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Title: Towards Complexity in Challenging Learner Autonomy Research Conventions: A Wider View on Learner Development

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Towards Complexity in Challenging Learner Autonomy Research Conventions: A Wider View on Learner Development

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Learner autonomy is a complex concept that can be viewed from the perspective of human agency and identity within a continually changing, multilingual ecology. In this article, I address three of the conventions of learner autonomy that have solidified in the research literature highlighting how these conventions are challenged by the research in Learner Development Journal 7. I also address some of the challenges created by the trend towards complex dynamics systems theory in learner autonomy research. Adopting a complexity perspective (Cameron & Larsen-Freeman, 2007) with critical realism (Bhaskar, 2016) as a meta-theoretical framework, I argue that practitioner research should continue to deepen our understanding of learner autonomy and change by flexibly combining perspectives together.

学習者オートノミー（自律学習）は、絶えず変化する多言語エコロジーの中で、人間の主体性とアイデンティティの観点から考えることができる複雑な概念である。本論文では、学習者オートノミー（自律学習）に関する3つの定説を取り上げ、これらの定説がLDJの本号の研究によってどのような挑戦を受けているのかを明らかにする。また、学習者オートノミー（自律学習）の研究において、複雑動的システム理論への流れが生み出すいくつかの課題についても言及する。複雑性の視点（Cameron & Larsen-Freeman, 2007）と批判的実在論（Bhaskar, 2016）をメタ理論的枠組みとして採用することで、実践者研究が、相反する視点を柔軟に組み合わせながら自律学習と変化に関する理解を深めていくべきだと主張する。

Keywords

learner autonomy, agency, complexity, practitioner research, critical realism
学習者オートノミー（自律学習）、主体性、複雑性、実践研究、批判的実在論

While the main author of this paper is Dominic Edsall, the writing was collaboratively developed by continuous dialogue and questioning by Aya Hayasaki and Ellen Head with Dominic. The authorial voice, knowledge, and overall perspective remain Dominic's.

Introduction

Conventions have a good side – we know where we are – and a negative side as they tend to lead to inertia and resistance to change. To challenge conventions you need to know what those conventions are. Building consensus on what the conventions should be, has been a fundamental issue in learner autonomy research (LA) for the last 40 years (Edsall, 2020) because there has been little agreement on what conventions are held to be true within the wider language teaching field (Block, 2021; Douglas Fir Group, 2016). I define "convention" here as a norm or rule that provides reason for action or evaluative judgement (Mamor, 1996; Rescorla, 2008). Conventions are both normative and arbitrary (Mamor, 1996; Ravenscroft, 2015), so the validity of learner autonomy (hereafter, LA)

conventions depends on their impact within the LA field. Something – for example, a belief in communication gap activities as the best way to follow a grammar presentation - may be a convention even if you and I as teachers do not slavishly follow such a norm. The problem occurs when conventions solidify into prescriptive rules which limit new understanding. In this article, I am going to identify three of the conventions of learner autonomy that have solidified in the literature before reviewing how LDJ7 challenges these conventions. Adopting a critical realist (CR) perspective on LA and ideas from positioning theory (PT), I then argue that to go beyond these conventions we must flexibly combine perspectives together. In some cases, seemingly opposed perspectives can be combined to overcome the limitations of those conventions. Throughout this article, I will ask questions that challenge the reader to think about their own teaching practices. Challenging a convention should be a creative rather than destructive process.

This article does not fit the mould of typical practitioner-driven research as found in the [Learner Development Journal](#) (LDJ). The positioning of this article within the LDJ is itself a challenge to the conventions of LDJ, which has a focus on practitioner research (e.g., Ashwell et al., 2021; Jarvis, 1999; Zeichner & Noffke, 2001). You, the reader, may have experience of practitioner research from teacher training or continuing professional development (Hanks, 2017; Menter et al., 2011). Menter et al. (2011) define 'practitioner research' as follows:

> Practitioner research in education is systematic enquiry in an educational setting carried out by someone working in that setting, the outcomes of which are shared with other practitioners. (Menter et al., 2011, p. 3)

Practitioner research can provide a valuable contribution to both practitioner understanding and academic understanding of teaching and learning (Hanks, 2017; Menter et al., 2011). The aim of this article is to address some of the LA conventions found at the nexus of theoretical and practitioner research, and upon which much LA practitioner research is based.

A core element to practitioner research is "systematic enquiry" (Menter et al., 2011). I argue that CR helps support systematic enquiry within LA practitioner research by allowing the combination of different theoretical research paradigms. I was invited to write this article by the LDJ editors to give a theoretical overview that would tie together the other articles in a meaningful way. It has developed through discussion with the editors and steering group over several drafts. I hope this article provides a creative challenge to the view that the philosophy of science that provides the basis for CR has no place in qualitative enquiry (Bhaskar, 2013). In the spirit of challenging the conventions, questions are interspersed with the sections of the article inviting the reader to reflect and apply the ideas to their experience.

Reflection Questions 1

When you think about your experience of language learning and language teaching up to now, do you have a sense of "conventions" in the sense of "accepted truths" regarding learner autonomy? What conventions appear to you to be helpful, and what conventions might need changing or challenging?

My Position as Author

I have been a teacher for nearly 20 years, but I first qualified as a science teacher specialising in chemistry before re-training in TESOL. Having studied chemistry, I learned about complexity theory through the mathematics of chemical reactions. Discovering that adoption of a

complexity theory perspective is becoming a convention in second language acquisition (SLA) and learner autonomy (LA) was not a surprise, but the misguided enthusiasm of some language teachers and SLA academics (e.g., Larsen-Freeman, 2018) was a shock. As a chemistry student learning statistical mechanics, quantum chemistry, and various combinations thereof, I could console myself that at least complexity in chemistry was usually a closed system with known variables. In SLA, a complexity theory perspective encompasses a wide open system of known and unknown variables, such as thoughts or future outcomes, which may remain completely inaccessible and difficult to analyse mathematically. When the inherent and unknown errors in a system may be orders of magnitude bigger than any number of Likert scales can cope with, how do you begin to model and run a mathematical simulation of learner autonomy? I came to this fundamental quandary in the course of my PhD research into teachers, learners, and views of LA in Japan. Only after I discovered critical realism (CR) as a meta-framework for understanding epistemology during my doctoral studies did complexity become less intimidating. My qualitative study of 35 students and 52 teachers at 12 different universities across Japan, exploring their views of LA and developing an ecological model of LA and identity, is inherently complex. It has demanded of me a fundamental re-examination of my own understanding of what knowledge is and how it is created. And CR helped me get a much better handle on this complexity.

