



## Transdisciplinary Framework

This study has been realised in a transdisciplinary research framework of applied linguistics (Kramsch & Perrin, 2018). In research practice, this means that I collaborated with stakeholders and practitioners from the financial community, consisting of financial analysts, financial journalists, rating agencies, and investors (Sect. 4.4.4). All the participants were informed that the results of our collaboration would be published in this book.

The goal was to establish a mutually fruitful collaboration, throughout the project, with benefits for all participants. First, the collaborative development of the research question should heighten the awareness for each other's needs and interests, but also lead to a shared language (see 2.1–2.11, and Whitehouse et al., 2021) as a solid base for mutual understanding. Second, the collaboration should allow me to gather data from practice, and in return, practitioners should gain new insights from the empirically saturated and theoretically grounded analyses. Third, the interim results (Chapters 4–6) should help practitioners detect white spots in their professional knowledge and repertoires of practices. These white spots would then be addressed with courses by me in the form of individual coaching, in-house training, and organisational development (Chapter 9), which in return would provide opportunities to evaluate the practical relevance of the new knowledge—did the chosen measures

Practice partners	Who	Selection	Duration	Method / Place / Situation	Chapter
BANK 1	11 financial analysts	purposive, by institution	2010 Jan–Oct	progression analysis / workplace / recorded on the job during intervention	III 8 III 9.1
BANK 2	60 financial analysts	purposive, by participants	2012 Sep–Dec	text product analysis / classroom / writing training	III 9.2
BANK 2	73 financial analysts	purposive, by business unit	2012–2013	text product analysis / workplace / focussed training sessions	III 9.2
several banks and companies	182 participants in writing courses	purposive, by institutions	2012–2020	semi-structured interviews / classroom / writing coaching	II 6
EDITORIAL TEAM (regional bank)	5 team members 63 financial analysts	purposive, by institution	2014–2015	organizational ethnography / financial analysis unit / organizational development	III 9.3
financial news agency	12 Swiss financial journalists	theoretical sampling	2017–2019	semi-structured interviews / workplace / personal meeting	II 4

**Fig. 2.1** Overview of transdisciplinary collaboration

solved pivotal problems—and generate new data for follow-up research in prolonged collaboration (Chapter 10).

The following table (Fig. 2.1) provides an overview of the transdisciplinary collaboration with practitioners. Indicated are the practice partners as entities; who of these entities participated; how the participants were selected; the time span of the collaboration; the method, place, and situation of the collaboration; and in which chapter of the book the collaboration is discussed.

The next paragraphs follow Whitehouse et al. (2021) in providing the working definitions for the key terms related to this transdisciplinary framework in the present book. I start by explaining the main characteristics of transdisciplinarity (2.1), the foundation of the research framework. Then, I provide the working definitions of the key concepts used in this framework. A first group of key concepts refers to the context reconstructed with ethnographic methods: professional setting (2.2); context awareness (2.3); language awareness (2.4); and financial literacy (2.5). The second group includes concepts referring to the text products' desired (and analysed) properties: comprehensibility (2.6) and comprehensiveness (2.7). The third group of key concepts denotes processes performed by the agents under investigation: cross-domain translation (2.8); argumentation (2.9); and, in general, text production practices

(2.10). Finally, context, product, and process perspectives are combined in the synopsis of situated activity fields in text production and writing (2.11).

## 2.1 TRANSDISCIPLINARITY

In line with a widespread understanding in knowledge theory, transdisciplinarity is defined for this book as the systematic cooperation of science and professional practice for the sustainable solution of socially significant practical problems (e.g., Kramsch & Perrin, 2018; Nowotny, 1997; Pohl et al., 2006). The process-oriented term *transdisciplinary action research* foregrounds the fact that researchers participate in the field of research and the project aims at taking measures, taking action to make a change (Hammersley, 2004; Kemmis, 1988; Wagemans & Witschge, 2019). Goal is the improvement of practical work (Perrin, 2012) in the joint elaboration of quality concepts regarding the practices under investigation. These quality concepts are not universal, they do not apply everywhere, always and exclusively, but are bound to conditions, and to context factors. Such situated or situative knowledge has been termed “mid-range theory” (Perrin, 2013, p. 8); it explains “what works for whom in what conditions” (Pawson & Tilley, 1997, p. 72).

