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Article

Claiming Legitimacy in the Academic Field: Chinese University TESOL Lecturers' Investment in Doctoral Learning

Jie Bao
Tianjin University of Finance and Economics, China

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Abstract
Drawing upon the theoretical framework of the investment model, the study explored two Chinese university TESOL (Teaching English to Speakers of Other Languages) lecturers' experiences of investing in doctoral studies. Following a narrative case study design, data were collected through narrative frames, in-depth interviews, and multiple follow-ups via informal communications. Analysis of the data revealed that the two focal participants reframed their projected identities and drew upon their established capital to navigate the challenges in their doctoral journey. Meanwhile, their investment in doctoral studies created spaces for them to construct a range of new capital, which allowed them to claim legitimacy within the professional context of higher education, albeit through non-linear and varied trajectories. By situating investment in learning at the intersection of capital, identity, and ideology, as informed by the theoretical framework, the study unravelled the complexities of in-service teachers' pursuit of further doctoral education and the impact of doctoral education on TESOL lecturers' ongoing professional identity constructions. The study offers implications for the continuing professional development of TESOL lecturers in China and beyond. It also serves as an important empirical reference for institutional policymakers and doctoral program designers on how to better support in-service teachers' engagement in further doctoral learning.

Keywords
Chinese university TESOL lecturers, doctoral learning, professional development, higher education, investment model

1 Introduction

In TESOL (Teaching English to Speakers of Other Languages) literature, a recurring theme is concerned with TESOL teachers' legitimacy issues, as reflected in numerous studies on non-native English-speaking teachers' vulnerability and coping strategies within native speakerism ideologies (e.g., Ershadi et al., 2024; Wolff & De Costa, 2017), student and novice teachers' struggles over gaining legitimacy and

Email: amy-jie.bao@connect.polyu.hk

autonomy in hierarchical institutional cultures (e.g., Chang, 2018; Kanno & Stuart, 2011), and the power negotiations between TESOL teachers and researchers against the backdrop of the teaching-research divide (e.g., McKinley, 2019; Sato & Loewen, 2019). Claiming a legitimate identity within shifting institutional ideologies in their situated professional contexts is something teachers do throughout their careers (Day et al., 2006), as it enables teachers to implement their teaching philosophies, exert positive influence on their students, and find meaning and worth in their professional lives. With the aim of extending this line of research, this study examines how the underrepresented group of Chinese university TESOL lecturers negotiate their legitimacy in their professional context through investment in further doctoral learning.

TESOL lecturers represent a special professional group in mainland Chinese universities. Due to historical reasons such as the national agenda of achieving internationalization through the massification of English education (Hu & Lei, 2014), many TESOL lecturers have been recruited as faculty members in Chinese higher education to teach foundational English courses in undergraduate programs. As traditionally teaching-focused academic staff, a large proportion of them, especially those in mid-career, do not receive doctoral education and are research-inactive (Bao, Feng, & Hu, 2024). With Chinese higher education's rapid shift towards a research-oriented institutional culture over the past decade (Teng, 2024), TESOL lecturers' legitimacy as academic staff has been increasingly questioned (Bao & Feng, 2023). Specifically, viewing the professional context of higher education as an 'arena' or 'field' (cf. Bourdieu, 1990; Liu, 2023a), where research serves as the primary marker of power and legitimacy, TESOL lecturers without a doctoral degree and with limited research output often position themselves—and are positioned by others—as not fully legitimate members. They occupy a lower position in the academic hierarchy and are frequently denied the right to speak and be heard in the academic field (Zeng & Fickel, 2021).

Although many of these lecturers hold permanent contracts gained prior to the widespread adoption of the 'up or out' recruitment model in Chinese higher institutions, they are increasingly pressured by the now-prevalent neoliberal performative institutional logics, wherein academic staff are encouraged to continuously add value to themselves and to compete with others (De Costa et al., 2019). Consequently, many feel compelled to invest in further doctoral learning, which they viewed as a pathway to professional development, promotion, and the reconstruction of a more legitimate professional identity (Bao, Feng, & Hu, 2024). Compared with traditional doctoral students who pursue the doctorate as a pre-service training for academic positions, in-service TESOL lecturers who return to doctoral learning after years of teaching "are not a blank slate" (Clouder et al., 2020, p. 1769). The multiple roles they take before and during their doctoral learning, together with the capital they have accumulated in their professional experiences, may interact with their doctoral learning in complex ways and bring both challenges and affordances in their pursuit of professional development through doctoral learning (Bao, Feng, & Hu, 2024). How they negotiate their identities and capital can further influence whether and how their investment in doctoral learning leads to the construction of their desired legitimate professional identities. By understanding the complexities of in-service TESOL lecturers' pursuit of legitimacy through further doctoral learning, the study contributes to the international literature on TESOL teachers' professional development and offers insights for the continuing training of TESOL lecturers in China and beyond.