Critical Realism as a Framework for Understanding Learner Autonomy

Critical realism (CR) is a meta-framework for bringing together different theories and frameworks. One of its implications is that there are limits to what we as teachers and researchers can know about LA (Edsall, 2020). CR is based on the philosophy of science and social science through the work of Archer (1995) and Bhaskar (2013, 2016).[1] Its perspective on reality as having layers helps explain the limits of empirical evidence in a complex world: one layer of all real possibilities, one layer of actualized possibilities drawn from the real, and one layer of empirical evidence drawn from the actual (see Figure 1).
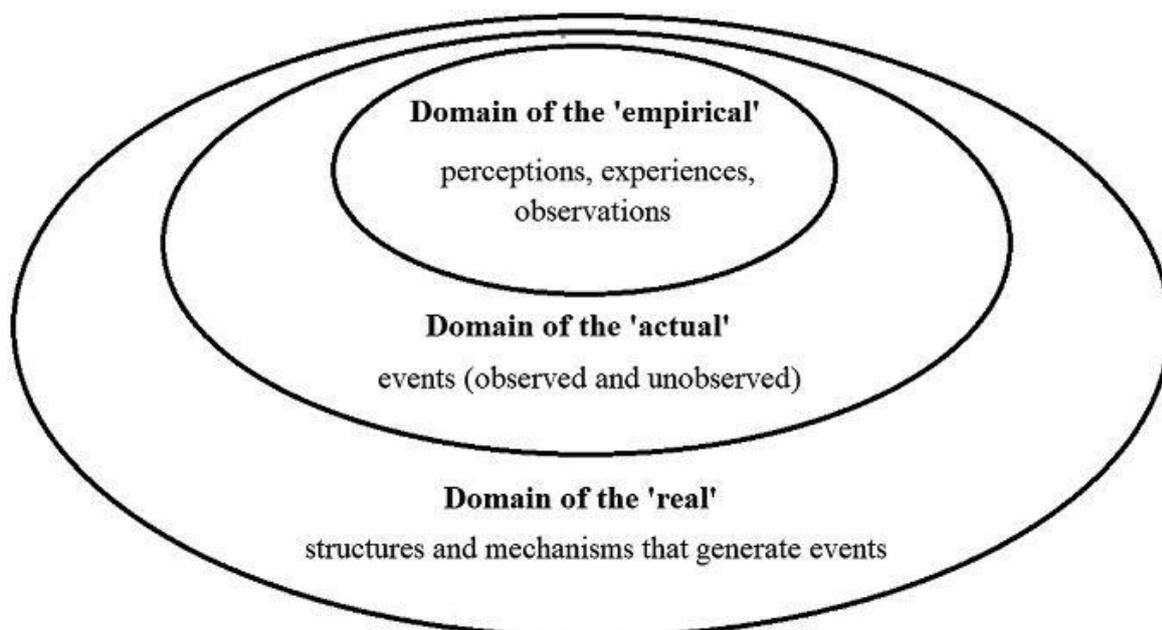

Figure 1. Bhaskar's CR layered reality (Hoddy, 2019 based on Bhaskar, 2008)

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1   The Roy Bhaskar Centre website has a number of useful resources that are [free to access here](#).

Bhaskar's map helps explain research complexity in a way that satisfies the need for a simplified map of complexity perspectives (Pallotti, 2021), without being too reductionist. This map could also inform our readings of LDJ7. The complex lived experiences documented in each article, are drawn from an open number of possibilities in the real layer passing through the actual layer to the empirical layer. One way to think about this is that the real layer is all the possibilities that could happen while you're asleep, the actual layer is everything that does happen while you're asleep, and the empirical layer is everything that did happen and that you learn about the next day, although some of what happened may always remain hidden from your awareness. This explanation is somewhat of a simplification, but the empirical is always a subset of the actual, which is always a subset of the real. You may never empirically find out everything that happened, i.e., the actual, and the full scale of the real layer will always be obscured. Figure 1 thus shows a simplified representation of critical realism's layered reality that could form the basis of such a map and help explain the sensitivities of complex dynamic systems.

Complexity's sensitivity to initial conditions is rooted in the differences between each layer: Over time different real possibilities become actual at different points but either of these may not happen or may not be empirically observed: past layers of reality provide the initial conditions for future layers of reality, but the connections between different factors across layers may not be observed, so the completeness of our understanding starts to break down. This goes to the fundamental reason for doing practitioner research - deeper, richer understandings can be developed other than by pure academic research alone. I argue that any examination of LA must adopt an open-ended approach: Looking at a student, we do not know the initial conditions of their LA and we cannot confirm the totality of LA after an arbitrary amount of time. Recognizing the complexity of learner autonomy development, we can only hope for a richer understanding (Edsall, 2020) and not a complete representative understanding. Research efforts that hanker after narrowly defined "best practices" are doomed.