## 2.2 PROFESSIONAL SETTING

By professional setting, I understand the constellation of material, social, and mental circumstances in which professionals and other stakeholders interact and communicate. Communication in a professional or workplace setting borrows from (and, in return, influences) general communicative practices and affects (and is affected by) the very process and nature of non-communicative professional activities. It develops within the frame of a professional culture, with which both novice and experienced professionals are expected to be familiar. This results in “groups who regularly engage with each other in the service of a joint enterprise, and who share a repertoire of resources that enables them to communicate in a kind of verbal shorthand that is often difficult for outsiders to penetrate” (Holmes & Marra, 2014, p. 114). Ethnographies of professional settings (Chapter 4) allow researchers to gain insight into participants’ sense-making practices by analysing “the domain’s origins, history, culture, features, heroes and principal players” (Resche, 2013, p. 42–43).

### 2.3 CONTEXT AWARENESS

By context awareness, I understand interlocutors' attentiveness, perception, and consciousness regarding the communicative setting and environment. This includes their interest and ability to gather information about their audience's pre-knowledge (i.e., their knowledge previous to the exposure to the communicational offer), needs, and cultural background, and to offer suitable communication products. In practice, it means that the interlocutors build up appropriate mental representations of their target audience, develop the skills to address this audience in principle—and mobilise the ability and willpower to actually do so in a given communication situation (Rigotti & Rocci, 2006).

### 2.4 LANGUAGE AWARENESS

By language awareness, I understand interlocutors' attentiveness, perception, and consciousness in identifying, analysing, and solving practical problems of language use in specific communication situations, within, across, and beyond domains and professional settings (based on Perrin, 2013 and Handford et al., 2019). While language awareness shapes people's engagement with language, it is, at the same time, shaped by this engagement (Svalberg, 2007). When developing shared languages to overcome communicative boundaries between domains and settings, language users both require and develop language awareness. This process has been analysed by combining cognitive, affective, power-related, social, and performative dimensions (Garrett, 2010).

### 2.5 FINANCIAL LITERACY

I follow the Organisation for Economic Co-operation and Development OECD in defining financial literacy as the “knowledge and understanding of financial concepts and risks, and the skills, motivation and confidence to apply such knowledge and understanding in order to make effective decisions across a range of financial contexts, to improve the financial well-being of individuals and society, and to enable participation in economic life” (OECD, 2014, p. 33). This definition was endorsed by G20 leaders and is used in a majority of countries (OECD/INFE, 2012).

## 2.6 COMPREHENSIBILITY

By comprehensibility, I understand the property of a text to be easy to read and understand for its target audience. Comprehensibility cannot be explained by linguistic and stylistic choices only: “There is something above and beyond grammatical comprehensibility—a functional understanding: understanding not only the text, but the practical consequences of the text” (Zödi, 2019, p. 252). A text which is comprehensible for one individual in a certain situation may be incomprehensible for another individual in the same setting due to different literacy, for example. This contextualised understanding of comprehensibility explains why context awareness is relevant for communicational success—and why deep context knowledge is key for transdisciplinary research in a particular field.

## 2.7 COMPREHENSIVENESS

By comprehensiveness, I understand the property of a text to contain all the pieces of information that are necessary, relevant, and comprehensible (2.6) for the target audience. Contextual understanding allows for an assessment of the necessity and the relevance of a piece of information. Similarly, such understanding enables readers to identify information gaps in an argumentation line or in an entire text. Getting all the relevant information—in a comprehensive text—is a precondition for informed decisions, for example, about whether to buy, hold, or sell shares or to vote for or against new financial laws and policies. The combination of comprehensiveness and comprehensibility indicates whether a text can fully exploit its communicative potential.

## 2.8 CROSS-DOMAIN TRANSLATION

By cross-domain translation, I understand the ability to solve language-related problems in cross-domain situations. This requires both context awareness (2.3) and language awareness (2.4) as well as mediating knowledge across domains and their linguistic varieties. A successful communication between experts and laypersons calls, for example, for the translation of technical terms into everyday language. Organisations with large and heterogeneous audiences, such as banks, should take their target groups’ previous knowledge into account and communicate accordingly if they want to ensure that the audience comprehends their text products.