Therefore, the study draws upon the investment model developed by Darvin and Norton (2015) to examine Chinese TESOL lecturers' experiences of investing in doctoral learning. Conceptualizing learning as an investment to claim a legitimate place within specific social and institutional contexts (Darvin & Norton, 2015; Liu & Darvin, 2024), the investment model provides an apt lens for achieving a holistic understanding of the complex process of TESOL lecturers' construction of legitimacy through doctoral learning. Specifically, the study seeks to answer two questions: 1) How do Chinese university TESOL lecturers negotiate their identities and capital when investing in doctoral learning? 2) To what extent does investment in doctoral learning enable them to claim legitimacy in the field of higher education?

2 Literature Review

2.1 TESOL lecturers in the changing landscape of Chinese higher education

In mainland Chinese universities, TESOL lecturers make up the largest professional group (Zeng & Fickel, 2021). Due to the high demand for English language teaching staff following the nation's massification of English education at tertiary level, many TESOL lecturers have been recruited as faculty members without having obtained a doctoral degree (Bao, Feng, & Hu, 2024), which is often considered a pre-career qualification for faculty positions in higher education. The lack of systematic research training, intertwined with other pragmatic constraints such as heavier teaching loads, hinders their research productivity (Bao & Feng, 2023). Despite their limited research output, they used to enjoy some autonomy in pursuing a teaching-oriented professional trajectory and occupy an indispensable professional status, largely due to the cultural capital associated with English (Liu, 2023b). As teachers of the global lingua franca, they played a crucial role in the national agenda of modernizing China by equipping students with the language skills necessary for engaging in global communication.

However, their professional autonomy and status have been undermined by shifting ideologies in Chinese higher education. Along with China's unprecedented economic growth, the government has been eager to enhance its global standing through building world-class research universities (Gao & Zheng, 2020), leading to performative institutional cultures. Performance metrics, characterized by the quantification of qualifications and research outputs, are adopted to continuously audit and evaluate the performance of academic staff, underpinned by the neoliberal mantra of "raising standards" (Block et al., 2012, p. 120). Within this one-sided institutional logic of credentialism and research prioritization, traditionally teaching-focused, non-doctoral TESOL lecturers face significant challenges in claiming legitimacy in the professional community of higher education. As reported in a surging line of literature (e.g., Bao & Feng, 2022, 2023; Huang & Guo, 2019), TESOL lecturers have experienced professional development quandaries and identity tensions, generating feelings of being "academic outcast" in the ivory tower of higher education (Bao & Feng, 2023, p. 5). Their career advancement dilemmas, stemming from their less productivity in research, could further undermine their legitimacy in teaching, as university teachers with lower academic ranks are often less trusted to teach higher-level courses (Bao & Feng, 2023), have less autonomy in shaping their teaching content (Bao, Hu, & Feng, 2024), and are less likely to exert significant influence on their students (Strauss, 2020).

In response to these challenges, many TESOL lecturers have turned to further doctoral education to add a research dimension to their professional identities and (re)gain legitimacy in the academic field (Bao, Hu, & Feng, 2024). However, despite the growing number of TESOL lecturers pursuing further doctoral education for professional development, few studies have explored this emerging phenomenon. To address this gap, this study uses the investment model to examine TESOL lecturers' further doctoral learning, framing their investment in doctoral learning as a complex social process that involved the interplay between identity, capital, and ideology.

2.2 Doctoral learning as a pathway to professional development and legitimacy acquisition

For teachers in both general education and TESOL education, pursuing in-service doctoral learning offers a pathway to continuing professional development, as it provides opportunities for teachers to expand their knowledge base, enhance their research skills, gain autonomy, and become critical inquirers of their own professional practices. For example, Kowalczuk-Walędziak et al. (2017) explored the experiences of Polish and Portuguese teachers engaged in doctoral learning, suggesting that doing a doctorate enables teachers to acquire unique educational knowledge, develop criticality of their work, and enhance their professional practices. Similarly, examining a European doctoral program tailored for in-service teachers, Symeonidis and Schratz (2022) found that doctoral learning empowers teachers to claim a degree of professional autonomy and integrate a research dimension into their professional identities.

