

On the Promise of Using Membership Categorization Analysis to Investigate Interactional Competence

David Wei Dai^{1,*}  and Michael Davey²

¹International Centre for Intercultural Studies, UCL Institute of Education, University College London, 20 Bedford Way, Bloomsbury, London WC1H 0AL, UK

²School of Languages and Linguistics, Faculty of Arts, University of Melbourne, Parkville VIC 3052, Australia

E-mail: dr.david.wei.dai@gmail.com

Interactional Competence (IC) involves speakers' ability to make social actions recognizable to one another while taking into account individual identities and social role relationships (Hall and Pekarek Doehler 2011). Existing IC research, however, has foregrounded the sequential features of interaction while paying less attention to the categorial resources speakers draw on. This study uses Membership Categorization Analysis (MCA) to explicate the categorial resources speakers employ in interaction. The dataset comes from 22 participants with a mixture of first-language and second-language Chinese speakers. They were audio-recorded while undertaking a roleplay task in Chinese—assuming the role of an employee and complaining to their manager about unfair practices at work. After analysing the transcribed data using the MCA procedure (Stokoe 2012), we present analyses that address three foundational questions about how speakers use categorial resources to (i) make their social actions recognizable, (ii) respond to interlocutors' social actions, and (iii) orient to the moral order of interaction. We argue MCA can provide important insight into the categorial nature of interaction in IC research.

Introduction

Humans take on identity categories when they talk and talk identity categories into existence. Whether it is everyday interaction, academic discourse, or workplace communication, we invariably act out specific categories, such as 'a tenant', 'a student', or 'an employee'. Reflexively we design and adjust our language use and interaction according to the categories our interlocutors assume, be they 'a landlord', 'a teacher', or 'an employer'. This categorial ability undergirds human sociality and forms an integral dimension of a person's ability to interact, termed their Interactional Competence (IC).

As part of a highly influential working definition of IC, Hall and Pekarek Doehler (2011: 1) describe IC as 'our ability to accomplish meaningful social actions, to respond to co-participants' previous actions and to make recognizable for others what our actions are and how these relate to their own actions'. This part of their IC definition explicates the sequential dimension of IC, as

action formation and response are achieved over multiple turns and sequences. The sequential nature of interaction has indeed received sustained attention in IC scholarship thus far, powered by the analytic procedure of Conversation Analysis (CA) and CA's concomitant focus on sequence. What is less discussed in existing IC research, however, is the other half of Hall and Pekarek Doehler's IC definition, where IC manifests as the ability to 'constitute and manage our individual identities, our social role relationships, and memberships in our social groups and communities' (1). To unpack this categorial dimension of IC, we argue for the employment of the other analytic procedure devised by Sacks: Membership Categorization Analysis (MCA).

In this study, we examine how MCA can contribute to the sequence-driven tradition in IC research by offering a fuller account of what the ability to interact entails. This represents an initial step towards a sequential-categorial turn in IC research.

Background

Interactional Competence

Based on the theory, epistemology, and methodology of ethnomethodological conversation analysis (EMCA), research into IC sets out to identify and describe the practices and procedures that people use to accomplish successful interactions. Given this grounding in EMCA, some distinguishing features of IC work are (i) its commitment to a non-cognitivist and participant-centred perspective on the question of competence (Kasper 2006; Pekarek Doehler 2018), (ii) a fundamentally praxeological focus that prioritizes the question of what it is that participants are *doing* over concerns with the informational content of what participants are *saying* (Schegloff 1995), and (iii) an emic approach that seeks to understand conduct based on how it is oriented to by co-participants in local, co-constructed and incrementally emerging contexts of use (Lam et al. 2023). However, despite these theoretical and epistemological commonalities between IC research and its progenitor in CA, there exists one crucial difference between the traditions. While CA has largely been content to produce detailed descriptions of the 'members' methods' (Garfinkel 1967) that competent members of society use to produce orderly interactions and accomplish intersubjectivity, with its predominant focus on second language (L2) talk, IC scholarship in applied linguistics has gone one step further in attempting to distinguish between differing levels of competence. It conjectures that certain kinds of conduct can, in local instances of practical use, be more or less effective than others.

As work in IC has seen a 'burgeoning interest' (Lam 2021: 2) over the last ten to fifteen years, researchers have directed their attention to three major questions: (i) how IC develops as speakers gain competence over time (see Pekarek Doehler and Pochon-Berger 2015; Skogmyr Marian and Balaman 2018 for comprehensive overviews), (ii) how IC can be tested (Plough, Banerjee and Iwashita 2018; Youn and Burch 2020; Salaberry and Burch 2021; Dai 2022, in press a), and (iii) how IC can be taught (Salaberry and Kunitz 2019; Wong and Waring 2021; Dai et al. 2022; Dai 2023a, in press b). Research on the development of IC has, for the most part, proceeded down two parallel avenues. On the first of these, longitudinal studies have shown that as participants spend more time in a target culture or institutional setting, the members' methods they have available to them to manage interaction diversify, and their abilities to produce visibly context-sensitive and recipient-designed conduct improve (Cekaite 2007; Eskildsen and Wagner 2018; Pekarek Doehler 2018; Pekarek Doehler and Berger 2018; Pekarek Doehler and Skogmyr Marian 2022). On the second, researchers have compared the interactional performances of participants at different levels of L2 proficiency, again finding clear proficiency effects on the management of sequence (Al-Gahtani and Roever 2012) and preference organization (Pekarek Doehler and Pochon-Berger 2011; Al-Gahtani and Roever 2014, 2018). As we discuss further below (see 'What does MCA have to offer IC?'), the overwhelming majority of research on the development, testing, and teaching of IC has focused on sequential methods for accomplishing successful interaction. In this article, however, we demonstrate the affordances of MCA for the study of IC. Before mounting an argument as to why MCA has enormous potential for IC, we first give a brief introduction to this research tradition.

Membership Categorization Analysis

MCA is a strand of ethnomethodological inquiry that concerns itself with describing how it is that members of society go about using identity categories (e.g. 'heavy metal fan' and 'anti-vaxxer') to organize and make sense of the routine social activities that comprise their daily lives (Antaki and Widdicombe 1998). It explores the questions of how identity is produced in talk¹ as an interactional accomplishment and how participants deploy social categories as practical resources for pursuing particular courses of action and cooperatively making sense of the world (Silverman 1998; Stokoe 2012; Housley and Fitzgerald 2015; Lee 2018). There is, therefore, a fundamental difference between more traditional sociological approaches to identity and the ethnomethodological perspective embraced by MCA (Kasper 2009). Identity is not seen as a *reason* for conduct, but rather, is analysed as both a resource for producing recognizable action and an interactional outcome of such action. We are not interested in questions like 'Did this participant act in this way because she is a woman?', but rather, 'Was her gender demonstrably relevant to the participants themselves?' and even more so, 'What methods were employed to make gender relevant and how was it that these methods were recognizable and able to be made sense of by the participants?'

In the analyses that follow, we use a number of MCA concepts. Here we give a brief introduction to these analytical devices:

Category-bound activities/predicates.

As a matter of shared and routine common-sense knowledge, identity categories (like 'heavy metal fan') are linked to certain characteristic activities and proclivities (like *having long hair* and *regularly going to concerts*), such that reference to these activities may make an individual's potential incumbency of the bound category procedurally relevant (Schegloff 2007a; Stokoe 2012). Importantly, one upshot of this is that particular categorial incumbencies can be made relevant without any explicit mention of the category itself (Butler and Fitzgerald 2010).

Membership categorization devices (MCDs).

An MCD consists of a particular collection of categories that are hearable as belonging together and a set of rules for how such categories can be understood to relate to each other (Hester and Eglin 1997a). As an example, the category terms 'conductor', 'first violinist', and 'bassoonist' are collectable under the MCD [orchestra], while other terms, like 'gambler', do not belong to this collection (Schegloff 2007a).

Standardized relational pairs (SRPs).