Even the choice of time frame that helps decide when a set of "initial conditions" are observed is arbitrary and problematic within social research (Bhaskar, 2016). This raises the question of whether LA is even researchable (Edsall, 2020). Given that some practitioner-researchers have found students faking autonomy in an attempt to manipulate teachers or the system (Rivers, 2015) and that some teachers recognise "fauxtonomy," an inherent contradiction between their pedagogic beliefs and practices (Mullen et al., 2016; Rivers, 2002, 2015), it might be difficult to differentiate between what is and what is not LA. If we want to regard LA as a researchable construct, then the important philosophy of science (and social science) question is whether LA conventions can provide a "falsifiable" definition (Popper, 1963) of LA, because that would at least provide some explanatory power over empirical observations. At the same time, it is beneficial as a teacher, learner, or researcher to maintain a constructive creativity about the LA of individuals with different identities, perspectives and social positions.

Reflection Questions 2

As a teacher, do you ever come across situations in which it is difficult to be sure whether the students are genuinely autonomous? As a teacher, what would a constructive creative reaction be when students are apparently passive during a class?

Positioning and Identity as Aspects of Autonomy

Identity work is an ongoing process seen through sociolinguistic interactions, and it is vital to LA. Block's (2021) combination of CR and positioning theory (PT; Block, 2021; Harré & Langenhove, 1991; Langehove & Harré, 1994) provides an approach to analysing identity within the context of sociolinguistic interactions. Block's (2021) adaptation of PT is based on both the philosophy of science as well as philosophy more generally, bringing in socioeconomic factors, ideas about the distribution of power, as well as the cognitive and neurological perspectives in a transdisciplinary framework. This critical realist map of complexity that is not too reductionist (Pallotti, 2021) brings together the perspectives of TESOL, with its background of cognitively oriented SLA studies, and the more socially oriented field of education. As teachers, we need some heuristic system with sufficient explanatory power to inform our decisions: We need a rule of thumb - an experience- or preference-based decision model in complexity theory terminology (An, 2012). One way of understanding these rules of thumb for language teaching has been proposed by the Douglas Fir Group (2016) based on Bronfenbrenner's (1977, 1979, 2009) ecological model of human development as shown in Figure 2.
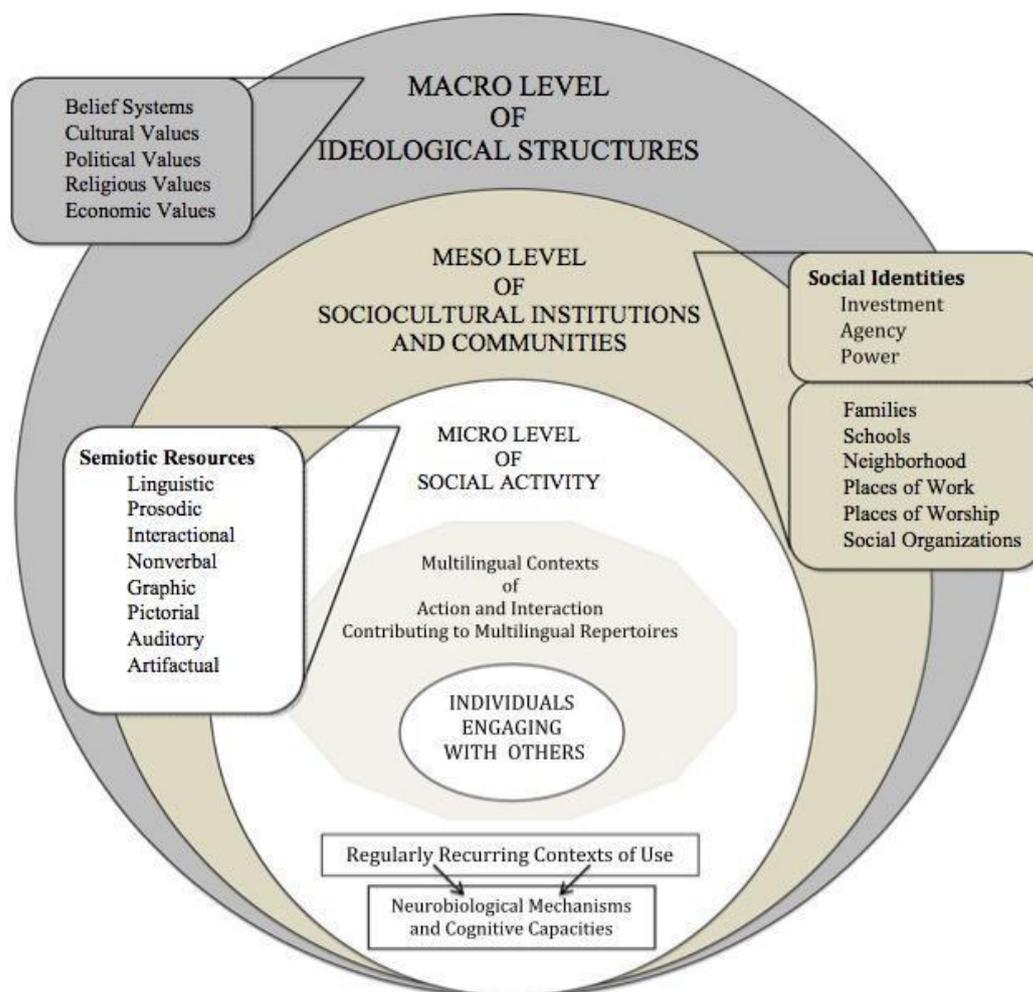

Figure 2. Douglas Fir Group's (2016) Transdisciplinary framework for SLA in a multilingual world

In this framework, conventions from opposing cognitive and social perspectives on SLA are arranged within different spheres extending out from the learner, representing the different spaces that influence language acquisition (Douglas Fir Group, 2016). Contextualising this framework around teaching and teacher identity, De Costa and Norton (2017) note that this allows teachers to navigate dominant ideologies, institutional constraints, and classroom challenges as they construct and reconstruct their professional identities.

Taking a look at this framework, we can already see that it has explanatory power to bring together all the studies in LDJ7 and give us a fresh sense of various alignments and resonances between them. For example, it connects with Takagi et al. (2023, this issue), who show that teacher autonomy is important in order to foster autonomous learning communities within the classroom. De Costa and Norton (2017) make the argument that teacher identity work creates a unique, personal experience across the macro-meso-micro levels for each teacher. This means the rule of thumb will actually be different for each teacher. There might be some superficial consensus between teachers working in the same or similar institutions, but actually each teacher will create their own unique rules of thumb through their own identity work.