## 2.9 ARGUMENTATION

Addressing issues regarding the reasoning in financial analysts' investment recommendations in collaboration with practitioners requires analysis of the argumentative practices in the context of financial analysts' professional setting and its particularities (Andone & Rocci, 2016b). The core elements of this analysis need to expound the connection between the results of the financial analysts' evaluation models, their forecasts of future developments, and their advice for investors. This requires a thorough investigation of three elements: monological discourse, standpoint, and persuasion. In the following paragraphs, I outline the three core elements by drawing on examples from my own data. The examples are fully explained and discussed in Sect. 5.4.

Writing investment recommendations can be viewed as a **monological discourse**, "understood as a one-speaker discourse addressed to others" and "referred to by a large tradition simply as texts" Rocci, 2005, p. 114). Theoretical approaches from semantics and pragmatics help explain the meaning of monological discourses. Thereby, lexical semantics analyses word meanings and relations between them; logical semantics is concerned with sense, reference, presupposition, and implication; linguistic pragmatics deals with language in use, the contexts in which it is used as well as the communicative intentions.

Since there is no immediate mutual exchange between the financial analyst, as writer of investment recommendations, and the investors, as receivers of the investment advice, this study does not apply dialectical theories that "generally model an argumentative dialog as a critical discussion between a protagonist (or proponent) and an antagonist (opponent) over an issue concerning the acceptability of a standpoint" (Palmieri et al., 2015, p. 123). The concept of standpoint, however, represents an important issue in financial analysts' investment recommendations.

Financial analysts are hired and paid to develop a standpoint and take a stance regarding matters in the financial markets and to explain, justify, and promote it (Biber, 2004; Hyland, 2005). The analysts hence need to engage in argumentative practices in their communication. "Argumentation is a form of communication in which reasons are given to justify the acceptability of an uncertain proposition at issue, called standpoint" (Palmieri et al., 2015, p. 123). A typology of standpoints was developed by Palmieri, Rocci, and Kudrautsava (Palmieri et al., 2015, p. 125–126; see also Jacobs, 2000). According to this typology, there are five types of

theoretically possible semantic standpoints: descriptive, predictive, evaluative, practical, and explanatory standpoints. Following this typology, the definitions below are used for this book:

**DESCRIPTIVE** standpoints refer to situations that require evidence in support of factual statements, e.g., the financial analyst comments on the key figures of a company to emphasise her assessment.

Example: “The stock trades on FY 15E (end August)  $21.2 \times \text{PE}$ .” (company updates English, updat\_E\_UBS\_barry callebaut\_2014-04-03).

**PREDICTIVE** standpoints relate to future matters, providing reasons which increase the plausibility regarding a forecast or expectation, e.g., the financial analyst explains the future scenario based on his calculation models.

Example: “We expect top-line results to remain robust for the full-year.” (company updates English, updat\_E\_argus\_rapid nutrition\_2020-05-11).

**EVALUATIVE** standpoints concern situations in which the adequateness and due diligence of an assessment or valuation are defended with respect to previous expectations, e.g., the financial analyst has to explain why her forecasts diverge from the actual development.

Example: “We think Barry Callebaut is a quality company with attractive prospects medium to long term. Buy rating.” (company updates English, updat\_E\_UBS\_barry callebaut\_2014-04-03).

**PRACTICAL** standpoints refer to the usefulness, worthiness, and the leverage of a proposed action, e.g., the financial analyst shares his thoughts as to how a company could improve its equity basis.

Example: “Temenos now needs to post a flow of systems replacement deals validating substantial R&D spend.” (company updates English, updat\_E\_jefferies\_temenos\_2014-04-03).

**EXPLANATORY** standpoints relate to the causal link between matters, e.g., the financial analyst discusses why her predictions of a company’s earnings figures turned out to be different from reality.

Example: “North America accounts for nearly half of the multi-billion dollar global weight-management market and has shown favourable end-user trends due to an expanding obese population and largely recession-proof market demand.” (company updates English, updat\_E\_argus\_rapid nutrition\_2020-05-11).

