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Debating the status of ‘theory’ in technology enhanced learning research: Introduction to the Special Inaugural Issue

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1. Introduction

This Inaugural *Special Issue of Studies in Technology Enhanced Learning* has a particular focus on ‘theory’—a contentious matter. Occasionally disparaged as obscure, or alienating, it seems fair to say that theory has never been so deeply embedded in Technology Enhanced Learning (TEL) research as it has become in many other areas of scholarship. One reason is that TEL is often conceived as a ‘practical’ field, with ‘theory’ negatively counterposed against other priorities: methodological innovation, ‘evidence’, ‘best practice’, or, more recently, imperatives towards being ‘data driven’. Furthermore, the use of theory can often be a stumbling block for many novice researchers: even those inclined towards ambition in their use of theory can struggle in getting to grips with the attendant vocabularies, or when actually using particular theories in their own research. Many may come to wonder whether doing so is really worth the effort.

The impetus for the present issue is a contention that ‘theory’ really *matters* for TEL. That contention is widely shared by members of the Centre for Technology Enhanced Learning¹, a research centre at Lancaster University, UK, which, while part of the Department of Educational Research, has members drawn from a variety of disciplines. Indeed, the initial idea for the issue grew out of a longstanding sequence

of discussions within the Centre—which the two present authors, at the time of writing, jointly direct—which have expressed a desire to emphasise the importance of 'theory' to others. One earlier idea, for example, had been for the Centre to write a "report" on theory in TEL research. The current Special Issue was taken up, instead, as we came to realise that the idea of collectively writing about 'theory' might dovetail with the idea of launching an open-access journal, and that a Special Issue might allow for a more multi-vocal consideration of the subject matter.

For several years now, the Centre has foregrounded, in a deliberate and distinctive decision taken by its members, the topic of 'theory' as a core part of its research priorities. Indeed, on the Centre website, that topic is positioned as one of the Centre's three core "research themes". The website's public description of that theme, whose full title is *Criticality, theory and research*, begins by making the following assertions:

We are enthusiastic about technology enhanced learning, but we are also critical. We want to improve learning using technology, but we understand that there is no single or direct relationship between technology, learning and education. We recognise the need to theorise the complex role of technology in educational practices. That if we want to change learning and education using technology, we must account for theories of learning, education, and institutional change. That if we want to change the world by improving education, we must account for the wider nature of that world: sociologically, politically, historically, and economically. That we must develop disparate visions of technology enhanced learning that learn from, further develop, and speak back to other disciplines—so understanding the nuances of educational phenomena from a range of perspectives. That theorising technology enhanced learning and engaging with academic fields is a necessary precursor to empirical advancement and the changing of real-world practice. ("Centre for Technology Enhanced Learning Research Themes", n.d.)

Those assertions are also a reasonable summary of our initial starting point for this Special Issue. Our Call for Papers, which benefitted from discussion and refinement at Centre meetings, requested contributions focussed on a number of questions which, for us, were of central importance for the further development of TEL scholarship. How can theories (whatever they are) help us think differently about technology enhanced learning (whatever that is)? To

what extent is research in the field "theoretical" (or should it be)? Which theories might influence our scholarship (and how)? How do theories come to gain or lose prominence within the field (and how do researchers make choices about which theories to use)? How important is theory for contributing to our objectives (or when weighed against other priorities)?

Inevitably, some of those initial stimuli elicited a more extensive response than others. But we were delighted that many paper proposals did address, in novel and interesting ways, a range of those questions. While many of those who submitted proposals had been involved extensively in our research centre for some time, that several responses to our Call for Papers came from individuals outside our immediate networks reinforced, to us, the advantages of the Special Issue format, by comparison with a Centre report, for fostering a conversation about theoretical topics. Moreover, those responding—whether previously associated with the Centre or not—drew on a range of theories and approaches to frame their work, and were based in a variety of geographical locations. The Special Issue that follows is testament, then, to the diversity of thinking on theoretical concerns that is currently spreading throughout those communities of scholars who focus on TEL.