SRPs consist of a dyadic arrangement of categories, the incumbents of which carry a set of mutual rights and responsibilities with regard to each other (Sacks 1972; Jayyusi 1984; Hester and Eglin 1997b). Thus, if we take for example the SRP {graduate student/supervisor},² it is expectable that the supervisor makes themselves available for regular meetings and provides constructive feedback on the student's drafts. Similarly, the student is expected to submit their work on time and formally acknowledge the supervisor's contributions to their research output.

What does MCA have to offer IC?

The overwhelming majority of the research that has been done to date on the development, teaching and testing of IC has focused on sequential methods for successful interaction. To take a handful of foundational examples that have proved seminal to the field, Cekaite (2007) investigated the development of *turn-taking* in L2 Swedish in a classroom context, showing how a focal participant developed an increasing ability to display an orientation to turn-taking norms and precision-time her turns to come in at places where speaker transition was sequentially relevant. Al-Gahtani and Roevers (2012; 2014) demonstrate a developmental pathway for the *sequence organization* of L2 requests, showing that, as their proficiency increases, learners use more preliminary moves to project, delay and lay the groundwork for an imminent request. And, in regard

to *preference organization*, Pekarek Doehler and Pochon-Berger (2011) show how the methods that L2 French learners use to do disagreements diversify with increasing proficiency. Despite the uncontroversial contribution that these studies, and the many like them that have followed in their wake, have made to our understanding of the IC construct, very few studies conducted under the IC banner have attempted to explore the specifically categorial methods, resources and practices that are used to produce conduct that is recognizably competent³ (see Dai 2022 and Roever and Dai 2021 for exceptions). Below, we highlight three distinct aspects of IC—producing recognizable social actions, responding appropriately to others' turns, and negotiating the moral order of interaction—that depend entirely on the concurrent operation of both sequential and categorial methods.

One underlying strand that runs through the sequence-driven tradition in IC research is the centrality of the problem of the recognizability of action. Competence relies in large part on our ability to recognize the social actions that our interlocutors are performing and produce our own actions in such a way as to be easily identifiable for what they are (Hall and Pekarek Doehler 2011; Pekarek Doehler 2018). While sequential methods (e.g. prefacing a request with preliminaries that project the likely nature of the upcoming action—see Al-Gahtani and Roever 2012, 2014) are clearly an indispensable part of producing recognizable social actions, categorial methods too play a vital role here. Both Schegloff (2007a) and Butler and Fitzgerald (2010) highlight the 'reflexive co-determination' (Schegloff 2007a: 473) between identity and action. This phrase refers to the way in which, on the one hand, a particular utterance may gain a hearing as performing one action or another depending on the locally relevant and publicly visible category incumbency of its speaker, and on the other, particular category incumbencies are made visible through participants' performance of related actions. To exemplify this, we might consider the requests in role-played interactions between a university student and their professor in Al-Gahtani and Roever (2012). In interactions of this nature, students are able to make their requests recognizable as requests in part because of their visible incumbency of the category 'student' within the {student/professor} SRP. At the same time, this visible category incumbency is in part achieved through their performance of the activity 'making a request for lecture notes' which is category-bound to 'students'. Therefore, the accomplishment of accountable action—one of the most basic requirements of IC—comes about through the intricate and reflexive interplay between both sequential and categorial methods.

Another prominent topic in existing IC research is the organization of turn-taking, and in particular, the production of responsive turns (see Carrol 2004; Cekaite 2007; Gardner 2007; Watanabe 2017 for teaching and learning, and Youn 2015; Ikeda 2021; Lam et al. 2023 for testing). As is the case with action formation, MCA also has the potential to contribute to a better understanding of how turn-taking can best be understood as part of the IC construct. As Silverman (1998) argues, there is a specifically categorial element to the operation of conditional relevance. That is to say, it is not the case that, on the completion of some first pair part, participants are merely accountable for producing a fitted response in a timely manner at an appropriate sequential juncture. Rather, they are simultaneously accountable for producing this response in such a way that it is visibly aligned with their locally relevant category incumbency (-ies). To again take an example of the kinds of classroom interactions that have been widely studied in the IC tradition (Hall 1995; Cekaite 2007; Hellermann 2009), when a teacher asks a student a question, simply providing an answer is not sufficient to display IC. Rather, the answer has to be designed in such a way as to make a display of its being the kind of answer that is appropriate for a student (and not for a colleague, headmaster, or parent etc.). An ability for turn-taking as a constituent part of IC depends not only on the ability to fit responses to prior turns and to produce these responses at appropriate points in the temporal flow of real-time interaction, but also on the ability to fit these responses to the locally relevant and ever re-emerging identities of the various people who are participating in an interaction.

A third foundational aspect of IC, which underpins speakers' competence to initiate and respond to actions, is their ability to orient to the normative, interactional, and inherent moral

order of human sociality (Wagner et al. 2018). Ethnomethodological research into the morality of interaction investigates how speakers treat local interactional conduct as orderly and accountable, and how the social agreements that sustain this orderliness are often 'seen but unnoticed' (Garfinkel 1964: 225). Breaches of the moral order can have dire consequences, be considered 'moral transgressions' and 'subject to some form of reprimand' (Hazel and Mortensen 2017: 3). Thus, there are moments in interaction when moral matters become a visibly oriented-to issue, when participants' moral standings are placed in jeopardy, and when the moral order itself is called into question. The ability to manage contingent moral matters, or in some cases to engender moral matters to achieve one's interactional agenda, is therefore a crucial facet of the IC construct. Existing IC scholarship has investigated the moral order of interaction in both language learning and testing contexts, with CA as the primary analytic approach and MCA employed in tandem to varying degrees (Hazel and Mortensen 2017; Burch and Kley 2020; Burch and Kasper 2021; Sandlund and Sundqvist 2021). However, possibly due to the dominance of CA and its sequential concerns in the IC tradition, such studies have tended to touch on morality in passing rather than topicalizing it as a significant aspect of competence (see exceptions in Roever and Dai 2021; Dai 2022, *in press a*; Tai and Dai 2023). Here, we contend that IC research can benefit from a more explicit focus on the concurrent categorial nature of moral order since 'moral work can be done through the selection of categories' (Bergmann 1998: 287 and see also Jayyusi 1984). Indeed, the thorough interdependence between category work and moral order (Jayyusi 1984; Evans and Fitzgerald 2016) suggests MCA as a uniquely promising method for further unpacking the moral dimension of IC.

At its heart, IC scholarship is concerned with understanding the methods, resources and practices that speakers deploy in interaction to produce orderly, mutually meaningful conduct and accomplish intersubjectivity (Burch and Kley 2020). However much of the time, the successful deployment of these methods relies on the concurrent and interlaced operation of both sequential and categorial work. Categorial considerations then, are built into the very fabric of what IC is and the questions that IC research seeks to answer. This has very direct and practical ramifications for the teaching and testing of the IC construct. Building IC tests that achieve fuller construct coverage depends on accounting for the categorial dimension of competence, and similarly, efforts to develop methodologies for teaching IC cannot afford to ignore this part of the construct.

In this study, we proceed from this starting point to give an empirical demonstration of how MCA can be fruitfully applied to an analysis of how a number of participants show their IC in local instances of practical language use. Through the analytic power of MCA, we demonstrate that what are essential constituents of the definition of IC—making social actions recognizable, responding to co-participants' previous actions, and maintaining the moral order of interaction—are concurrently sequential and categorial.

Context of this study

The interactional task

The data examined in this study come from a larger project that investigates the assessment of IC in the online space (Dai 2022, *in press a*). Drawing on a task-based needs analysis (Dai 2023a), Dai developed an IC test comprising nine roleplay tasks to evaluate how Chinese speakers interact in a range of social scenarios. This study uses data collected for one of the tasks in which participants are required to take on the social role of an employee in a company where Chinese is the language of communication. In this scenario, the participant/employee has noticed that their colleague, Tang Li, who is at the same level of seniority in the company as them, is always able to get her leave approved from their manager Li Jia, whether for study, leisure, or medical reasons. This has resulted in the participant often having to work overtime to cover for Tang Li. When the participant asked for leave last week to go on a vacation with their partner, their request was refused by Li Jia, the manager. The participant perceives workplace unfairness and

decides to have a video chat with Li Jia to talk it through as Li Jia is currently working from home. The task for the participants is therefore to have a live video-chat with Li Jia, who was roleplayed by a first language (L1)-Chinese female in her fifties with extensive managerial experience in real life. The scenario was delivered to participants in a video format with key phrases in both English and Chinese included in the prompt video to accommodate participants with lower proficiency in Chinese. The interlocutor roleplaying Li Jia received a prompt in terms of the context and how she would approach the interaction with the participants. [Supplementary Materials](#) include still images from the video prompt shown to participants, the English translation of the Chinese voiceover that accompanies the video, and the training prompt for the interlocutor. Interested readers can refer to Dai (2022, [in press a](#)) for further details of the other roleplay tasks and how the tasks were used for IC assessment.