Reflection Questions 3

What kind of "rules of thumb" are you aware of in your own learning and teaching? Do you have different "rules of thumb" in different contexts?

In my teaching context, the Douglas Fir Group framework provides a helpful way to understand why students make choices that I might consider irrational as the teacher. In my doctoral studies, it helps explain the dispositions that teachers adopt towards learner autonomy and the related goals of their institutions, exploring how the social field of the classroom is affected by the individuals within, the institutional power structures above, and wider global influences. No model exists in isolation. An important precursor to the Douglas Fir Group model, Bronfenbrenner's (1977, 2009) ecology of human development offered a map of the impact of global realities, institutional power structures, classroom social realities, and cognitive resources. Since the publication of the Douglas Fir Group model, Block (2021) has worked with its implications for social identity. These have been indispensable in my own research into teachers' views of learner autonomy in Japan.

Finally, the scalability, rigour, and philosophical depth of both CR and PT appeal to my identity as a science teacher who has converted to TESOL, even if there are some methodological problems that need to be ironed out (Head, 2022). I want my scientific understanding of the world to be reconcilable with my understanding of teaching. Identifying what the conventions are within LA research might offer new insights into how to bridge the research-practice divide. This might then be the first step back from the concrete minutiae to the bigger abstract picture for me as an author, and indeed as an observer, researcher, interpreter, and so on. Having explored how positioning and identity might be viewed from a broader perspective as connected to learner autonomy, in the next part of the article I will discuss three conventions of learner development research which I feel need to be challenged.

Reflection Questions 4

Looking back at the diagram of the Douglas Fir Group model, which area of the model do you feel is the most approachable and interesting? Why?

Convention 1: Defining Learner Autonomy

It's over 40 years since Holec (1981, p. 3) provided his influential definition of learner autonomy. It has since gained recognition within the language teaching community as the conventional definition of learner autonomy, namely "the capacity to take charge of one's own learning." (Benson, 2011; Jiménez Raya et al., 2017; Palfreyman, 2021). Many interpretations of this definition adopt a cognitive perspective (Little, 1991), making a psychological judgement of the learner by linking the capacity for responsibility only to observable behaviours (Edsall, 2020). While Holec's was not the first definition of learner autonomy, as evidenced by the much earlier work of Dewey (1938/1998), Piaget (1959), and Dearden (1975), it became widely adopted and gained convention status through inclusion in the Council of Europe's Modern Languages Project (Holec, 1981; Jiménez Raya & Vieira, 2021). Palfreyman (2021) argues that Holec's conceptualisation of LA was not intended to be so narrow, but as this definition has become convention over the 40 years since its publication, the knowledge claims within Holec's work became codified symbols in a research literature mainly concerned with practical applications (Leydesdorff et al., 2016; Palfreyman, 2021). As Palfreyman (2021) also argues, Holec's intentions have since been reinterpreted or even misunderstood. Discourse within the professional TESOL community split around the conceptualisation of learner autonomy as a cognitive capacity (Benson, 2011; Benson, 2013; Little, 1991) - an allegedly quantifiable neurological limit on students' abilities that is somehow separate from agency, a social capacity. This separation of autonomy and agency into the cognitive and the social in the TESOL community (Benson, 2013) matched a split in the wider educational field between cognitive and social understandings (Block, 2021; Douglas Fir Group, 2016; Moore, 2004, 2013); between positivist (quantitative) and interpretivist (qualitative) knowledge claims (Moore & Müller, 2002). The conventions of research and academic publication have also tended to favour a singular focus on quantitative (positivist) or qualitative (interpretivist) research methods, with mixed methods hampered by limited time and more limited research funding compared with other methods (Wisdom & Fetters, 2015) and a bias of particular universities or research communities to one or the other and a feeling that mixing the two is not a correct way to do research. This bifurcation between ways of understanding the world, research methods, funding, and communities was something that the Douglas Fir Group (2016) were hoping to overcome by encapsulating a much wider array of theories and research lenses.

In the intervening period since 2016, there has been a proliferation of work drawing on the idea of complex dynamic systems that is both academic and practitioner based. Mercer (2019) reinterprets autonomy as a cognitive need for learners to feel "an active sense of being able to influence their learning experiences" (p. 651), but makes the argument that relatedness and agency must be involved if students are to engage with language learning. Reeve (2022) links autonomy and agency through self-determination theory (Reeve et al., 2004), categorising autonomy as the motivational need for ownership of learning, and agency as motivation. However, Reeve (2022) does not resolve the gap between the idea of autonomy as a cognitive capacity and agency as motivation leading to agentive engagement. While there are the beginnings of a shift towards interconnected frameworks, such as the Douglas Fir Group framework, autonomy remains separated from agency in much of the literature, creating one of the first conventions of learner

autonomy: Autonomy is a cognitive competence, while agency is a separate socio-affective capacity for action.

Rarely has conventional separation of autonomy and agency been challenged in the literature (Chong & Reinders, 2022; Edsall, 2020; Little, 2020; Palfreyman, 2021) until recently when researchers have started to attempt to study specific contexts that are supportive of learner autonomy, such as university self-access centres (e.g., Reeve, 2022). Much of this work has grown out of the recent development of self-access learning culture, stimulated within the Japanese context by educators like Cotterall and Murray at Akita International University, Murray later at Okayama University, and Mynard at Kanda University of International Studies. Learning advisors have access to do one-to-one research in a very natural way and develop insights into longitudinal patterns of development as part of their job. For example, Mynard (2020) adopts sociocultural concepts on agency, dialogue, and interaction to explain how advising can support the development of the metacognitive skills and self-determination necessary for autonomous learning. In examining learner engagement through self-determination theory, Mercer (2019) argues that learners have genuine learner agency within the classroom. There is an implicit acceptance of agency and the social within recent literature while still retaining a focus on the individual psychology of learning. This contrasts with early attempts to explain the effects of socialisation on learner autonomy, such as Benson (1991), that maintained that socialisation was a primarily oppressive force restricting individual metacognitive skills, such as critical reflection. Examples of the interplay between socialisation and critical reflection can be seen in Morioka (2023, this issue) and Barfield and Nakayama (2023, this issue), both highlighting positive and negative outcomes, raising questions about the role of reflection.