The Special Issue does not, it should be clear, project a single point of view on these questions—it was never intended to do so. Rather than reaching consensus or advocating for the editors' own points of view (we often disagree!), our concern is to provide a space for debate and reflection. As we stated in the Call for Papers, we regard iconoclasm, contrarianism and angular arguments as quite welcome, on an ongoing basis. Furthermore, our aim, in curating this issue, was to carry a range of paper formats, of widely varying lengths. In keeping with the remit of the journal (cf. Bligh & Lee, 2020), we aimed to give contributing authors the freedom to write reflectively and break, where appropriate, with those rigid conventions of format often imposed on journal submissions in the TEL field. In particular, we wished authors to write in ways that might encourage readers to *engage with their arguments* and, thereby, to foster continuing debate and reflection—within a community which, we hope, might cohere around the journal over the coming period. As one mechanism for sparking such debate, we also sought short commentaries on the articles we accepted, a number of which appear in this issue. We shall continue, in the future, to seek further articles and responses (long and short) on the topics covered.

This desire for flexibility and multivocality should not be taken, however, to imply that those articles we present

1 <https://www.lancaster.ac.uk/educational-research/research/centre-for-technology-enhanced-learning/>

below have not undergone a rigorous process of peer review. We received 20 paper proposals in response to our original Call for Papers; the subsequent editorial meeting, at which Brett Bligh, Kyungmee Lee, and Murat Öztok needed to make decisions about which papers to accept or reject, was highly animated, with decisions, in several cases, requiring protracted consideration. While we were usually able to reach agreement about *scholarly quality* relatively quickly, the criterion of *alignment with the theme of the Special Issue* provoked, in many cases, difficult discussions. We were certain, however, that we wished authors to *discuss theory*, rather than merely *use* it to pursue other research objectives. On that basis, we rejected a number of pieces on the basis that, while they provided ample evidence of impressive research endeavour, we felt they could not be moulded to fit the theme of the issue. Some of those pieces may well appear in future issues of *Studies in Technology Enhanced Learning* (assuming that their authors do not publish them elsewhere first, of course!). We also agreed to accept a number of articles, but in several cases felt obliged to give a very direct ‘steer’ to authors about the direction in which they would need to take their articles for them to fit the Special Issue.

The subsequent peer-review process for full draft papers was constituted in a distinct way that attempted to respond to the remit of the journal. In particular, we aimed that each paper would be reviewed by at least one ‘established’ scholar, and at least one PhD student. Doing so necessitated running a ‘capacity building’ workshop on the topic of “Peer-reviewing for Academic Journals”², since many PhD students, while enthusiastic about participating in the peer-review process, expressed considerable uncertainty about what would be expected of them. We also wished to foster a conversation between authors, and, on that basis, asked those making submissions whether they would be prepared to review a paper other than their own.

We were particularly encouraged that, subsequently, so many individuals responded positively and promptly to our requests to serve in a peer reviewing role, and we attempted to ensure that all of those who responded were able to participate. The implications of doing so, as the development of the issue became delayed and protracted by sectoral and global disruptions (among other things, a national wave of higher education strikes in the UK, and the global Covid-19 pandemic), were that, early on, we seemed to have more reviewers than required for the submissions received, and, later on, *vice versa*. For that reason, some papers received

² A recording is available online at https://www.youtube.com/watch?v=LclQ_BX9-Bo

reviews from as many as four peers, while some reviewers ended up reviewing as many as three papers, with all peer-reviews being carried out on a double-blind basis. We would like to thank all authors and reviewers³ for the very helpful and productive way in which they engaged with the process, especially given the circumstances of life disruption (and, in some cases, serious illness) they were dealing with. Inevitably, several of those proposals we originally accepted do not appear in the final issue as full papers: with some authors (for good reasons) unable to complete their manuscripts; some feeling unable to respond to the comments of editors or peer-reviewers; and others rejected at the review stage. Once again, we thank all of those concerned, and, in many cases, we remain actively interested in hosting, in future issues, some of those pieces we have been unable to include here.