Whereas the above definitions are useful for the analysis of semantic aspects of financial analysts’ monological discourses, the analysis of pragmatic aspects requires the inclusion of contextual factors: “all fields

of activity have their own material constraints which influence to a great extent the unfolding of the argumentative discussions at issue” (Andone & Rocci, 2016a, p. 3). In this study, these contextual factors are provided by a long-term ethnographic analysis in the field (Chapter 4).

Financial analysts’ investment recommendations need to **persuade** investors such that they can make informed decisions regarding their investments. “We can view rational persuasion through argumentation as the act of enabling and inducing a decision process in the addressee” (Rocci, 2005, p. 99). Thereby, the persuasion should be based on explicable factors which build credibility and trust: “persuasion is achieved by the speaker’s personal character when the speech is so spoken as to make us think him credible” (Aristotle, 350 A.D.). Vice versa, credibility and trust need to be the basis for investors’ willingness to be persuaded by financial analysts: “Credibility, integrity and professional competence are the capital of financial analysts” (Bucher, 2016, p. 2).

## 2.10 TEXT PRODUCTION PRACTICES

Writing and text production in professional settings are intertwined in practices. By professional practices, I understand the professionally qualifying activities by which language users produce written and multimodal texts. Practices fulfil communicative functions, such as recommending stocks to investors, and are repeated and reproduced over and over again by the stakeholder groups such as financial analysts. While being aware of context and language in a constantly changing environment, the holders of specific roles in an organisation aim at an appropriate completion of a reflected task. “Individual agents may plan actions specifically, but the habitus still reproduces the conditions of planning, such as past practices. The habitus is the source of strategies. Practice is never merely a mechanical reaction to roles or other mechanisms. Nor should we insist on the other extreme, that individuals are fully creative and act with full free will—dispositions affect action, and they are durable” (Bourdieu, 1977, p. 74–75).

Practices, hence, have a dynamic and a strategic component. If the strategic component is understood as “reinforced, conscious, and therefore articulable idea of how decisions are to be made during the act of writing so that the writing process or text product has a great probability of fulfilling the intended function” (Perrin, 2013, p. 55), then the writing practice is the strategically motivated act of writing (Bourdieu,



1977), the concrete writing process. The dynamic component becomes evident on a macro-level in that practices alter their environment and are simultaneously changed by the environment, whereby the environment includes cultures, communities, and organisations. On a micro-level, the dynamic aspect shows that practices connect social, semiotic, material, and mental activities, they are “embodied” (Goodwin, 2000, p. 5): the thinking head, the typing fingers on the computer in the workplace, and the changing signs on the screen that influence the events and developments of the environment, e.g., the financial markets are impacted by an analyst’s recommendation to sell a stock.

Practices are constantly reflected and questioned by “the reflective practitioner”: “Indeed, practitioners themselves often reveal a capacity for reflection on their intuitive knowing in the midst of action and sometimes use this capacity to cope with the unique, uncertain, and conflicted situations of practice” (Schön, 1983, p. viii). As a consequence, practices are developed, amended, and changed by individuals (e.g., Jones & Stubbe, 2004) by interacting with their communities (Wenger, 1998), such as the financial community. In other words, the agents are aware of their practices to some extent whereas they most often are unaware of their routines, such as copy-pasting numbers in excel sheets.

Practices are always connected and interdependent of others and form patterns of activities, e.g., analysing the figures of a company and making an investment recommendation for the stock, and they complement each other, e.g., editing graphs and editing tables with key figures. Larger-scale practices such as writing a sector study can encompass smaller-scale practices such as analysing the figures of single companies which then embeds practices such as asking strategic questions at earnings calls. In other words: practices can contain practices (*practices* is a recursive, self-embedding concept), and the characteristics of practices can scale up and down, such as writing a sector study and writing an intraday investment recommendation.

In the professional setting as multi-tiered context, practices are time-bound: they interconnect and interact with contexts of various durability and scopes. For the analysis of practices regarding the writing of investment recommendations, for example, practices can be contextualised on three levels: an upper level of the global stock markets’ development; a middle level of the banks’ published overall fund allocation strategy; and a lower level of analysis and investment recommendations on sectors and stocks by the individual financial analyst.