Reflection Questions 5
How different is the social field of the classroom in which you teach, from the other social fields in which your students participate? How do you negotiate or navigate the different understandings about the respective roles of teachers and students, if their understandings are different from yours?

Convention 2: Democratising Learner Autonomy

The second convention that I would like to challenge is that learner autonomy is always the most rational choice because it is in the best interests of the student in a democratic society (Dearden, 1975; Jiménez Raya et al., 2017); therefore, a failure to be autonomous during a language class must be a learner's failure to make a rational choice. Overt expression of learning engagement is considered essential in some frameworks for learner autonomy, such as Jiménez Raya et. al. (2017). This creates and maintains a deficit model of learner autonomy - if a learner is not autonomous, then it is the learner's cognitive deficit that is to blame. Problematic individual differences in a learner's psychology are criticised for a lack of observed autonomy rather than other social factors, which are dismissed as due to unregulated affective or emotional factors (Jiménez Raya et al., 2017). This contrasts with Reeve's (2022) work that accepts that learner engagement is not directly linked with cognitive capacity. In Reeve's model, students may become disengaged due to social or environmental factors. Unfortunately, many scholars until now have adopted a stance resembling rational choice theory (Archer, 2000), which assumes that human behaviour is a series of rational choices. The assumption that autonomy is always an outwardly rational choice can be found in much of the learner autonomy literature (Benson, 2011; Benson &

Voller, 2014; Dam, 1995; Little, 1991; Littlewood, 1996; Murray, 2021; Reinders, 2021). This idea ignores the fact that classrooms do not always provide much freedom and autonomy might not be perceived as being in that individual's best interests at a specific time or place (Archer, 2013; Mullen et al., 2016; Rivers, 2002, 2015), especially if the classroom is not seen as democratic by the students (Head, 2006a, 2006b) or if the teacher does not value the students' identities (Norton, 2014). Under such a frame of mind, the rationality of autonomy choices is judged by the teacher rather than the learner making those choices, which raises further questions about the empirical reliability of such judgements (Edsall, 2020). Non-participation, for example, is often seen as the most logical choice by students (Norton, 2014), even though it may appear to be irrational to the teacher.

Like most authors and teachers, I would argue that learner autonomy is beneficial to students, but I equally believe that it is wrong to assume that students' choices around autonomy are insulated from the rest of their lived experiences. Little (2020) points out that Holec's definition of learner autonomy was developed in the context of organisational choices in adult education. More social definitions of learner autonomy, such as Dam's (1995), where a rational choice is also a socially responsible choice within the secondary classroom, reflect the wider context in which education aims to develop teenagers into responsible adults. Of course, all modern education systems aim to develop responsible adults, but the difference is in how the term, "responsible adults" is defined and who creates/enforces that definition. For example, Japan's 1998-2003 policy failure that was *yutori kyouiku*, relaxed education (Sakurai, 2016), could be seen as an example of where a new definition of "responsible adult" failed due to insufficient support.

For me as a teacher, finding a rational cause-and-effect relationship can be a relief because it makes teaching simpler, but very few people are always rational. The role of affect or emotions on learner autonomy is comparatively under-described in the literature (Aoki, 1999; Swain, 2011). Chong and Reinders (2022) found only a few references in autonomy-related literature to affect within specific self-regulatory learning frameworks. This focus on learner self-regulation can be seen in the second convention that displaying learner autonomy in the classroom is always the most rational choice for students. Such an assumption allows researchers to ignore the messy reality of emotions, akin to Krashen's (1985) "affective filter" hypothesis of much older SLA literature (Swain, 2011; VanPatten & Williams, 2014). Approaching emotions and affect from the individual differences' perspective, much of the research that looks at the effects of affect on autonomy is concerned with supposed irrational choices that block or hinder autonomous study, which conveniently - but misleadingly - bundles together factors that are difficult to tease apart.

Reflection Questions 6
As a teacher, do you think that the learners' emotions are important? How do positive and negative emotions function in motivating your students in your classroom?

Convention 3: Insulating Learner Autonomy

The third convention in the learner autonomy literature that I will challenge is based on the first and second conventions, and it is that learner autonomy does not vary over time or between contexts. This convention is being increasingly challenged as researchers examine learner autonomy from a complexity perspective (Larsen-Freeman et al., 2012; Larsen-Freeman & Cameron, 2008; Paiva & Braga, 2008). Many works in the literature

clearly delineate this insulation of autonomy by arbitrating that "autonomy" is separate from "learner autonomy," which in turn is separate from "language learner autonomy" (Benson, 2011); and that LA can be separated from politics and everything else beyond the classroom walls (Benson, 2014). An alternative view proposes that learner autonomy is a Western concept bundled up within linguistic imperialism (Humphreys, 2014; Humphreys & Wyatt, 2013). Some researchers have put forward the view that learner autonomy can be studied in isolation from time and life events (Bei et al., 2019; Dixon, 2011; Macaskill & Taylor, 2010; Murase, 2015; Yen & Liu, 2009). Many of these delineations are the result of the underlying research epistemologies - the specific researcher's theory of knowledge, where more positivist epistemologies require more isolation of learner autonomy conceptually (Edsall, 2020), resulting in differing degrees of insulation of learner autonomy from other factors. This can be seen in Jiménez Raya, Lamb and Vieira's (2017) positioning of learner autonomy on a spectrum of definitions, requiring the separation of agency and autonomy as per the first learner autonomy convention. This creates conceptual insulation between agency and autonomy.