In presenting the Special Issue, as it appears over the subsequent pages, we have arranged the papers into five clusters; doing so, we hope, might assist readers to detect both the common themes and the different points of view evident within the texts. The first four of those clusters concern the topics of those full papers received: which we label, in turn, as *Thinking through particular theories*, *Theory and research*, *Theory and method*, and *Theory and practitioners*. We acknowledge that, in some cases, papers address several of those issues—they are *post hoc* narrative themes, rather than mutually exclusive categories—but, nonetheless, we hope that this tentative structuring of the issue can assist those readers who wish to engage in reading it linearly. The fifth cluster collates those initial commentaries we were able to elicit in time for their inclusion in the same issue, alongside those papers to which they respond.

We now pivot to a discussion of each cluster, in turn.

2. Engaging with particular theories

The initial cluster of papers in the issue focus, in different ways, on how *particular theories* can inform our understanding of TEL. Basing their accounts on various combinations of empirical work, critical reviews of the literature, and reflection on their own practice, each paper presents an argument about the usefulness of particular lenses for helping us to think more critically and expansively about TEL phenomena and practices. That is important, each paper argues, because ‘common sense’ thinking about TEL is so often reductive, technology-fixated, negligent of systemic and historical

³ See the *Acknowledgements* for a list of those who participated and did not request anonymity.

context, and over-optimistic.

The first paper, by Kyungmee Lee (2020), aims to introduce the ideas of Michel Foucault in a way specifically aimed at TEL researchers. Lee first sets out a brief overview of some ideas, drawn from Foucault, which, they suggest, are pertinent for those working in the field, and discusses their motivation for engaging with those ideas. They subsequently analyse 10 previously published papers, which have drawn on Foucault's work to analyse aspects of online education. Lee argues that using Foucault's ideas can be very useful, so long as it is done in a way that (1) shows due diligence to Foucault's actual concepts, and (2) pursues appropriate purposes. In particular, Lee argues that Foucault's work can assist those working in the TEL field to challenge assumptions that are, too often, simply taken for granted; to make sense of complex power relations and position those within the 'bigger picture'; and to understand the present historically—a necessity if we are to actively develop a desirable future.

The second paper, by Margaret Westbury (2020), highlights that TEL is, in many ways, a research field both concerned with and dependent on *infrastructures*, yet notices that the very notion of 'infrastructures' is routinely under-theorised. For this reason, Westbury argues that it is useful to consider how 'infrastructural theory', which has been developed in fields such as Science and Technology Studies and cultural anthropology, might be used in TEL. To do so, they use this lens to examine how academic librarians in a research-intensive UK university use the micro-blogging platform *Twitter* to create 'knowledge infrastructures'. Those infrastructures, Westbury notes, are strongly rooted in professional values and have a wide reach; but they also, in important ways, implicate complex notions of invisibility. Westbury concludes by advocating that infrastructural theory can be useful in emphasising how infrastructures and social practices mutually constitute each other, while foregrounding the degree of heterogeneity and agency inherent in their construction.

The third paper, by Rob Miles (2020), argues—or “makes the case”, as Miles puts it—for the use of Cultural Historical Activity Theory (CHAT) in TEL research. Miles argues that TEL has, too frequently, been a field dominated by “techno-centrism” and the emphasis of positive narratives, and suggests that CHAT can provide an important corrective because it foregrounds the understanding of human practices as they unfold in particular contexts. Miles acknowledges that CHAT is widely recognised as a difficult theory to learn, but argues that its advantages make the effort worthwhile. To make their case, Miles provides an overview of how they

have used CHAT in a series of research projects: each looking at students' use of laptops in pre-university English language programmes in the United Arab Emirates. Miles documents three such projects, the first two of which demonstrate the usefulness of CHAT, for TEL research, as a means of documenting the tensions and dynamics inherent in local practice. The third example is an ongoing project, in which Miles is using the Change Laboratory methodology, based on the principles of CHAT, to intervene within local practices. Miles thus argues that CHAT provides a highly developed and nuanced way not only of understanding complex social situations, but also of intervening to assist those involved to develop their own understanding and change those situations.