The use of roleplay for data collection has implications for the interpretation of the findings from this study. Roleplay creates an interactional scenario that allows participants to take on specific identity categories within a pre-established context (Crookall and Saunders 1989). Frequently used in professional communication training (e.g. see Atkins 2019 for clinical communication for clinical communication), roleplay allows participants to practise interaction and researchers to observe interaction in situations where authentic, naturalistic data are difficult to elicit (Kasper and Youn 2018). The set-up of the roleplay task in this study followed established practices in previous IC research where researchers described the interactional context for both the participants and the interlocutor prior to the roleplay taking place (see Appendix B in Youn 2013 and Appendices B–D in Ikeda 2017 for comparable research designs).

Using roleplay to observe IC requires a balancing act between standardization and authenticity: on one hand Dai (2022) needed all participants to have a similar understanding of what happened in the workplace and why they might feel the need to lodge a complaint to their manager so that we as researchers could compare their handlings of the situation. On the other hand, Dai (2022) could not prescribe their interaction too strictly to the point that the interaction became a script and the participants no longer needed to draw on their members' knowledge and practical reasoning. The same principles applied to the training of the interlocutor since Dai (2022) needed to ensure that the interlocutor had a consistent understanding of the rationale of why they decided to grant leave in one situation but not another. However, at the same time, Dai wanted the interlocutor to be able to respond to natural contingencies in the interaction from the participants. Therefore when readers refer to the prompts in the [supplementary materials](#) they can see that Dai only sketched the general interactional context and rationale for both parties while leaving the rest to participants' and interlocutor's local reasoning. This design allowed us to use the ethnomethodological lens (CA and MCA) to analyse interaction from an emic/participant-relevant perspective, as both the participants and the interlocutor still had room to draw on their members' knowledge to contingently interact with one another.

Participants and data

One hundred and five participants—90 L2 Chinese speakers and 15 L1 Chinese speakers—took part in this workplace roleplay scenario (Dai 2022, [in press a](#)). Their roleplay interactions were audio recorded and transcribed, totalling 331 minutes 15 seconds. After going through the recorded performances, we selected recordings from 22 speakers—11 L2 speakers and 11 L1 speakers—to build a dataset for MCA analysis. We purposely chose speakers varying on background variables such as language status (L1 vs L2), proficiency level (HSK⁴), age, length of residence (LoR) in the target community and length of work experience (LoW) in the target community. The rationale is based on existing empirical IC research that indicates that language proficiency and degree of socialization in the target culture and/or institutional setting are the two main factors that best predict a speaker's IC (see the previous 'Interactional Competence' section). Due to the paucity of studies that have used MCA to investigate IC from a developmental perspective, we decided to maximize variation in speaker profiles in our dataset so as to capture as diverse a range of categorial methods as possible. This sampling technique also allowed us to formulate tentative observations as to how speakers' categorial methods

develop compared to the development of their sequential methods, which existing IC scholarship has linked primarily to proficiency and degree of socialization. [Supplementary Materials](#) provide detailed information on each participant's profile. Background information for each focal participant in the Analysis section is also provided to assist readers with contextualizing participants' performances, although such background information was not treated as of *a priori* relevance in our analysis, following the MCA analytic protocol.

Method of analysis and research questions

The MCA analysis in this study adopts the procedures laid out in [Stokoe \(2012\)](#). The two authors first separately went through the 22 recordings, focusing broadly on how participants employed categorial resources. As we did not have *a priori* interest in any specific categorial behaviour, our initial noticing of categorial patterns in the data was unmotivated ([Stokoe 2012](#)). While examining data, we paid attention to participants' mentioning of categories (e.g. manager, colleague), SRPs (e.g. {employee/manager}, {colleague/colleague}), category-resonant descriptions (e.g. the manager describing an employee as *jinjinjijiao* 'nitpicky'), and MCDs (e.g. [workplace], [family]). In this process, we noted the sequential environments where such categorial mentioning occurred, followed by a preliminary analysis of what interactional functions participants used these categorial resources to perform. This follows the *sequential-categorial analysis* approach, a term coined in Dai ([2022, in press a, b](#)) to describe an analytic process that employs CA and MCA in tandem to analyse interaction. After initial individual unmotivated looking, the two authors met regularly, and through repeated, iterative analysis and discussion, we identified a list of candidate phenomena where participants in our dataset employed categorial methods that are indicative of their IC. In this article, we present three focal phenomena and their accompanying categorial methods with respect to how participants:

- 1) make a complaining action recognizable to their interlocutor
- 2) resist the interlocutor's categorization of the speaker as an employee who is *jinjinjijiao* 'nitpicky'
- 3) create a moral puzzle that implicates the interlocutor in order to further their interactional agendas

The reason we focused on these three phenomena is that they are local, context-specific instantiations of the three broader focal considerations in existing IC scholarship, as reviewed in the 'What does MCA have to offer to IC' section, pertaining to how speakers:

- 1 make social actions recognizable
- 2 respond to an interlocutor's social action
- 3 orient to the moral order of interaction

Our analysis aims to demonstrate how MCA can uncover the categorial resources that speakers employ to achieve these three fundamental constituents of IC, which so far have largely only been investigated using sequential CA.

Analysis

Performing social actions: how the recognizability of 'complaining' is achieved

The goal of this first section is to begin to pick apart how it is that making interactional displays of category membership contributes to speakers' ability to produce conduct that is recognizable as performing some particular action or another. One specific categorial method our analysis has revealed is that participants drew on different SRPs within a single MCD to make an action recognizable. More specifically, we look at one of our participant's recruitment of, and appeals to, categories within the [workplace] MCD and investigate how this allows them to accomplish

the action of 'complaining'. In the following three-tier transcripts, the first tier is the Chinese Romanized Pinyin transcription following CA conventions, the second tier the grammar gloss, and the third tier the idiomatic translation.

Excerpt 1 shows the initial stages of Bob's (L2 Chinese, L1 German, HSK6, Age: 20–25 years, LoR: 1–3 years, LoW: <1 year) roleplay. INT is an abbreviation for interlocutor in the transcripts.

Excerpt 1: Bob 0:00 - 0:15

- 01 ((Voicecall alert))
- 02 (4.1)
- 03 BOB: Oh: †a jingli:: jingli hao. Hh
oh manager manager good
'Oh, manager, hello manager.'
- 04 INT: A nihao, eh. (0.4) Mng
ah hello
'Hello.'
- 05 BOB: A:: a wo we:n- wo xiang gen ni tan yi jian shi:.
ah I ask I want with you discuss one CLS thing
'I as- I have something I'd like to discuss with you.'
- 06 INT: =N[g]

In Excerpt 1, Bob begins the roleplay by greeting Li Jia in line 3, producing the category term *jingli* 'manager' twice over the course of this short utterance.⁵ In this way, Bob foregrounds the institutional relationship between the two speakers from the earliest point in the interaction, establishing not only that Li Jia is a manager, but also, she is specifically *his* manager and he is her employee. In other words, Bob invokes the relevance of a particular SRP within the MCD [workplace] here, namely, that of {manager/employee}. By virtue of this, the assemblage of rights and responsibilities that managers and employees have with regard to each other (Jayyusi 1984; Stokoe 2012) is made available as part of the social/interactional context against which the pursuant talk is to be understood.

