic thing I am interested in? The basic thing, I would say, is to do nothing. The second thing would be to do, so to speak, what enters our heads. It should not be fixed in advance what that would be. (Filliou & Cage, 1970, p. 116)

There can be several objections of the non-instrumental ecological approach to dialogic pedagogy:

1 reduction of the notion of dialogue to any social interaction;

2 "mundanization" of dialogue and learning (i.e., no education, no the sublime, no high culture);

3 no critical view on the free-range dialogue that might have very violent overtone even in the absence of pedagogical violence (i.e., vertical, authority-based) but the emergence of mob-type horizontal violence of peers (see Lensmire, 1994, for his wonderful ethnography and analysis of this possibility);

4 ecological formalism – focus on the intersubjective forms of dialogue and psychological dynamics at expense of the dialogic meanings and dialogic events.

Although I agree with this critic of this extreme (pure) ecologic approach to dialogic pedagogy, I appreciate its concerns with human ecology of dialogue and with vertical authority-based pedagogical coercion and even violence. Both concerns are not typical and rare for our educational community.

15.4 Anti-Conclusion

In this final section, I want to raise several unresolved issues with the instrumental versus non-instrumental education in general and with the (ontological) dialogic pedagogy in specific. My first issue is the relationship between non-educational and educational *goals* in educational practices, regardless of how education is defined. Educators are often faced with non-educational goals such as babysitting, ensuring personal and social safety, providing health, policing students/children, and so on. Of course, all these non-educational goals and concerns have educational aspects but I am talking here about necessity of non-educational actions that go beyond and even against educational goals. Although, I argue that on average educational goals have to be prioritized in educational practices, there can be moments when non-educational goals must take priority. The drawing of legitimate boundaries between educational and non-educational goals and concerns are very important in educational practices, as arguably non-educational goals often illegitimately invade the sphere of education (e.g., "the zero tolerance" policies in the USA) (Matusov & Marjanovic-Shane, 2011).

My second issue is about the relationship between *educational* instrumental and non-instrumental spheres. When one of these spheres are prioritize by educators the relationship between these espoused pedagogical approaches become adversarial. However, when

these spheres are seen as aspects of the educational practice and not as priorities, their relations can be complementary, although not symmetrical. Thus, even in non-instrumental ontological dialogic pedagogy, the issue of instrumental aspect of this pedagogy is there on different levels. One level is instrumentalism of pedagogical design, which generates the issue of the pedagogical design of ontological dialogic pedagogy and its spirit.

The third issue is about the relationship among instrumental, creative, and critical *aspects* of any education, which involve learning the existing practice as it is, transcending the given practice, and critical examination of the existing and imaginative practices. Even though, critical ontological dialogic pedagogy prioritizes critical examination, it stills involves the other two aspects. One hypothesis is that the other two aspects are by-productive but it requires a more systematic investigation. This issue may also relate to the issue of the relationship between pattern recognition, creative meaning making, and critical meaning making (Matusov & Marjanovic-Shane, 2017) – what are differences among all of these processes from a critical ontologic (i.e., critique of the current life) dialogic pedagogy point of view?

The fourth issue is about the *relationship* between the critical ontologic dialogic pedagogy and all other educational approaches: dialogic or not, instrumental or not. On the one hand, the critical ontological pedagogy provides a vision of "the best" pedagogy for the proponents of this approach. However, on the other hand, it argues for a dialogic relationship with, rather than annihilation of, others. From a Bakhtin-inspired ontological dialogic pedagogy's point of view, this approach has inherent internal dialogism: even adversarial approaches contribute to the meaning defining ontological dialogic pedagogy. Paraphrasing Bakhtin's famous statement about culture, ontological dialogic pedagogy does not have its internal territory but

lives on boundaries with other, alternative, pedagogical approaches (including non-dialogical, instrumental, and adversarial). Also, from the critical ontologic dialogic pedagogy, the issue of what constitutes good education has to be included in education as a part of itself (Matusov & Marjanovic-Shane, 2012, call this principle "praxis of praxis"). The principle of internal dialogism and the principle of praxis of praxis push the critical ontological dialogic pedagogy for pluralism that can be expressed by paraphrasing the famous motto about pluralism of speech, "I may disagree with your pedagogical approach but I'm ready to give my life for your freedom to practice it." This tension between the visionary aspect and the pluralist aspect of the critical ontological pedagogy may constitute important dualism in the critical ontological dialogic pedagogy (Matusov & Marjanovic-Shane, 2011, 2016).

Finally, the fifth issue about the instrumental-non-instrumental opposition in education I want to bring here is sociocultural. As I argue above, non-instrumental education, as a fundamental human desire for education for education sake, requires freedom from survival and necessities, from labor and work (Arendt, 1958). This freedom is always relative, both for the individual and for society. Thus, within the individual there will always be pressure and a need for instrumental education along the line with a desire for non-instrumental education. As to the society, there may still be division of the society with those who may primarily (or entirely) engage in labor/work and those who may primarily (or entirely) engage in leisure that can afford non-instrumental education (Gorz, 1989). Resolving this non-universality, i.e., hybridity, of a leisure-based society will be probably based on advances of technology of smart machines, political will and struggle, economic and environmental pressures, and contended cultural definitions of justice and "good life." Until then, critical ontological dialogic pedagogy may remain on the periphery and in oases of the formal educational

institutional sphere, even perceived by some as elitist, suitable only for those who are not very pressed by survival or necessities.

I wonder if these tensions between instrumental and non-instrumental education in general and in dialogic pedagogy in specific penetrates other field of social sciences in general and psychology in specific by being important, relevant, or at least interesting.

Acknowledgments

Notes

1 "Once in the mid-1990s, I wanted to visit an innovative school in California but the founder of the school told me that I could not come on Tuesday because they 'do community of learners' only on Mondays, Wednesdays, and Fridays" (Matusov, 2009a, p. 75; see also, Matusov, von Duyke, & Han, 2012).

2 "High culture" often refers to high esteem cultural products of arts and science of the past and present. "In more popular terms, it is the culture of an upper class such as an aristocracy or an intelligentsia, but it can also be defined as a repository of a broad cultural knowledge, a way of transcending the class system. It is contrasted with the low culture or popular culture of, variously, the less educated, barbarians, Philistines, or the masses" https://en.wikipedia.org/wiki/High_culture

3 There has been an unfortunate modern trend in social sciences to categorically and universally reject any dichotomy by often referring to complexity of social phenomena. In my view, this is an unfortunate development for two main reasons. First, social sciences do not study complexity of social phenomena per se, as positivists claim, but our human relationships with this complexity, which do not preclude us from our dichotomist judgment for particular purposes and

contexts. Second, ironically, an anti-dichotomist stand, which dividing positions on dichotomous and non-dichotomous with the former being bad and the latter being good, is self-contradictory because it is meta-dichotomist in itself. My position is that some dichotomies are good but some bad and this is not solely defined by how complex a social phenomenon is but also, and even more importantly, it depends on our relationship with the phenomenon, our purposes, and other contexts. For example, such a complex socio-politico-economic phenomenon as slavery may warrant both a dichotomous moral analysis of its oppression and a non-dichotomous historical analysis of attempts to soften slavery. Non-positivist rehabilitation of dichotomies is badly needed in social sciences.

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