The fourth paper, by Sebah Al-Ali (2020), also discusses the use of CHAT in TEL research. Al-Ali's starting point is an acknowledgement that approaching theory in general, and CHAT in particular, can be a difficult and intimidating experience for what they refer to as “beginning researchers”. Al-Ali thus provides a reflective account of their use of CHAT for the first time: in a small-scale case study concerned with language teachers' use of videos as “instructional tools” in a university language bridge programme. Al-Ali documents, in turn, their initial enthusiasm, upon first encountering CHAT; the challenges they encountered when using it to support an “Activity Systems Analysis” approach to case study research; and the various “analysis revelations” with which their persistence was rewarded. Al-Ali concludes that engaging with CHAT has been important in allowing their thinking to escape from its previous “common sense box”, but that researchers should not underestimate the struggles they will encounter in grasping and applying such a complex theory in their work.

3. Theory and research

In many ways, Al-Ali's paper serves as a bridge between that initial cluster of papers and the next, which comprises papers concerned with how theories might contribute to the processes and practices of scholarship. Two further papers comprise that cluster: which focus, in turn, on unpicking how theory contributes to particular research projects; and how theory is debated and disputed in the wider TEL field.

The issue's fifth paper, by Don Passey (2020), addresses the issue of how research studies in TEL might “contribute to knowledge”, and positions theoretical engagement as central to that endeavour. Passey suggests that one core aspect of such theoretical engagement is “the definition, selection and formulation of a framework that is appropriate

and that can inform a study throughout its various phases”. To understand how researchers approach the task of doing so, it is important, Passey suggests, to distinguish between the different forms of theoretical underpinnings with which researchers might engage: namely, models, conceptual frameworks, theoretical frameworks, and theories. Passey uses this distinction to examine a range of doctoral theses in TEL—a mode of publication in the field where, of course, ‘contribution to knowledge’ is a core outcome that is explicitly assessed. Passey argues that the ways in which models, frameworks and theories are conceived and used is highly consequential for knowledge contribution, and concludes by suggesting several ways in which researchers might question their own approaches to these issues.

The sixth paper, by Brett Bligh (2020), considers the problematic relationships between theory and the TEL field, as those have been discussed and debated within the field itself. They start out by noticing that the use of theory in TEL research has long been “much criticised” and that it remains so—in their view, deservedly. Bligh contends, however, that the critical scholarship on the topic is fragmented and has (for that reason, among others) proved relatively ineffective in re-shaping or influencing the field’s research practices. Bligh thus seeks to provide a “synthesised and systematised” account of the various relationships between theory application and TEL research that are discussed in the field, in the hope that such an account might help move forward this important scholarly conversation. Bligh identifies four key areas of dispute regarding theory application in TEL. These are addressed, in turn, to the legacy of a long established theoretical canon drawn from Western academic psychology; the regrettable degree of separation between the field’s theoretical and empirical discourses; fostering greater appreciation of the wide range of functions that theory might play in research (whether in research projects, research agendas, or the field as a whole); and the extent to which the TEL field wishes to become more closely aligned, in theoretical terms, with particular, more established academic disciplines, or to view itself as theoretically ‘exceptional’. Bligh concludes by offering some observations directed at TEL researchers who might wish to engage with theoretical issues more extensively, and to those scholars for whom “theory in TEL” is a distinct research object.

4. Theory and method

While the papers in the preceding section have invoked the relationships between theory and knowledge production at a high level of analytical granularity, the subsequent papers, by contrast, consider relationships between theory

and method within particular empirical projects. Interestingly, both of the papers in this section are concerned with research that intervenes in particular research sites. Doing so, the authors contend, has a range of implications for theory application.

The issue’s seventh paper, by Julia A. McDowell and James B. McDowell (2020), explores the role of theory in design-based research (DBR): a popular methodology within the TEL field. The authors argue that DBR, whose core emphasis is the implementation and refinement of educational interventions in real contexts, permits researchers to creatively use a wide range of theory, while also necessitating that researchers consider the implications for how the theories they use are “directly and robustly” informing their intervention designs. McDowell and McDowell consider how they have used theory in two different DBR interventions: the first concerned with embedding asynchronous video tools into feedback processes, with the aim of enhancing the inclusivity of assessment for learners with Asperger’s syndrome; the second with the use of mobile learning activities in outdoor settings, whose purpose is to foster the engagement of primary school children with particular science topics. They conclude that the development and refinement of theory within successive intervention cycles is a core aspect of the “ecological validity” that exponents of DBR value so highly.