Adopting a complexity perspective on learner autonomy (Paiva & Braga, 2008), we can see critically that much of this conceptual insulation is for practical expediency, enabling a specific research method at the cost of banal results (Edsall, 2020). We can also see that some of this insulation is the result of structure within the wider fields of education and applied linguistics, and the different subfields of language teaching (Block, 2021; Douglas Fir Group, 2016; Edsall, 2020), which much of the learner autonomy literature ignores (see Figure 3 in the following section). Where the literature does not ignore such structures (Benson, 2000, 2008; Lamb, 2008; Little, 1995; Nakata, 2011), it is usually in relation to teacher autonomy, but the obvious link with learner autonomy via agency is often ignored. One danger of considering autonomy in isolation from other factors is that the presentation of autonomy in pre-service and in-service teaching programmes can produce a double-bind for teachers in which they "have" to incorporate certain kinds of methodology due to a government policy, imposed from the top, supposedly in favour of learner autonomy, but without the resources or a complete understanding of how to do so. As mentioned earlier, the implementation of Japanese *yutori kyouiku* [relaxed education] was just one example of an attempt to introduce autonomy which had limited success for such reasons (Head, 2006b). To overcome such structural constraints on observable autonomy, adoption of a complex dynamic systems perspective highlights the interconnectedness of various factors, while allowing practitioners to focus on a small area available to them for research (Dörnyei, 2014; Larsen-Freeman et al., 2012; Paiva & Braga, 2008).

Reflection Questions 7
What links have you established between learner autonomy and the agency of your students? What kind of observable behaviour makes you feel that your students are agentive or autonomous?

The Complex Effects of Change and Affect

Above I have described how many learner autonomy studies have come to be insulated from time or contexts. The insulation of autonomy from research on emotions is equally problematic. Emotions do influence our choices (Swain, 2011) and, as an important factor in our choices, emotions are an inseparable facet of our humanity and the empirical science that we do (Bhaskar, 2016). Emotions also form an important aspect of learner

identity development (Hiver et al., 2021; Miyahara, 2015). This is quite perplexing when studying learner autonomy because it creates a complex nexus of different factors that we can only hope to understand partially (Borges, 2022; Edsall, 2020). Barfield and Nakayama (2023), for example, discuss their own struggles as teachers to understand student approaches to Project-Based Learning and the different factors they encounter. Morioka (2023, this issue) finds that reflective activities with teenage students may actually discourage engagement with group work in some circumstances. Kawasaki (2023, this issue) grapples with this notion directly by looking at how peer interaction influences emotional regulation. All three articles challenge much current research which fails to account for the complexities of affect.

What we can state is that many important choices occur at points of change and that we all react differently to change (Williams, 1999). At each point of change, our reaction is going to be based on whether we individually see the event as positive or negative, which involves an evaluation that is based on both rational and irrational responses to that change. In my doctoral work, I adopted Williams' (1999) template for human responses to change; the model was intended to identify successful strategies for recovering from change induced crisis - a practical purpose that bridges both cognitive and social perspectives. How each individual responds to the same change may be different or the same, and an outside observer may not see any response or even notice that there has been a change (see Figure 3).
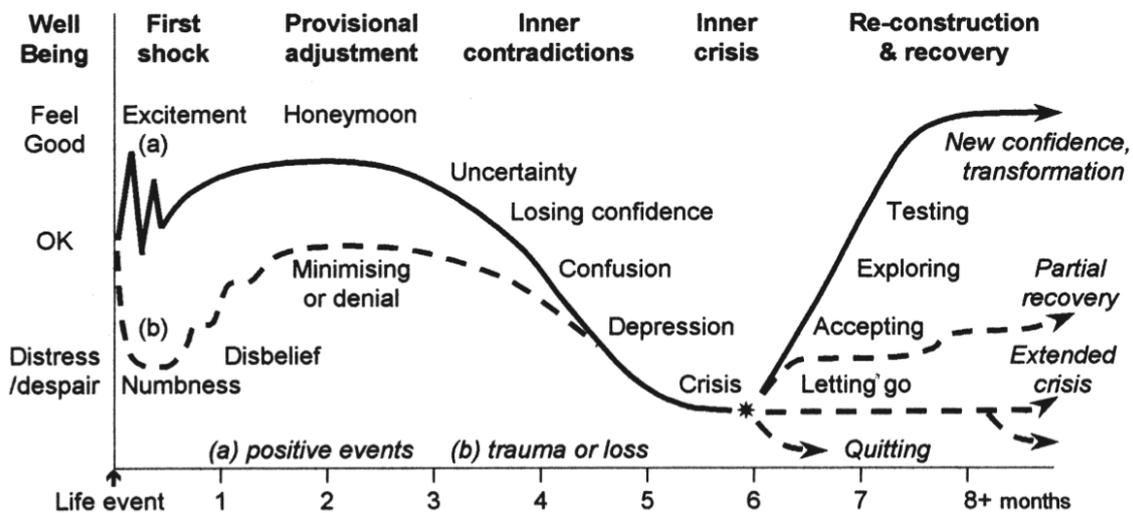

Figure 3. William's (1999, p. 611) template for human responses to change

In Williams' (1999) model, a crisis point is where dramatic change and responses are most likely to be empirically observable to an outside researcher. Unexpected success in a major speaking test or an embarrassing mistake can bring about change through responses to that event. However, we can envision similar but less dramatic points of change that influence the learner and create both diversity of choice and diversity of change with learner autonomy and learners. In this connection, Barfield and Nakayama (2023) highlight their own struggles and diverse crisis points as teachers trying to manage both students and curriculum change. Yunita (2023, this issue) adopts a complexity perspective by focusing on the two learner's behavioural changes given their affective state and regulation within individual constraints and the external context. This external context is depicted in terms

of events which push learners towards autonomy and people and things[2] which support autonomy, but remains an open complex system, of which some aspects are accepted as being unknown.