Excerpt 2: Bob 0:15 - 1:06

- 07 BOB: [J]iu shi: a:: wo shangci qingji:a de shi:,
just be ah I last time ask holiday NOM thing
'It's about last time when I asked for time off.'
- 08 INT: °M°
- 09 (0.4)
- 10 BOB: Ts .hh a:: nin shuo:: (.) wo zheg#e::# (0.4)
ts ah you say I this
'You said my'
- 11 a:::m jiu shi: (0.3) yinwei: (.) gongzuo
um just be because work
'um because there was so much work to do,'
- 12 tai duo: >suoyi mei banfa< qing jia:.
too much so NEG way ask holiday
'therefore I couldn't get time off.'
- 13 INT: M dui:de.
right
'That's right.'

- 14 (1.1)
- 15 BOB: A::: (1.3) TSk (0.4) wo xia:ng (1.3) women zhe:ge:: (1.0)
 ah I think we this
 'I want- our'
- 16 Tang Li tongshi a .hh ta: >wo jingchang dei wancheng tade<
 Tang Li colleague she I often must complete her
 'colleague Tang Li, she- I often have to finish her'
- 17 gongzuo:.
 work
 'work.'
- 18 (0.5)
- 19 BOB: Zheyang jia ban.
 like this add work.
 'And do overtime.'
- 20 (0.3)
- 21 BOB: >Youshihou< jia dao: jiaban dao:: lingchen sandia:n
 sometimes add until add work until early morning three o'clock
 'Sometimes I have to, I have to work until 3 am'
- 22 cai neng wancheng gongzuo. .hh Er ta chang bu: lai:.
 just possible finish work. and she often NEG come
 'before I can finish everything. And she often doesn't show up.'
- 23 T[s] Na xianzai:: >zhongyu xiang °yao°< fang (.) jia
 ts well now finally think have take holiday
 'Now I finally want to take a holiday,'
- 24 INT: [°M°]
- 25 BOB: xiang yao gen wo nvpengyou chuqu lvyou:: DAn ye (.) mei you
 want with I girlfriend go out travel but also NEG have
 'want to go on a trip with my girlfriend, but I still'
- 26 BAnfa: yinwei: (0.4) hai shi dei: (.) wancheng ta:de
 way because still be must complete her
 'can't because I still have to do her work for her.'
- 27 gongzuo.
 work
- 28 (0.7)
- 29 BOB: Err:: na wo xiang wen (1.0) wen yixia jing#li: nin#
 er well I want ask ask a little manager you
 'I want to ask, ask you manager,'
- 30 JUEde: ZHeyang: (0.3) gongping ma.
 think like this fair Q
 'do you think this is fair?'

As the conversation continues in Excerpt 2, Bob launches into a description of events from his and Li Jia's shared interactional history. In lines 7 and 10–12 he recounts a time when he asked Li Jia for time off and she refused this request on the basis that work was too busy. To this point, Bob's description of this historical event contains no suggestion of any violation of the normative mutual responsibilities that link incumbents of various categories within the MCD [workplace].

However, in lines 15–19, 21–23 and 25–27, Bob switches to a description of historical events that are marked by just such a violation. In this stretch of talk, Bob works to establish a gulf between the way his colleague Tang Li has been behaving and a number of normative expectations around how colleagues ought to treat each other. It is important to stress here that we as analysts are not treating social norms (in this case, norms around how colleagues ought to treat each other at work) as *explanations* for Bob's conduct here. Rather we are interested in asking how such norms are used as resources for designing talk in such a way as to make it hearable in a particular way. Evidence for the local relevance of certain norms is not to be derived from an analyst's knowledge of the social world, but instead, by inspecting how Bob (in this case) formulates his description of what has been happening in his life and what he accomplishes through this formulation. We argue that the recognizability of Bob's talk between lines 15 and 27 as a complaint is achieved in large part through the way it is designed to index norms around sanctionable workplace behaviour.

In line 15, after the false start *wo xiang* 'I want...' and a self-initiated self-repair, Bob launches a turn constructional unit (TCU) that begins with the noun phrase *women zhege Tang Li tongshi* 'our colleague Tang Li', foreshadowing that the projected clausal TCU completion is likely to comprise some comment on Tang Li's behaviour. Note here that using Tang Li's name alone would have been sufficient for Li Jia to recognize the individual in question. Bob, however, designs this utterance in such a way as to foreground Tang Li's membership of the category 'colleague' and in so doing, invokes the relevance of a second SRP, namely {colleague/colleague}. He then completes this TCU in lines 16 and 17 by declaring 'I often have to finish her work'. This same accusation is repeated later in lines 26 and 27, this time being nominated as an account for why Bob cannot get away for the vacation he is implying that he is owed. Further to this, in lines 21–22 Bob claims that he often has to stay up until 3 am before he can finish his work, while in a separate TCU he states that Tang Li 'often doesn't show up'. Viewed superficially, this collection of utterances might be seen as a mere description of historical events. In this interactional context, however, it achieves a hearing as a complaint in large part because of the disconnect between Tang Li's reported behaviour and the normative mutual responsibilities packaged in the {colleague/colleague} SRP. Tang Li's conduct, namely, relying on her colleagues to do her work for her, not showing up to the office, and jeopardizing her colleagues' vacation opportunities, is hearably irresponsible and, by virtue of socially shared expectations regarding colleagues' responsibilities to one another, is presented as something that Bob can legitimately complain about.

However, looking at Bob's turn in lines 29 and 30, it becomes clear that his talk here is not just hearable as constituting a complaint about Tang Li, but could potentially also be heard as a complaint against his manager Li Jia. Bob begins line 29 with *Err na wo xiang wen* 'Err I want to ask', projecting a complement clause TCU completion featuring a specific question. However, at this point, Bob interrupts the progressivity of his turn noticeably, firstly producing a 1-second pause before inserting the category term 'ask you manager', and only then finally producing the projected turn completion with 'do you think this is fair?'. The insertion of this category term reactivates the relevance of the {manager/employee} SRP and Bob's explicit reference to fairness is potentially interpretable as a tacit accusation that Li Jia has failed to uphold one of the responsibilities we normatively hold managers accountable to, namely, the duty to ensure that they preside over a fair workplace and do not indulge in favouritism.

Thus, we see the concurrent operation of two SRPs within the MCD [workplace], namely, {manager/employee} and {colleague/colleague}. Both of these SRPs relate the incumbents of certain categories together according to some locally specified distribution of mutual rights and responsibilities (Jayyusi 1984). By designing his talk in such a way as to alternately highlight these SRPs, Bob is able to not only produce conduct that is recognizable as constituting a 'complaint', but also to register the act of complaining as *reasonable* and *legitimate*

(as distinct from merely ‘whining’). This analysis demonstrates that making a social action recognizable—complaining in this case—is not just a sequential endeavour. Bob prefaced his complaint proper in lines 29–30 with preliminaries spanning from lines 3 to 27, conforming to findings in Al-Gahtani and Roeveer (2012) where the authors noted that advanced L2 speakers employ elaborate preliminaries to make a dispreferred action recognizable to their interlocutor. However, through MCA here we have brought to light the synchronous categorial work Bob is doing: alternately making relevant different SRPs within a single MCD. The ability to employ this particular categorial method to initiate social actions is just as crucial a constituent of IC as the sequential methods we usually see being studied in IC research. Whilst Bob’s performance was selected for analysis here due to its very clear demonstration of the links between categorial work and action formation/ascription (Levinson 2013), this method was found throughout the dataset and was employed by both L2 and L1 speakers of varying proficiency levels and degrees of socialization. Most noticeably, even speakers with little work experience in the target community, such as Bob, are able to employ this method.

Responding to social actions: how a category-resonant criticism can be resisted

Having just looked at the categorial method Bob deploys that allows him to ‘do complaining’, we now turn our attention to the question of what categorial methods speakers can utilize in the work of responding to a co-participant’s just-completed social action. The method our MCA has revealed is the negotiation of the associations between categories and their predicates. More specifically, for this dataset we examine how speakers use this categorial method to resist a category-resonant criticism⁶, and in so doing, demonstrate their IC. The instances of criticism analysed here revolve around the interlocutor’s use of a particular Chinese idiomatic expression, *jinyinjijiao*. Translatable as something like nitpicky, excessively fastidious, or petty, the adjectival expression describes a person who is unreasonably focused on ensuring fairness in every tiny detail⁷. Excerpt 3 shows an example of this playing out in one of the roleplays:

Excerpt 3: Mel 1:25 – 1:31

- 01 INT: Umm:: tongshi zhiJia:n huxiang bangzhu: ma.=Ye bu yao
um colleague between each other help Q. also NEG want
 ‘Colleagues should help each other out right? And not’
- 02 jinyinjijiao. A:
nitpicky. PRT
 ‘be nitpicky.’