The eighth paper, by Maria Zenios (2020), also considers the role of theory in a research intervention; drawing, in this case, on a Knowledge Transfer Partnership intervention whose aim is to support the development of knowledge and skills by medical and healthcare professionals. Zenios starts out by considering a broad range of theoretical stances: including those of situated, experiential, problem-based and collaborative learning. Zenios subsequently uses those lenses to frame, in a longitudinal way, their experiences within a simulation-based training programme in a teaching hospital. One core conclusion is that such experiences emphasise how “technological innovation reshapes educational theory”. That conclusion, Zenios argues, offers a stark contrast to many existing perspectives in the area of research in which they are engaged, which more typically emphasise how theory might be harnessed to offer insights into student engagement strategies.

5. Theory and practitioners

The next section considers relationships between theory and those ‘practitioners’ with whom research in the TEL field commonly interacts. Interestingly, in each case the particular

practitioners being considered are *teachers*—whether in the compulsory education sector or in university settings. The papers highlight issues concerning how teachers are positioned by theoretical accounts, and how such theoretical TEL scholarship is perceived by those teachers who try to engage with it. In each case, a variety of problems are identified, and it is difficult to avoid the conclusion that these issues, ostensibly rather different, might, in fact, be closely related.

The issue's ninth paper, by Sejin Lee and Kyungmee Lee (2020), considers how the dominant theories used in TEL research serve to position teachers in particular ways. Drawing on concepts from the critical discourse tradition, most often associated with scholars like Michael Foucault, the authors analyse a selection of papers on technology in teacher education, and consider both the theories used and how teachers are conceived in the papers. Lee and Lee's analysis suggests that theory is primarily used to build the legitimacy of particular statements about teachers (for example, about the strategies they should use to incorporate technology), to "medicalise" particular educational phenomena (for example, by pathologising particular problems and positioning some alternative situation as 'normal'), and to expand the territory of particular findings (for example, by suggesting that research outcomes derived from one setting can be used to provide guidance about what should happen elsewhere). The authors conclude by suggesting three alternative roles that might be taken by 'disruptive theories' in TEL research: wherein the aim would be to "liberate" teachers from dominant theories and, instead, empower them to create their own possibilities.

The tenth paper, by Philip Moffitt (2020a), is the first of two papers to examine how teachers in higher education settings interact with theory in TEL. Moffitt's paper explores the perceptions of a cohort of teaching-focussed lecturers, whose own disciplinary expertise lies in infrastructure engineering. Those lecturers are asked, as part of their ongoing professional development, which focusses on pedagogical issues, to familiarise themselves with various aspects of TEL scholarship. Moffitt uses a phenomenographic approach to explore the experiences of those lecturers when they try to engage with concept-heavy materials. The result is a phenomenographic outcome space, whose four categories describe participants' interactions with such materials as a mechanism for understanding their own competence, exhibiting that competence, critiquing the change endeavours of others, and undertaking their own such endeavours. Moffitt argues that such conceptions differ in the extent to which their meaning-making is directed internally or externally, and in the "meaningfulness" of the interactions that are being described.

The eleventh paper, by Denise M. Sweeney (2020), also addresses the issue of how university teachers, within their professional development, engage with concepts from TEL. Sweeney's account is based on examining data from a module on blended learning design, an optional component of a Postgraduate Certificate in Higher Education (PGCHE) programme at a UK research-intensive university. From an analysis of participants' reflective "development reports", Sweeney concludes that, while there were certain commonalities between the materials that participants engaged with (and that, predictably, set module readings heavily influenced the accounts), there were also a number of noticeable differences. One such difference is that participants engaged in quite different ways with concepts drawn from different areas of literature: broadly, these might be characterised as concerned with 'technology enhanced learning', 'teaching and learning in higher education', and 'teaching in their own discipline'. Another finding is that those participants drawn from Engineering and Sciences disciplines, in particular, struggled to engage with the TEL scholarship and remained more fixated on work from their own particular disciplines. Sweeney concludes that TEL scholars need to communicate their conceptual ideas in ways that can more readily be "applied", since that was the characteristic shared by those materials that did evoke engagement from participants across a variety of disciplines.