Adapting William's model to include points of change as well as crisis, we can trace how a learner's journey passes through points of change, where those points of change emerge from events at different levels of the Douglas Fir Group framework. Through use of a learner narrative approach (Barkhuizen, 2016, 2017a, 2017b), Yarwood (2023, this issue) traces Hiroto's emotions through three different levels from the micro level representing individual thoughts, emotions, and beliefs; to the macro level representing institutional and social spaces; and to the meso level representing the ideological and cultural contexts. This narrative approach allows Yarwood (2023) to trace salient variables across these different levels to illustrate how emotions impact motivation and provide metacognitive resources. We can see that this challenges the second convention that learner autonomy is always a rational choice because learner autonomy could also be the irrational choice: In Yarwood's (2023) study, Hiroto re-evaluated negative experiences of self-directed learning at an emotional level through positive interactions with an empathic advisor and increased self-awareness. This demonstrates that autonomy is involved in the constant process of learner re-construction of identity (Darvin & Norton, 2015; De Costa & Norton, 2017; Huang & Benson, 2013; Murray et al., 2011). Yarwood's research also demonstrates that we can get a better picture of learner autonomy by examining the different complex layers in which we do identity work as learners and teachers and tracing our unique trajectories through these spaces. This idea of complexities will be further discussed in the following section, but I would first like you to pause and think about your own teacher identity.

Reflection Question 8

How has your autonomy as a teacher and learner been involved in the (re-)construction of your own teacher identity?

A Critical Stance on Complex Perspectives in Language Learning and Autonomy

At this point, we need to look more closely at what we mean by adopting a complex dynamic systems theory perspective. It is self-evident that language learning and by extension learner autonomy are complex and should be viewed from a complex dynamics system perspective (Atkinson et al., 2016; De Bot et al., 2007; Hiver et al., 2022; Larsen-Freeman et al., 2012; Larsen-Freeman & Cameron, 2008; Ushioda, 2021). The real danger in adopting a complex dynamics system *perspective* is that we might get carried away with the word "perspective" encouraging us to make unsupported assumptions and misuse CDST terminology. There is also the temptation to give up on other social methods even where it might be possible or useful not to do so (Pallotti, 2021). To avoid this danger, I propose to adopt a critical realist *stance*: I use the word *approach* here to denote a scientific methodology or set of procedures that are agreed within the literature. In a complex dynamics system *approach*, such as meteorology, most of the underlying connections between factors are reasonably well known allowing an approximation of the errors involved in trillions of calculations using billions of data snapshots taken every minute across and through the earth's atmosphere (Huba et al., 2014). As language teachers we cannot possibly hope to replicate

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2   I use 'things' here to encompass the vast array of supports for learner development (e.g., Barfield, 2014).

that level of explanatory power and weather forecasts are not even that accurate or precise, yet the words "complexity" and "complex dynamic systems," and the abstruse terminology used in the field (Sampson & Pinner, 2021; Ushioda, 2021), convey a greater sense of legitimacy to truth claims than the word "*perspective*" alone can really support. Critical realism allows us to work with the incomplete nature of such perspectives (Edsall, 2020, 2022).

While many recognise that as language teachers we must adopt a *perspective* rather than an *approach* (Larsen-Freeman & Cameron, 2008), there are many examples in the literature where researchers have unwittingly made insufficiently supported claims to truth and empirical evidence, with Hiver et al. (2022), for example, finding 63 research papers in a scoping review of 20 years of CDST research. There is a danger in research that confuses *perspective* with *approach* basking in undeserved scientific legitimacy and misleading future researchers - scientism (Lerner, 2020) without the actual scientific evidence to support such rhetoric. A claim to have found an attractor state, for example (Whiteside, 2013), is a statement that carries with it a specific mathematical meaning that can be supported only by a complex dynamics systems *approach* and not a mere *perspective*. That is not to say that language teachers must abandon the ideas of complexity. We need to be mindful that the very nature of complexity that is the source of such a perspective's explanatory power, namely the concepts of complete interconnectedness between data snapshots (the relational principle), emergent behaviour, and sensitivity to initial conditions (the adaptive principle, highlighting the importance of time) (Hiver et al., 2022; Lerner, 2020), can also obscure our understanding and place hard limits on the truthfulness of any insight it provides (Alemi et al., 2011; An, 2012; Edsall, 2020, 2022). We also need to be mindful that imprecise adoption of complexity perspectives may provide the frustrated positivist with a pragmatic excuse not to engage with a more holistic approach that encompasses qualitative as well as quantitative research. For example, in a recent scoping literature review, Hiver et al. (2022) highlight a number of studies whose methodologies were incompatible with explaining the dynamics of change that were claimed to be the focus of study.

Reflection Questions 9

With those caveats in mind, are you interested in adopting a complex dynamic systems perspective to better understand learner autonomy? Which of the approaches, if any, which you have read about in LDJ7 attract you as a means of developing your own understanding of autonomy?

Identity, Autonomy, and Ecological Perspectives

Language is both a linguistic system and a social practice, where identity is negotiated in a complex context of unequal social relations (Darvin & Norton, 2015; Norton, 2013, 2016, 2021). Norton (2013, p. 4) defines identity as "the way a person understands his or her relationship to the world, how that relationship is structured across time and space, and how the X's understands possibilities for the future." As teacher-researchers, we should be concerned with the social structure of our classrooms as they give us specific time-dependent snapshots of different communities of practice (Brouwer et al., 2012; Burgess, 2010; Lave & Wenger, 1991, 1998; Leander & Sheehy, 2004,; Lemke, 2009). From a complexity perspective, we should be thinking about *when*, the *amount of time*, and the *zeitgeist*[3] as possible temporal factors (An, 2012; Castellani & Hafferty, 2009; Lemke,

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3   The prevailing ideas, attitudes, and beliefs within a social field may impact the strength of connections between when, the amount of time, the speed at which events happen, and other factors, and may also impact empirical observability.