Line 1 is delivered here in response to a long turn from the L1 Chinese participant, Mel (L1 Chinese, Age: 26–30 years, LoR: 26–30 years, LoW: >3 years), in which she complains that Tang Li often fails to get her work done and, as a result, Mel has to do it for her. As we saw in the previous section, the recognizability of the manager’s utterance here as a criticism or admonition is in part derivable from the way in which it is designed to reference known-in-common expectations around how the incumbents of certain categories *ought* to properly behave. Again, the manager explicitly mentions the category term *tongshi* ‘colleague’ in line 1 and links this to the category-bound activity ‘help each other out’. The next TCU, ‘And not be nitpicky’ recasts Mel’s having to do Tang Li’s work for her as something Mel should not be complaining about. That is to say, the manager frames ‘helping a colleague out’ with work as something that good colleagues do as a matter of course, and claims furthermore, that complaining about this constitutes deviant behaviour. To complain about a non-complainable is evidence of being *jinyinjijiao*—a nitpicker. As we saw in the previous section with Bob, the manager here evokes the SRP {colleague/colleague} and in so doing, makes Mel accountable for defending her own behaviour in complaining about Tang Li.

Excerpt 4: Mel 1:31 - 1:58

- 03 (1.0)
- 04 MEL: Nn: †NA na wo shi a:.=W- wo GA:n huo deshihou
nn well well I be PRT. I do work time
 'Well, well I'm not being nitpicky at work. When I'm working I'
- 05 wo dou shi mei you (.) mei you baoyuan.<†DA:nshi
I all be NEG have NEG have complain. but
 'have never complained. But because you didn't approve'
- 06 yinwei ni:n mei you†† pi wode jia wo zhende shi††
because you NEG have approve my holiday I really be
 'my leave I'm just'
- 07 (.) jiu shi hao †SHAngxin A?
just very sad PRT
 'feeling really sad.'
- 08 INT: Ah:: yinwei ni: meiyou PI: ni jia ye
ah because you no approve you holiday also
 'Ah because you- my not approving your leave was just about'
- 09 shi juti de gongzuo: anpai::, Dique ni: >ruguo neitian
be specific PRT work plan indeed you if that day
 'the specific arrangement at work. Indeed, if you had taken'
- 10 qingjia< Tang Li yali jiu hui hen Da: hh.
ask holiday Tang Li pressure then will very big
 that day off it would have put Tang Li under a lot of pressure.
- 11 (1.0)
- 12 MEL: °K° ke shi (.) wo jiu yinWEi: neitian nin
b- but I just because that day you
 'B-, but, just because you didn't approve my leave that day'
- 13 meiyou pi wode Jia: wo dou gen wo: (.) jiushi
NEG have approve I ASSC holiday I all with I just
 'I had a fight with my partner.'
- 14 duiXIa:ng chao††JIA le.††† CHA ((falsetto)) dian jiu
partner quarrel ASP almost then have
 'We nearly broke up. That'
- 15 nao fenshou le. =W- zhe dui wo (.) yali
break up ASP. I- this towards I pressure
 'has also put me under a lot of'
- 16 ye hen DA: ya.
also very big PRT
 'pressure.'

Excerpt 4, following directly from Excerpt 3, shows how Mel responds to this admonishment and addresses the tacit claim that her behaviour in complaining about Tang Li has been found (by her manager) to be improper and potential evidence of her being a 'nitpicky colleague'. Just as was the case with Bob, here Mel displays her IC by deploying both sequential and categorical methods. Note, for example, how Mel's initial reply to her manager accomplishes hearable responsiveness through the use of a number of delaying devices (lines 3 and 4) that project an imminent dispreferred response (Pekarek Doehler and Pochon-Berger 2011; Al-Gahtani and Roever 2018). Important as this sequential work is however, a full description of Mel's IC needs to extend further to encompass the categorical method Mel employs concurrently: reconfiguring the associations between the category 'nitpicky colleague' and its bound activity *complaining at work*.

After a 1-sec gap in line 3 in Excerpt 4, Mel begins her turn in line 4 with two TCUs, both of which make claims about the type of person, and the type of colleague, she is. She begins by declaring, 'Well, well I'm not being nitpicky at work' and follows up with, 'When I'm working, I have never complained'. This makes implicit reference to the newly relevant category formulation 'nitpicky colleagues', links a particular activity (*complaining at work*) to this category, and explicitly rejects Li Jia's move to position Mel as an incumbent of this category. Mel's local reasoning here is based on the assertion that she cannot be properly categorized as a 'nitpicky colleague' because she has never indulged in a particular activity (*complaining at work*) bound to this category. This, however, presents her with something of a problem as her claim to 'have never complained' is placed in some jeopardy by the fact that she has, indeed, just been complaining about Tang Li's behaviour. Mel addresses this in lines 5–7 and 12–16, in which she states that Li Jia's refusal to grant her leave has made her 'really sad' and that it almost caused her and her partner to break up. In this way, Mel reconfigures the association of the category 'nitpicky colleagues' with the various activities to which it is bound. She frames the kind of complaining she has just been doing as reasonable, legitimate, and justified, and therefore, a *different type of complaining* to that which might be properly associated with the category 'nitpicky colleague'. It is no longer the case, according to Mel's locally occasioned, *in situ* reasoning, that anyone who complains can be classified as a 'nitpicky colleague'. Rather, it is only certain types of complaining that are properly imputable in this way and because she has not been complaining 'frivolously', she cannot be characterized as *jinjinjijiao*.

What we see here from Mel is an on-the-fly and interactionally occasioned negotiation of how the category implicative description 'being *jinjinjijiao*' might properly be understood to associate with various predicates and attributes (Housley and Fitzgerald 2015). Her IC is demonstrated by the flexibility she displays in being able to frame her own complaining as something other than the type of complaining that could appropriately be taken as evidence of being *jinjinjijiao*. Interestingly, none of the L2 speakers in this study (regardless of their proficiency or degree of socialization) showed the ability to resist their manager's rebuke in this way. The majority either simply ignored or chose not to problematize it. Others, as we see in Excerpt 5 from the advanced-proficiency L2 Chinese speaker Sid (L1 British English, L2 Chinese, HSK 6, Age: 26–30 years, LoR: 10–15 years, LoW: >3years), seemed to accept the criticism, or at least, made no efforts to resist it.

Excerpt 5: Sid 1:45 – 2:27

- 01 INT: Name ni si: bang Li Jia* zuo le yidian shi:.
so you be help Li Jia do ASP some things
'Actually you have helped Li Jia with some work.'
- 02 Na:[: >dan shi<] wo jue:de .hhh tongshi zhijia:n ma: (.)=
well but I think colleague between Q
'But I think between colleagues,'
- 03 SID: [(A jingli)]
ah manager
'Ah manager'
- 04 INT: =ye buyao name [jinjin]ji:jiao.
also NEG want so nitpicky
'we shouldn't be so nitpicky.'
- 05 SID: [Ng:]
Ng
- 06 (0.4)
- 07 INT: A?
PRT
'Ah'