Whereas the structures and interactions at the highest level cannot be influenced easily, connections and interdependencies at the middle and lower levels are partly experienced and can be steered to a larger extent by the practitioners involved.

At the middle level, i.e., the banks' published overall fund allocation strategy, practices interact with organisations, such as a proofreading team which is one of the stages in the chain of writing investment recommendations and value creation. Value is created by gathering market data, analysing it and show the overall investment strategy for the organisation, which serves as guideline for the next lower instance, the financial analysts.

At a lower level, the individual writing activity, financial analysts constantly have to decide for certain text production activities and against others. While this decision-making is largely routinised, it can be reflected and changed. On the one hand, the participants can individually form the practices; on the other hand, the practices are embedded in a scaling production context in their professional setting and are therefore related to other participants in text production.

## 2.11 ACTIVITY FIELDS IN TEXT PRODUCTION AND WRITING

Addressing issues in text production and writing in collaboration with practitioners requires analysis in all the stages of the writing process and on all levels of text production in context.

A model that offers a typology of activity fields of real-life writing “and outlines their dynamics” is discussed by Jakobs & Perrin (Jakobs & Perrin, 2014, p. 27). According to the model, writing in the workplace emerges as a helix of four key activities (HANDLING TOOLS ENVIRONMENT, HANDLING TASK ENVIRONMENT, HANDLING SOCIAL ENVIRONMENT, and READING TEXT), embedded in and interacting with twelve activity types of (multimodal) text production (Fig. 2.2). Taking scalability into account, the model covers text production activities from macro to micro levels.

The following paragraphs outline the activity fields from a context, product, and process perspective and illustrate them with examples from my own data. The examples are fully explained and discussed in Appendix B.

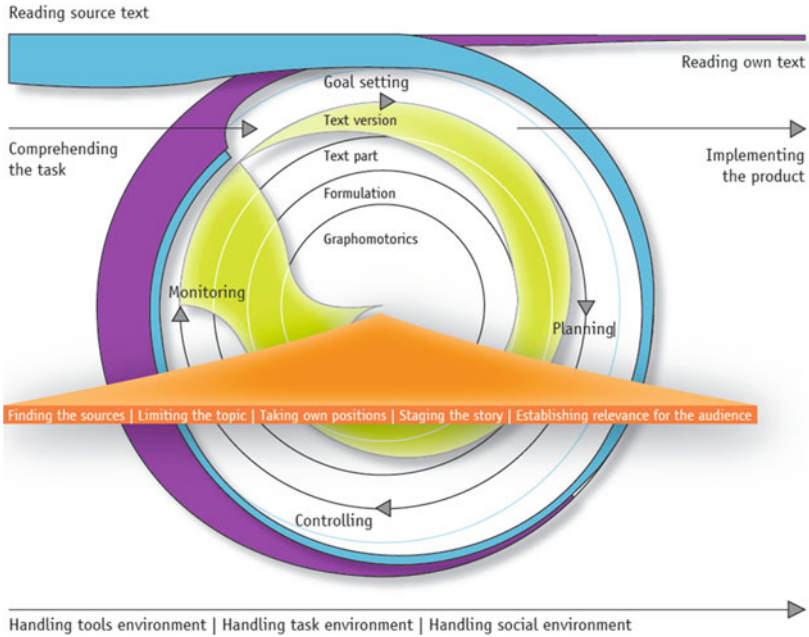


Fig. 2.2 Text production activities (Perrin, 2013, p. 194)

From a context perspective (Chapter 4), writing begins when writers accept and understand a text production task (COMPREHENDING THE TASK), e.g., picturing the audience (Appendix B, statement no. 154), and calculating text production time (090). Writers then need to cope with handling the tools, task, and social environment: HANDLING TOOLS ENVIRONMENT includes practices such as applying writing techniques (096), and implementing quality checks (133); HANDLING TASK ENVIRONMENT comprises, e.g., prioritising tasks (147), and allocating resources (059); and HANDLING SOCIAL ENVIRONMENT includes, e.g., collaborating with colleagues (089), and interacting with stakeholders (061). The writing ends when writers send their text product along the production chain (IMPLEMENTING THE PRODUCT), which requires practices such as, e.g., editing (157), and online publishing (174).