Unlike school teachers, teachers working in higher education often have a greater need to pursue a doctorate, as it serves as a key marker of legitimacy in their professional context, especially within the neoliberal metrics-driven milieu of contemporary higher education (De Costa et al., 2019). With a doctoral degree now becoming the sine qua non for faculty positions, teachers hired without one have gradually found themselves in a peripheral position within the higher education community, often relegated to the status of "second-class citizen" (Billot et al., 2021, p. 441). As such, pursuing a doctorate for non-doctoral university teachers is not only about achieving voluntary professional development, but also about gaining legitimacy and security in their professional contexts. For example, Dann et al. (2019) found that gaining a doctorate could legitimize university lecturers' pedagogical practices and alleviate their imposter syndrome. Relatedly, Dai et al. (2021) argued that a significant motivation for non-doctoral teachers to pursue a doctorate is to meet the increasing institutional requirements for staff qualifications and to compete with the expanding pool of fresh doctoral graduates to maintain their academic positions. Focusing on cultivating the ideal researcher-teacher identity in higher education, Bao, Hu, and Feng's (2024) study explicated how investment in doctoral learning creates opportunities for teachers to move beyond their original 'follower' roles and assert the right to shape their own classroom practices.

While acknowledging the potential benefits of doctoral learning, gaining professional development and legitimacy through pursuing a doctorate may not follow a linear route and could instead be "an area of profound struggle" between affordances and constraints (Dann et al., 2019, p. 1180). Teachers who return to doctoral learning after years of professional experiences have established a set of capital, which can either facilitate or impede their doctoral progress, depending on the intersecting ideologies of their workplace context and doctoral learning context, as well as their negotiations of their multiple roles and capital. On the one hand, as an array of studies have suggested (e.g., Clouder et al., 2020; Li et al., 2017), the skills and capabilities teachers have developed as experienced practitioners may go unacknowledged in their continuing research education or even contradict literary practices in academia. On the other hand, inhabiting multiple roles can also be leveraged as an advantage, especially when teachers skillfully negotiate their previously accumulated capital with art and craft. As mentioned in the existing literature (e.g., Bao, Feng, & Hu, 2024; Billot et al., 2021; Boncori & Smith, 2020), drawing upon their prior and ongoing work experiences in higher education, teachers develop insider knowledge about academia, which can inform their communication with their supervisors, enable them to seek resources and tools beyond the doctoral program, and thereby enhance the efficiency of their doctoral learning. Despite these insights gained from the current literature, we still lack a focused and contextualized understanding of how teachers returning to doctoral education navigate their doctoral learning and how they leverage their learning to negotiate their professional legitimacy, especially through a model that enables sensitivity to the complex interplay between personal motivation, professional experience, and institutional ideologies.

3 Theoretical framework: The investment model

The study draws upon Darvin and Norton's (2015) investment model to explore Chinese university TESOL teachers' participation in doctoral learning. Originally proposed to complement the psychological construct of motivation, investment is sociological and focuses on how participation in learning as a social practice is shaped by learners' lived experiences, relationships, and the dynamics of their situated cultural contexts (Darvin, 2019; Darvin & Norton, 2023). Learning is thus influenced not only by learners' internal drives but also by external social factors, such as the contextual affordances they could draw upon in their learning and the potential social benefits their learning may bring.

In Darvin and Norton's (2015) model, investment is placed at the intersection of identity, capital, and ideology. Originating from her earlier works on identity and imagined communities (e.g., Kanno & Norton, 2003), Norton conceptualized investment in learning as being closely intertwined with the negotiation of identities to attain a legitimate place within imagined communities. Acknowledging its multiple and dynamic nature, Norton (2013) defined identity as "how a person understands his or her

relationship to the world, how that relationship is structured across time and space, and how the person understands possibilities for the future" (p. 45). In their investment in learning, learners revisit and redefine their sense of who they are, what they can do, and who they can become in the future (Norton Peirce, 1995). In other words, investment in learning involves a process of negotiating identities, driven by learners' desire, imagination, and aspiration for the future (Darvin & Norton, 2015; Liu et al., 2024). In various sociocultural communities where implicit or explicit power differentials exist, learners' imagined identities are often associated with gaining the legitimacy, the negotiation power, and the right to speak. For example, in their ethnographic case study, Liu and Darvin (2024) found that through investment in informal language learning in the digital wilds, university students from underprivileged rural Chinese families could redefine their rural and marginalized identity and construct themselves as legitimate English language speakers in metropolitan university settings.