- 08 SID: Oh:: [a::] Ye shi ye shi [bu]guo ne: wo zheshi .hhh=
oh also be also be but PRT I this
 'Oh, right, right, if I'm just'
- 09 INT: [°hh°] [Mm]
- 10 SID: =err: er: a na keneng jiushi wo: qing zhebia:n er:
er er ah well possibly just I ask this side er
 'Um it might be that when I asked'
- 11 zhebian qi:ngji:a keneng jiushi .hh meiyou gou
this side ask holiday possibly just NEG have enough
 'for time off this time, it might have been a bit late. Also'
- 12 ji:shi:.=Ye meiyou tiz- er jiushi meiyou TI:qia:n (.)
prompt. also NEG have ea- er just NEG have early
 'perhaps it wasn't ear- I didn't apply far enough in advance.'
- 13 hen jiu qingjia. =Jiushi keneng jiushi .hh dao_{zhi}
very long ask holiday. just possibly just cause
 'Maybe that's why it wasn't'
- 14 wo zhe: ci: Qi:ngJI:a:: mei you qingj- er: qing dao ji:a
I this time ask holiday NEG have ask ho- ask get holiday
 'approved this time.'
- 15 °Fanzheng°jiushi .hhh XI[WA]ng XIA:ci er:: wo jiushi
anyway just hope next time I just
 'Anyway, I just hope next time, I'll'
- 16 INT: [°M°]
- 17 SID: (0.4) wo Hui: zao yi:dian qingjia: ranhou ne er::
I will early a bit ask holiday then PRT er
 'get my application in earlier'
- 18 (0.4)jiushi (.)xiwang (0.5) ye y- YOu keneng ke:yi
just hope also have possibility can
 'and I hope maybe it can be'
- 19 bei PI:zhun ne jiushi zhe [ci]. Er er
BEI approve PRT just this time. er er
 'approved this time.'
- 20 INT: [Mm]

*Here the trained interlocutor mistakenly uses her own fictional name instead of Tang Li.

Here, in lines 2 and 4, the manager delivers the category-resonant admonition 'but I think between colleagues, we shouldn't be so nitpicky'. However, Sid reacts quite differently to Mel. He does appear to show some orientation to the accusation of being *jinjinjijiao*, as his normally quite fluent L2 delivery breaks down noticeably in lines 8 and 10. The onset of his utterance here is delayed by the turn-initial change-of-state token 'oh': and another elongated hesitation marker 'a:'. He then seemingly agrees with Li Jia by producing 'Ye shi ye shi' 'Right right'. However, Sid then produces a false start as the conditional clause beginning 'If I'm just' is abandoned and followed by a loud inbreath. He recovers his fluency somewhat after line 10 and goes on, in lines 11–15 and 17–19, to accept responsibility for his leave application having been rejected, noting that he ought to have submitted it earlier. We see here none of the practical and public reasoning deployed by Mel as she sought to establish the reasonableness of her conduct and resist her putative categorization as a 'nitpicky colleague', which constitutes evidence of strong IC on the categorial dimension (Dai 2022).

Orienting to the moral order of interaction: how a moral dilemma is created to further one's agenda

The third phenomenon identified is how participants orient to the moral order of interaction to create a moral dilemma for their co-participant in order to further their agenda. The categorial methods we have uncovered through MCA are 1) making relevant different MCDs and 2) evoking competing categories. In the task scenario prompt to the participants, they were informed that they had planned a trip with their partner although the partner category was not topicalized. L1 Chinese speakers, irrespective of their age, length of residence or work experience in China, frequently evoked the MCD [family] and their category as a 'partner' to present a categorial conflict between their incumbencies in the 'partner' category in the [family] MCD and their 'employee' category in the [workplace] MCD. The 11 L2 Chinese speakers on the other hand, mostly only referenced the information about their partner in formulating their complaint sequence to the manager without bringing the [family] MCD and their partner category into relevance. This forms a sharp contrast to L1 speakers, as many of the L2 speakers had high degrees of socialization in China both in terms of residence and work experience (> 10 years), while many of the L1 speakers who employed this categorial method had no experience working in China. The only exception was Hay, an advanced-proficiency L2 speaker with little residence and no work experience in China (L1 Australian English, L2 Chinese, HSK5, Age: 20–25 years, LoR: 0.5–1 year, LoW: 0). He went one step further in referencing his boyfriend identity.

Excerpt 6: Hay 0:19 – 0:46

- 01 Hay Qishi:↑ >wo yijin jiaban le
actually I already work overtime PFV
 'actually I have already worked overtime'
- 02 henduo:< henduo ci.
many many times
 'many many times'
- 03 (0.4)
- 04 Ranhou: wo qishi henxiang gen wode lianren qu lvyou
and I actually really want with my partner go travel
 'and I actually really wanted to travel with my partner'
- 05 jiushi women yiji:n (0.3) a: tanle (.) chabuduo liangnian
just we already talk almost two years
 'it's just we had already talked for almost two years'
- 06 jiushi: (.) er xiang le yaoqu e ZHeci lvyou,
just think PFV go this trip
 'just about going on this trip'
- 07 Ranhou >women xianzai yijing cuoguo le zhege jiHui.<
and we now already miss PFV this opportunity
 'and now we have already missed out on this opportunity'
- 08 E: ranhou women zai: xiang yixia ruguo: (0.3) e: (0.5)
and we DUR think a bit if
 'and we are now thinking if'
- 09 women yiHou: xiangqu lvyou de hua: (0.4)
we in the future want to travel NOM possibility
 'we would like to travel again in the future'
- 10 A: ni juede ni hui: yu:nxu ma.
PRT You think you will permit PRT
 'do you think you will allow it?'

In Excerpt 6, Hay starts by explaining how he has been frequently working overtime but when he moves on to talk about the failed travel plan, he elaborates on the plan being something he and his partner had planned for almost two years. If we focus solely on the sequential work Hay is doing

- 11 >Gen wo nvpengyou jiu bijiao< weinan ma yinwei
with my girlfriend just a bit difficult PRT because
'I'm in a difficult situation with my girlfriend because'
- 12 Ta jiu [jiu] bu kaixinhhh. (0.7)
she just just not happy
'she is just, just unhappy'
- 13 INT [°hm°]
PRT
'hmm'
- 14 HEN Suoyi: (0.8) °suoyi° wo ye buZHidao
therefore therefore I also not know
'therefore, therefore I also don't know'
- 15 zenme huida ta: bijiao hao.
how answer her relatively good
'how to best respond to her'
- 16 (1.7)
- 17 INT Hmm::=
PRT
'Hmm'
- 18 HEN =ai >ni ni nizenme< ni zenme ka:n,
PRT you you how you you how see
'so, hm, hm, how do you, how do you see this?'

Prior to line 1 in Excerpt 7, Henry asked Li Jia how much notice is required to take leave so that he can plan a successful trip in the future. Li Jia positions the discussion of taking time off within the [workplace] MCD in line 2 and orients to Henry's employee category: whether Henry is able to have his leave granted is a workplace matter and is contingent on the workload at the time of the leave-taking request. After a minimal gap in line 3, Li Jia issues an agreement-bid *haoba* 'OK' in line 4.

Li Jia's agreement-seeking attempt is, however, met with a change-of-state token in line 6 and a dispreferred response from Henry, evidenced by the pause in line 9 and false start in line 10. If we only use CA to analyse Henry's IC here in sequential terms, we see how he competently opens a non-minimal post expansion (Schegloff 2007b) from lines 10–18. However once we employ MCA in tandem with CA, we see important categorial work happening simultaneously, starting from line 11 when Henry evokes the MCD [family] by making the 'girlfriend' category relevant. Through mentioning his girlfriend, Henry invokes the relevance of an SRP {girlfriend/boyfriend}, categorizing himself as a 'boyfriend' on top of an 'employee'. The introduction of the [family] MCD and the boyfriend category is 'a serious use' (Jayyusi 1984: 136) by Henry as they are not referentially necessary, given that the manager has already framed the discussion of taking leave in the [workplace] MCD and categorized Henry as an employee. By re-categorizing and identifying himself as a boyfriend, Henry's talk from lines 10–12 is projective of an upcoming moral conflict between his employee and boyfriend categories.