2009; O'Sullivan, 2004). A learner's negotiations of their own identity will inform their understanding of learning and their conception of the future possibilities of learning later, which matches well with Bourdieu's (1977) concept of *habitus* - another possible lens in the CR toolkit that we can use. The concept, *habitus* can be defined as a transposable system of dispositions towards agency that enable individuals to negotiate different situations based on past experience (Block, 2021). Traces of this idea can be seen in how Nakayama (Barfield & Nakayama, 2023) wants to make her students "break through the cocoons of habituated thinking and assumptions" (p. 19). Nakayama (Barfield & Nakayama, 2023) gives an example of how this "breaking through the cocoon by students" came about by intercultural contact, while in Barfield's case, it happened when his seminar student adopted a critical perspective on her own consumption habits and the practices of different fast fashion actors. Adopting a Critical Realism stance (Bhaskar, 2016), we can see that such knowledge production transforms our social identities as the diversity of unique experiences gives rise to a diversity of social, political, and cultural identities (Bhaskar, 2008, 2016). As both a part and a result of such negotiations, the results of any agency exercised in the pursuit of autonomy will constantly re-inform the learner's understanding of agency and autonomy and the future possibilities thereof within and beyond the classroom setting. This can be seen in all of Harrison (2023, this issue), Kawasaki (2023), and Takagi et al. (2023) where learning about both EFL and LA happens in a community of practice (Lave & Wenger, 1998, 2002; Tassinari, 2017; Wenger, 1998, 2000) fostered by the teacher.

Adopting a complexity perspective can bridge the gap between social and cognitive perspectives and the gap between the concepts of societal, institutional and personal autonomy (Benson, 2019; Block, 2021). So, negotiations of identity within a classroom will have an impact on the amount of learner autonomy observed or unobserved: Learner autonomy plays a role in the identity negotiations within a classroom because of the inherently complex, social nature of such a community of practice (Lave & Wenger, 1998; Wenger, 1998, 2000) and vice versa: Identity as social struggle (Darvin & Norton, 2015) will feedback to learner autonomy. Thus, Kawasaki (2023) found that a classroom learning community can increase the likelihood that students will express their identity openly enabling more successful language learning. Similarly, Takagi et al. (2023) also discovered that when a teacher had the autonomy to create such a learning community, the students' learning and creativity flourished.

Practitioner research often has a profound impact on identity. We can see this process at work in many of the articles in LDJ7, for example in Harrison's paper, which uses the genre of autoethnography to explore the interpretation of public and private identities (Harrison, 2023). Practitioner research often involves classroom interventions aimed at creating occasions when learners can exercise agency and develop autonomy. Kawasaki's experiments with peer support (Kawasaki, 2023) and Morioka's trials with group reflection (Morioka, 2023) offer relevant examples here.

No matter a learner's cognitive capacity for taking responsibility (Holec, 1981), we cannot see learner autonomy unless there are spaces within the other spheres that are supportive of learner autonomy and agency. Ahearn (2001, p. 112) defined agency as the "socioculturally mediated capacity to act," and so our observations of learner autonomy via agency must be socioculturally mediated in some way.

The Critical Realist Challenge to Conventional Understandings of Learner Autonomy

In this article I have set out to frame what some of the conventions of learner autonomy are and how these three presented conventions are challenged from a complex systems perspective. The first convention that autonomy and agency are separate, unconnected concepts continues to be challenged by a growing body of literature that examines autonomy within wider social contexts that are supportive of autonomous learning. The work of the Douglas Fir Group (2016) brings together social and cognitive perspectives on language learning, further questioning the methodological separation of autonomy and agency. Adopting a complexity perspective (Cameron & Larsen-Freeman, 2007) with critical realism (Bhaskar, 2016) as a meta-theoretical framework, I argue that learner autonomy and agency are intrinsically linked.

Challenging a convention should be a creative rather than destructive process as the authors in this issue have shown. Yarwood (2023) and Yunita (2023) demonstrate the importance of understanding learners' histories, and the role of affect in how their trajectories through learning change. Harrison (2023) demonstrates the importance of understanding ourselves deeply and holistically as teachers as a way to support learner development. Kawasaki (2023), Morioka (2023), and Barfield and Nakayama (2023) explore aspects of learner autonomy as a social rather than purely cognitive capacity, and how learner autonomy must be viewed as connected to the wider context rather than in isolation. Takagi et al. (2023) focus on a situation in which a teacher has the autonomy within their institution to foster a creative and supportive learning community.

I hope that this article has shown that the deep understanding that practitioner research can provide is strengthened by adopting a CR stance within a complex dynamic systems theory perspective. Combining social and cognitive perspectives creates possibilities for teacher-researchers to better understand both themselves and their students from the perspective of human agency and identity within a multilingual ecology. My article has focused on the meso and micro levels of the Douglas Fir Group (2016) framework (see Figure 2). On the way it has created a number of questions for myself and other teachers, and also hopefully for you, the reader. Adopting a critical realist stance in a complex dynamic system perspective will allow further exploration of these important questions.

Author Bios

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エデソル・ドミニクは京都府立医科大学の医療コミュニケーション学助教であり、UCL Institute of Educationのカリキュラム・教育学・評価学の博士課程に在籍している。博士課程では、教師のアイデンティティと学習者オートノミーの交渉について研究している。奈良女子大学非常勤講師として教育方法論も教えている。研究テーマは、学習者オートノミー（自律学習）、主体性、言語学習におけるアイデンティティ、批判的実在論、CLIL、教育学、教師開発、カリキュラムなど。

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エレン・ヘッドは宮崎国際大学で准教授として勤務している。Autonomy You Ask！選集から最近ではLD30カンファレンスまで、多くのLearner Development SIGプロジェクトに関わる。これまでの研究には、CEFR（Common European Framework of Reference）のCLILプログラムへの応用も含まれている。

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