Capital, a concept originates from Bourdieu's (1986) work, refers to various forms of resources that individuals can possess and utilize to gain advantages in society. Economic capital (i.e., what one owns), cultural capital (i.e., what one knows), and social capital (i.e., who one knows) together constitute an individual's position in the social world (Darvin & Norton, 2023). When a form of capital is legitimized or valued within a particular sociocultural community, it becomes symbolic capital. According to Darvin and Norton (2015), individuals invest in learning "not only because they desire specific material or symbolic benefits, but also because they recognize that the capital they possess can serve as affordances to their learning" (p. 46). As learners venture into new territories, they need to acquire new capital whilst negotiating and transforming their existing capital to construct their desired identities. For example, in Jiang, Yang, and Yu's (2020) study, a minority student who was previously disempowered in her English learning experience developed into an active English learner through building new competence in digital multimodal composing and capitalizing on her original ethnic knowledge. Her enhanced identity and capital further encouraged her continued investment in learning English.

Investment is also shaped by ideology, which could be understood as "the dominant ways of thinking that organize and stabilize societies while simultaneously determining modes of inclusion and exclusion" (Darvin & Norton, 2015, p. 72). Ideologies are power-laden and often manifest as sociocultural and institutional norms and regulations. As "the rules of the game" (Darvin & Norton, 2015, p. 44), ideologies influence individuals' investment in certain practices by determining which identities are considered legitimate or illegitimate and which types of capital are valued or devalued. Meanwhile, despite the power of ideologies, individuals can also exercise their agency to negotiate unequal relations of lower and subvert the ideological structure, thereby asserting their own desired identities across social spaces (e.g., Liu, 2025). For example, focusing on the experiences of Asian immigrant students in the Singaporean school context, De Costa (2016) found that the participant students responded differently to the dominance of the Standard English ideology. While some embraced the monoglot ideology and invested in the school-expected literacy practices to construct a model student identity, others resisted this ideology and chose to use local English (i.e., Singlish) to construct a sense of belonging within the local community.

The investment model can be extended to examine language teachers' learning and identity development. On the one hand, this is supported by the model's initial inclusion of teachers during its early conceptions. Norton and Early (2011) explicitly stated that, the model "can be equally applied to a language teachers' investment in a new research project, pedagogical practice, or training initiative" (p. 422). In other words, investment can be used as a theoretical lens to examine teachers' engagement in learning or other practices. On the other hand, the model has already been applied in empirical studies on teachers' investment, demonstrating its theoretical inclusivity towards teachers. For example, Jiang, Yu, and Zhao (2020) used the model to explore how a teacher's investment in using digital multimodal composing as an instructional activity led to her renegotiation of teacher identities. Similarly, Stranger-Johannessen and Norton (2017) used the model to examine Ugandan school teachers' investment in a digital initiative that promotes multilingual literacy for African children. In a more recent study, Zhang

and Darvin (2025) employed the model to explore how gender ideologies in the Chinese context shaped pre-service teachers' investment in their learning and teaching practices.

Extending Norton's (2013) original theorization of investment as language learners' socially and historically shaped engagement in learning the target language, I view teachers' engagement in further doctoral learning as similarly influenced by an array of social and contextual factors. Their investment in doctoral education, therefore, goes beyond mere personal motivation; it is shaped by the capital they possess or can negotiate, the capital they desire to acquire, their imagined identities, and the shifting ideologies embedded within their situating contexts. In particular, within the neoliberal metrics-driven ideologies prevalent in the academic field, they aim to acquire the doctoral title as a symbolic capital that qualifies them for academic roles. They also seek to cultivate the cultural and social capital associated with producing research outcomes. These forms of capital will help them claim a legitimate professional identity. During their journey of gaining new capital through doctoral learning, the skills, knowledge, and experiences they have amassed as established teachers serve as the capital they bring with them, which can be either valued or devalued by the prevailing ideologies in their doctoral learning system. By negotiating their existing capital and acquiring new capital, teachers move towards (or away from) their desired identities. Viewing learning as intertwined with various internal and external factors such as personal histories, power dynamics, and individual agency, the investment model offers an apt lens for examining the complexities of in-service teachers' further doctoral learning.

4 Methodology

The study adopts a narrative case study design (Brandell & Varkas, 2010), which combines case study and narrative inquiry. While case study allows for an in-depth analysis of the complex phenomenon of TESOL lecturers' doctoral learning within its social context (cf. Duff, 2012), narrative inquiry highlights participant voice and enables an understanding of how teachers give meaning to their experiences of investing in doctoral learning (cf. Barkhuizen, 2015).