After issuing a turn-holding conjunctive *yinwei* 'because' at the end of line 11, Henry provides an account of his dilemma in line 12: not being able to take time off is making his girlfriend unhappy. The plosive laughter at the end of line 12 is suggestive of Henry's uneasiness at describing his girlfriend's emotional state and at delving further into an account of domesticity, given that the frame of interaction was set in the workplace by the manager in lines 1–2. The alignment token *hm* in line 13 from Li Jia, however, indicates that Li Jia does not treat Henry's re-categorization as problematic, which prompts Henry to further pursue an account of how his workload allocation is causing strain on his personal relationship. Line 15 implies that Henry has a responsibility to address his girlfriend's displeasure and to provide an appropriate response to

her frustration at his inability to take leave. Henry's inability to do so, as made clear to Li Jia in line 15, is a morally assessable matter since this is a categorial responsibility bound to Henry's boyfriend identity. Note that this category-bound predicate is purposely made relevant and consequential by Henry to imply the moral impasse in this situation. It also necessitates Henry's providing an answer to his girlfriend, which reflexively co-determines (Schegloff 2007a) his identity as a boyfriend. The evocation of the [family] MCD, the re-categorization of himself as a boyfriend, and the explication of his boyfriend responsibilities, therefore, concurrently make recognizable the moral tension stemming from the workplace MCD and bleeding into the family MCD, for which Li Jia is responsible.

Li Jia's involvement in this moral impasse is furthered in line 18 by Henry. After a noticeable gap in line 16, Li Jia issues a hesitation marker but does not produce a turn. In the absence of any move to secure the next turn from Li Jia, Henry self-selects as the speaker for line 18, and after a few hurriedly-produced, nervous-sounding false starts, he invites Li Jia to make an assessment of his moral dilemma: 'How do you see this?' This dilemma is what Jayyusi (1984) termed 'an intelligible problem', as it is based on the 'simultaneous practical relevance of two, contextually oppositional, categorial incumbencies for a particular situation' (p.136). Henry and Li Jia are both placed in this moral dilemma due to Henry being an incumbent of both the employee and boyfriend categories. However, we need to remember that Henry's boyfriend incumbency is a locally occasioned categorial resource that Henry evokes to purposefully create this moral impasse for himself and, more so, for his manager.

The categorial method explicated above—making different MCDs and competing categories relevant—is employed by Henry throughout his interaction. In the ensuing transcript, Li Jia similarly admonishes Henry for being *jinyinjijiao* 'nitpicky' (see the analysis of previous phenomenon). Henry then proclaims that he is not too concerned about fairness in workload allocation. It is his girlfriend who is aggrieved by the fact that his rare leave request was rejected, despite his colleague Tang Li consistently having hers approved. Henry again shifts Li Jia's workplace MCD to a family MCD, bringing into focus the irreconcilable moral tension inherent in category competition (Jayyusi 1984). Although Li Jia the interlocutor was given some training in terms of how to respond to participants (see [Supplementary Materials](#)), from other fine-grained transcripts, which were not included here due to space restrictions, we notice that when participants created moral dilemmas, Li Jia indeed found it challenging to maintain her position, evidenced by her oftentimes nervous laughter and long pauses.

It is worth noting these particular categorial methods—shifting MCDs and creating competing categories—were consistently employed by L1 speakers, irrespective of their length of work experience in China. None of the 11 L2 speakers displayed the ability to do so, despite the fact that many of them have high proficiency in Chinese and/or have resided and worked in China for an extended period of time (see [Supplementary Materials](#) for participants profiles). The closest we observed was the one from Hay, who interestingly had a much shorter length of socialization compared to some other L2 speakers. The complex relationship between the categorial aspect of IC and speakers' background variables will be further explored in the next section.

Discussion and conclusion

Revisiting the question of why there is a need to employ MCA for IC research, in this article, we set out to demonstrate that a speaker's IC is their ability to concurrently mobilize sequential and categorial resources for successful interaction. To achieve this goal, we focused on three central considerations of a person's IC—action formation, responsive turn design, and moral order management—which thus far, have mostly been researched using sequential CA (see 'What does MCA have to offer IC?'). What has received less attention, however, are the categorial resources speakers contemporaneously deploy in interaction.

Categorial resources and practices are omnipresent at every point of interaction: while navigating their ways through interaction, whether initiating or responding to actions or attending

to the morality of interaction, speakers take into account their individual identities, those of their interlocutors, and the social role relationships between them and their interlocutors, all of which are constantly and reflexively shaping and being shaped by the context. Interaction is a delicate business, replete with ‘expectations and dispositions about our social worlds’ (Hall and Pekarek Doehler 2011: 1). When these expectations and dispositions are flouted, the moral order of interaction is placed in jeopardy. The organization of such social knowledge relies on speakers’ deployment of categorial resources *in* and *for* interaction, the explication of which requires the analytic procedure of MCA.

Approaching this dataset through unmotivated looking and employing the apparatus of MCA, we analysed how speakers’ categorial resources are systematically organized to achieve context-specific interactional goals. Table 1 summarizes the categorial members’ methods we have uncovered via MCA for the three focal phenomena. Throughout the analysis, we have demonstrated that the MCA apparatus—categories, predicates, SRPs, and MCDs—constitute an effective machinery to explicate the methods speakers employ to organize their categorial resources. The ability to deploy categorial resources *in* and *for* interaction, we argue, is foundational to the conceptualization and description of IC.

Table 1: The phenomena and corresponding methods identified in this study

Interactional phenomena	Categorial methods
Making one’s actions recognizable	Drawing on different SRPs and their predicates
Responding to a co-participant’s actions	Negotiating the association between categories and predicates
Orienting to the moral order of interaction.	Making relevant different MCDs and evoking competing categories

This study advances IC research in three directions. First, building on long-established calls for the combined use of CA and MCA in general ethnomethodological scholarship (Watson 1997; Silverman 1998; Kasper 2009; Stokoe 2012), we have advocated for a sequential-categorial approach to IC and L2 talk (see similar endeavours in Roever and Dai 2021; Dai 2022; Davey 2022; Tai and Dai 2023). Drawing on CA, and influenced by CA’s primary concern with sequence, existing IC studies have predominantly investigated speakers’ sequential behaviour such as preliminaries and sequence organization (Al-Gahtani and Roever 2012; Pekarek Doehler and Berger, 2018). While we fully acknowledge that members’ sequential methods are enormously important to their ability to interact, we argue that how speakers deploy categorial resources such as SRPs and MCDs is just as important as their mastery of sequential structures. Categorial resources represent speakers’ knowledge about their social world and the common-sense workings of the society where interaction takes place, instantiations of which include how categories are enacted, how particular predicates are associated with certain categories, how SRPs are established to make sense of social relationships, and how MCDs are evoked and shifted to achieve speakers’ interactional agendas. We hope that through our analysis of the three focal phenomena in this study we have demonstrated that speakers’ effective organization and deployment of categorial resources to achieve interactional goals is pivotal to a comprehensive account of their IC. Readers can refer to Dai (2023b, *in press a, b*) for a theorized IC model on how speakers marshal both sequential and categorial resources for effective interaction at the moral, logical and emotional levels.

Secondly, while topics such as identity, morality, and the categorial aspect of action formation and turn-taking have been well-researched for competent members (e.g. L1 speakers) in general ethnomethodological research, in this article, we have established their relevance to L2 speakers and IC scholarship. Although classic definitions of IC have long noted that the ability to interact

hinges on the use of members' methods to manage identities and social role relationships (e.g. [Hall and Pekarek Doehler 2011](#)), few IC studies have explicitly made observable how speakers at different proficiency levels and lengths of socialization construct identities, enact social roles, and negotiate terms of memberships. The analysis in this article demonstrates broad topics—such as identity and morality—are not interaction-external entities that speakers bring along with them. Instead, they are constructed on a moment-by-moment basis within each interaction in response to various contingencies ([Lam 2018](#); [Tai 2022](#)) to achieve context-specific interactional goals, for L1 and L2 speakers alike. On a turn-by-turn basis speakers become employees and boy-friends in interaction; they create moral puzzles for their interlocutors; and they recipient-design their actions based on the rights and responsibilities predicated on their interlocutors' ever-(re)emerging and collaboratively constructed social roles. The very recognizability of speakers' social actions therefore relies not only on the successful deployment of sequential methods, but also, on the skilful application of categorial methods. Attention to categorial methods and resources enables us to interrogate a fundamental question in IC research—how social actions are made recognizable *by* members and *for* members as vehicles for the display of individual identities, how people can design responsive turns to make a public display of their fittedness to the prior turn, and how the moral order of interaction is maintained collaboratively. Combining MCA with CA, IC researchers can now investigate how speakers at different levels of proficiency and degrees of socialization (i) develop their categorial methods, (ii) whether such methods can be taught in language classrooms, and (iii) if the ability to employ such methods can be assessed in IC tests.