6. Commentaries

The final cluster of contributions we present comprises those commentaries we were able to elicit in time for inclusion in this inaugural issue, alongside those papers to which they respond. In each case, the commentaries have been provided by individuals who were involved in reviewing the papers in the issue. We would like to reiterate that the peer review process itself used the 'double-blind' principle, and we recognised that some reviewers might feel uncomfortable with authors subsequently coming to know, as would be inevitable under the circumstances, who reviewed their paper. We were, therefore, very keen to emphasise to our reviewers that providing commentaries was an entirely voluntary exercise. Hearteningly, however, many reviewers were keen to provide such commentaries.

To enable the inclusion of a range of commentaries within the inaugural issue, those reviewers who indicated their willingness to participate were sent pre-print copies of the 'accepted' versions of those articles they had reviewed. Unavoidably, reviewers were given a very short turnaround time in which to compose their thoughts and write the commentary piece. Some reviewers who indicated their

willingness to contribute in principle were, for this reason, unable to contribute to the inaugural issue; while others had reviewed draft versions of papers that do not appear in the issue (for which, therefore, there was no ‘accepted’ version available on which to comment). We would like to thank everyone who indicated their willingness to comment for their interest and enthusiasm, and we reiterate our hope that this conversation will continue over the coming period—beyond the present issue.

Five commentaries, which we hope will assist in stimulating that ongoing conversation, appear in the present issue:

- Maria Cutajar (2020) comments on the paper by Moffitt (2020a). Cutajar provides a brief account of their own journey with phenomenographic approaches to research, and highlights that the use of such an approach has allowed Moffitt to emphasise the value of recognising the legitimacy of *conceptual uncertainty* when engaging with theory in TEL.
- Philip Moffitt (2020b), in turn, comments on the three papers by Al-Ali (2020), Passey (2020), and Sweeney (2020). Moffitt’s commentary considers how researchers gain experience in using theory, and emphasises the value of honesty throughout the process of doing so. Interestingly, like that of Cutajar, Moffitt’s commentary also highlights the value of recognising what they refer to as “ambiguity and uncertainty”, on an ongoing basis, throughout the process of engaging with theory.
- Margaret Westbury (2020b) offers a commentary on the paper by Lee (2020). Westbury emphasises the value in how Lee’s account centrally positions the issues of holism, history, and power. Westbury suggests that those concepts are both relevant and highly applicable; and, also, that the issues dovetail with problems they have been grappling with themselves, albeit using other theories. Westbury hopes that Lee’s piece “spurs a larger interest in other relevant social theorists” within the TEL community.
- Marguerite Koole (2020), in turn, provides a commentary on the paper by Westbury (2020a). Koole notices the close resonance between her own work, which uses approaches drawn from sociomaterialism, and the ideas that Westbury draws on, which are taken from infrastructural theory. Indeed, both approaches share many common underpinning assumptions and concepts, and so Koole notes that it is curious that those scholars within the TEL community who draw on the former approach seldom engage explicitly with the latter. Koole offers some comments of her own, from a sociomaterial perspective, about infrastructural theory. Koole concludes by suggesting

that closer examination of the commonalities and differences between those theories being adopted from the wider social sciences could be of considerable benefit for TEL researchers, a point that resonates closely with the argument made by Westbury in their own commentary (2020b).

- Yuhong Lei (2020) offers a commentary on the paper by Lee and Lee (2020), which draws on their own recent experiences, as a PhD student, in engaging with new theoretical works. Lei reflects that PhD students tend to approach theory with a sense of reverence, which can serve to seriously obscure their ability to appreciate how those theories are being *used* within particular narratives, in pursuit of particular agendas. Lei suggests that PhD students need to consider much more carefully what the *functions* of theory are in the pieces they are reading, and, in turn, to convey those functions more clearly in their own writing.

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