From a product perspective (Chapter 5), writing often starts with FINDING THE SOURCES, including, e.g., contacting experts in the field (075), and studying potential sources (138), where the writer decides

whose stances and voices should be included in the text. At the same time, the writer needs to be aware of **LIMITING THE TOPIC**, including, e.g., distinguishing internal from external interests (080), and considering comprehensiveness (148). Hiding or showing stance in a text is reflected in the activity field **TAKING OWN POSITIONS** with practices such as choosing empty hedging phrases to fit any scenario (069) and adapting own position to the peers' position (075). By **STAGING THE STORY**, the writer decides the dramaturgy of a text by, e.g., setting a line of argumentation (006) and selecting an appealing headline (011). Based on context awareness, the writer includes the prior knowledge of the audience and decides which semiotics means are appropriate for **ESTABLISHING RELEVANCE FOR THE AUDIENCE** by, e.g., writing comprehensibly and comprehensively (179) and taking into account the audience's literacy (056).

From a process perspective (Chapter 6), four phases overlap and recur, each dominated by activities which contribute to the incremental production of the text. **GOAL SETTING** concerns the text as a whole where writers, e.g., develop a vision for the text (048) and define the key message (140). **PLANNING** relates to sequences of text parts with practices such as setting up a plan for the text structure (023) and allocating time slots to the writing task (103). **CONTROLLING** focuses on formulations under construction with practices such as neglecting orthography while writing (026) and postponing other tasks (e.g., checking emails) in order to stay in the writing flow (102). Whereas the three aforementioned activity fields focus on particular tasks, **MONITORING** traces the results of the production process throughout all levels, e.g., ensuring that the text quality corresponds to the audience's needs (134) and checking whether the text fulfils the requirements of the task (018).

Given that this book has been written in a transdisciplinary collaboration, it is important to systematically map—and distinguish between—the researcher's analytical perspective and the practitioners' foci of problems and solutions. The upper part of the table below (Fig. 2.3) hence shows the 16 activity fields of the text production process and their most dominant relation to managing text production context, managing the process itself, or developing the emerging product. This is the analytical perspective as developed in this book.

The lower table in contrast groups the activity fields from a practitioner's focus. Regarding lack of time, paradoxical task, blurred target group, and editorial team, practitioners issues typically occur in these listed activity fields.

Perspective	Activity field(s)	Chapter
context	COMPREHENDING THE TASK, HANDLING TOOLS ENVIRONMENT, HANDLING TASK ENVIRONMENT, HANDLING SOCIAL ENVIRONMENT, IMPLEMENTING THE PRODUCT	I 2.11
product	FINDING THE SOURCES, LIMITING THE TOPIC, TAKING OWN POSITIONS, STAGING THE STORY, ESTABLISHING RELEVANCE FOR THE AUDIENCE	I 2.11
process	GOAL SETTING, PLANNING, CONTROLLING, MONITORING	I 2.11
Focus*	Activity field(s)	Chapter
lack of time	CONTROLLING, ESTABLISHING RELEVANCE FOR THE AUDIENCE, COMPREHENDING THE TASK, HANDLING TOOLS ENVIRONMENT, HANDLING SOCIAL ENVIRONMENT, MONITORING, STAGING THE STORY	II 6.4.1.a
paradoxical task	CONTROLLING, ESTABLISHING RELEVANCE FOR THE AUDIENCE, COMPREHENDING THE TASK, HANDLING TOOLS ENVIRONMENT, HANDLING SOCIAL ENVIRONMENT, MONITORING, STAGING THE STORY	II 6.4.1.b
blurred target group	CONTROLLING, ESTABLISHING RELEVANCE FOR THE AUDIENCE, COMPREHENDING THE TASK, HANDLING TOOLS ENVIRONMENT, HANDLING SOCIAL ENVIRONMENT, MONITORING, STAGING THE STORY	II 6.4.1.c
EDITORIAL TEAM	FINDING THE SOURCES, LIMITING THE TOPIC, TAKING OWN POSITIONS, STAGING THE STORY, ESTABLISHING RELEVANCE FOR THE AUDIENCE	III 9.2.3

\*Looking at the managing of the process, the emerging product, and the dynamic context

**Fig. 2.3** Activity fields in text production and writing and their application throughout the book

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