Lastly, adopting the rigorous MCA procedure ([Schegloff 2007a](#); [Stokoe 2012](#)), we have demonstrated that members' methods in the use of categorial resources are systematic, robust, and empirically tractable, not only for L1 speakers (which have been well-researched in general MCA studies), but also for L2 speakers of varying proficiency and socialization, which are at the heart of the IC research program. The methods explicated in this study—shifting between SRPs, negotiating the association between predicates and categories, and making relevant different MCDs for recategorization—are neither wild nor promiscuous ([Fitzgerald 2012](#)). Instead, regardless of language backgrounds, lengths of residence, or proficiency levels, speakers in our dataset employ these methods for the moment-by-moment management of interaction in a disciplined, consistent, and orderly manner. With the growing interest in methodical applications of MCA to IC ([Sandlund and Sundqvist 2021](#); [Dai 2022](#); [Davey 2022](#)), we are optimistic that there will be more empirical IC studies using MCA to uncover systematic patterns in speakers' use of categorial resources as their proficiency levels develop and/or as their socialization in the target community increases.

This last point also suggests a most fruitful direction for future MCA-for-IC research: the relationship between categorial IC and speakers' background variables. As explained in 'Context of this Study', we purposefully built a dataset consisting of participants varying on background variables pertaining to language proficiency (HSK levels, L1 vs L2) and degrees of socialization in the target community (length of residence and work experience) since previous IC scholarship has shown that they are the main contributing factors to differing levels of IC. As this study is one of the first that looks at IC using MCA, we aimed to cast a wider net by increasing the heterogeneity of our participant profiles, compared to, for example, only sampling HSK4 participants who had lived in China for six months, which would have restricted the range and type of categorial methods we could observe.

Although this study was not designed to answer questions about the impact of background variables on categorial IC, it has given us a glimpse into the complex relationship between the two:

- 1 Why were most speakers able to use the categorial method SRP shifting in phenomenon one regardless of proficiency levels and degrees of socialization? Does this mean this method is a more *basic* one that speakers pick at an earlier stage of their language acquisition, compared to more *applied* methods that require explicit instruction or extensive exposure to the target community? ([Kecskes et al. 2018](#))

- 2 Why no L2 speakers (e.g. Sid) in phenomenon two, despite the fact that some of them possessed strong proficiency, high length of residence and rich work experience in the target community, used the categorial method that Mel and other L1 speakers employed to resist the *jinjinjijiao* categorization? Does this imply that negotiating the association between categories and predicates can be particularly challenging for L2 speakers in some contexts (e.g. professional workplace communication) and hence require dedicated teaching?
- 3 Why few L2 speakers employed the MCD shifting categorial method that was frequently employed by L1 speakers (e.g. Henry) in phenomena three, except for Hay? This is even more intriguing when we take into consideration that Hay is a near-advanced proficiency L2 speaker with little residence length and no work experience in China, compared to many L2 speakers in our dataset who have L1-like proficiency and much longer degrees of socialization in China. Does this again imply that some categorial methods require targeted teaching in the classroom as they are unlikely, or would require a substantial amount of exposure, to be picked up by L2 speakers in the wild?

These observations suggest a complex, non-linear relationship between the use of categorial methods and speakers' background variables, which does not seem to fully conform with findings in previous sequence-minded IC research where speakers employ more diversified and elaborate sequential practices as their proficiency and length of residence increase (see examples in [Al-Gahtani and Roever 2012](#); [Pekarek Doehler and Berger 2018](#)). We nevertheless caution against premature conclusions on these points as they are based on single-case analyses with limited generalizability. Further MCA-informed IC research can design studies to purposely investigate the impact of specific background variables on categorial IC. Researchers can collect longitudinal data to examine how L2 speakers' ability to use categorial methods develops as their degree of socialization increases, similar to what previous research has revealed about sequential IC (see [Pekarek-Doehler and Berger 2018](#) as an example). Researchers can also use cross-sectional data to investigate the relationship between categorial IC and general proficiency (see [Al-Gahtani and Roever 2012](#) for a sequential IC example). Answers to these questions have important implications for our understanding of how the categorial aspect of IC can be taught, learnt, and assessed.

Notes on contributors

David Wei Dai is Lecturer (equivalent tenure-track Assistant Professor) of Professional Communication at the International Centre for Intercultural Studies, UCL Institute of Education, University College London. He is Editor for the journal *TESOL in Context*, Visiting Scholar at Teachers College Columbia University and Kings College London, and Nominating Member of the International Language Testing Association (ILTA). His PhD dissertation on assessing Interactional Competence is the first Australian dissertation to win the American Association for Applied Linguistics (AAAL) Dissertation Award. David's research program focuses on professional communication, Interactional Competence, language assessment, psychometrics (Many-Facet Rasch Measurement and Classical Test Theory), discourse analysis (Conversation Analysis and Membership Categorization Analysis) and clinical communication. His work has appeared in leading journals in the field such as *Language Teaching Research*, *Applied Linguistics Review* and *Language Assessment Quarterly*. He has two monographs on Interactional Competence under contract with Peter Lang and Routledge. *Address for correspondence*: International Centre for Intercultural Studies, UCL Institute of Education, University College London, 20 Bedford Way, Bloomsbury, London WC1H 0AL, United Kingdom. <dr.david.wei.dai@gmail.com>

Michael Davey is a recent PhD graduate from the University of Melbourne. His doctoral research focused on the roles of grammar, epistemics and membership categorization practices in second language interactional competence (L2 IC). He is currently working on research aimed at bringing insights from both interactional linguistics and membership categorization analysis to bear on the L2 IC and CA-SLA fields.

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Notes

¹ Unlike CA, there is also a tradition in MCA of analysing written texts. For examples, see [Hester and Eglin \(1997b\)](#) and [Eglin and Hester \(1999\)](#) for investigations into the intelligibility of newspaper headlines and a suicide letter, respectively.

² In this article, we use square brackets [] to denote an MCD and curly brackets {} to denote an SRP.

³ The goal of this paper is to begin to establish the practical value of using MCA and CA together as complementary methodologies in the investigation of IC. It is important to note that although, to the best of our knowledge, this represents a nearly novel approach in the specific context of IC (although, for IC adjacent studies that use MCA see [Park 2007](#); [Suzuki 2009](#); [Greer et al. 2014](#) on cross-cultural communication, [Siegel 2016](#) on English as a lingua-franca interaction, [Greer 2012](#) on multi-ethnic identities, [Cots and Nussbaum 2008](#) on communicative competence, and [Moutinho 2019](#) on interaction in the L2 classroom), there have long been calls for MCA and CA to be integrated in more general ethnomethodological scholarship ([Watson 1997](#); [Silverman 1998](#); [Stokoe 2012](#); [Moutinho 2019](#) and see also [Kasper 2009](#) for a similar argument applied more specifically to multilingual research).

⁴ HSK (Hanyu Shuiping Kaoshi): a standardized large-scale Chinese proficiency test that assesses L2 Chinese speakers' general proficiency.

⁵ This use of *jingli* as a term of address when speaking to one's manager is common in Chinese.

⁶ This phrase references the way in which members' descriptions of the world can imply putative category incumbencies even when explicit categories remain unnamed ([Butler and Fitzgerald 2010](#)). As we shall see, by describing Sid and Mel's behaviour as 'nitpicky', Li Jia activates the possibility of Sid and Mel being 'nitpickers', and makes them accountable for dealing with this putative categorization in their next turns. In this data set, we see frequent examples of participants orienting (in their very next turns) to the admonition 'don't be so nitpicky' not as innocent advice, but as a negative evaluation of who they are as colleagues and people. See Excerpt 4 for a clear example of this.

⁷ One example might be the kind of person who, after a dinner with three people comes to \$92, is obsessed with ensuring that the extra \$2 is split up perfectly evenly.

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