4.1 Participants

Purposeful sampling was used to recruit information-rich participants, based on three sampling criteria. First, participants had to be mid-career TESOL lecturers with at least five years of work experience so that they had formed an in-depth understanding of their profession and the prevalent ideologies in their work institutions. Second, they had completed or were pursuing a doctorate for continuing professional development. Third, they had to be senior or recently completed doctoral students so that they had developed a thorough understanding of their doctoral journey and the impact of the doctorate on their profession. Through my personal networks, I identified Sunny and Liang, who met the sampling criteria and showed interest in participating in the study.

Although Sunny and Liang were enrolled in different programs, they both studied as part-time doctoral students in professional doctoral programs, which are designed for experienced practitioners (Bourner et al., 2001). Operating on a flexible mode, these programs generally consist of a coursework section and a capstone thesis section. Students can identify a suitable supervisor for their capstone thesis after completing the coursework. Sunny had worked as an English lecturer in a private university for nine years. She began her doctorate in applied linguistics in the fifth year of her career and had just completed her doctorate at the time of data collection. Liang had taught English in a normal university for ten years and began his doctorate in education in the fourth year of his career. At the time of data collection, he was in his sixth year of doctoral studies and was writing his capstone thesis. Both participants gave informed consent to participate in the study.

4.2 Data collection

Data were collected through narrative frames (NFs), interviews, and multiple follow-ups via informal communications. By giving sentence starters and hints as scaffolds, NFs provide "guidance and support in terms of both the structure and content of what is to be written by helping teachers to recount their experiences" (Barkhuizen & Wette, 2008, p. 376). Guided by the theoretical framework and the existing literature on university lecturers' participation in doctoral learning for professional development (e.g., Bao, Feng, & Hu, 2024), I designed the NFs to gather information about the participants' professional work and doctoral learning, the institutional expectations in their professional contexts, their motivations for doing a doctorate, the challenges they encounter and their coping strategies, and the benefits of doing a doctorate.

After the retrieval of the NFs, I conducted semi-structured interviews with each participant, during which I asked them to explain and expand on their responses to the NFs in greater detail. Participants were also encouraged to talk about topics not covered in the NFs but related to the research questions. Each interview lasted around 90 minutes. In addition to the interviews, I conducted several rounds of follow-up inquiries with both participants. These follow-ups were made through informal communications. As a data collection method with the same validity and epistemological status as formal interviews (Swain & King, 2022), informal communications not only allowed for flexibility but also enabled me to collect more spontaneous data from my participants, as participants tended to be less reactive in informal communications. In these follow-ups, I asked for their clarification and addition of key information. I also invited them to check and confirm my interpretation of their experiences and provide additional insights, thereby enhancing the trustworthiness of the study through respondent validation (Webster & Mertova, 2007).

4.3 Data analysis

Data analysis followed two major steps: thematic analysis to identify themes and narrative re-storying of each participant's lived experiences. The first step entailed looking for themes in the narrative data. Following Braun and Clarke's (2006) recommended procedures in thematic analysis, I transcribed the data collected through the NFs, the interviews, and the informal communications, and familiarized myself with each participant's narratives through multiple readings. I then coded critical and interesting data segments relevant to the research questions (such as adaptation to doctoral learning, changing identities and practices, and gains from doctoral learning). Codes were then collated and categorized to develop potential themes. At this stage, I referred to the concepts in the investment model to refine the codes and themes. For example, Sunny's recount of how she drew upon her prior knowledge about interacting with students to inform her communications with her supervisor was coded as "using cultural capital (i.e., soft skills) to improve supervisory interactions". This was later subsumed under the theme of "negotiating her identities and capital to advance her doctoral progress". Guided by the research questions, two themes were generated for each participant, outlining: 1) how they negotiate their identities and capital in their doctoral learning; and 1) how they leveraged doctoral learning to address issues of professional legitimacy.

The second step of the analysis was to re-story each participant's experiences of doctoral learning through the "specific analytical agenda" (Consoli, 2021, p. 2) of the investment model. Specifically, I constructed storylines for each participant in relation to the identified themes, weaving their narratives into the storylines and interpreting their experiences through the investment model. A narrative report was generated for each participant, which detailed their motivations for pursuing a doctorate, their learning trajectories, their negotiations of identities and capital, and the impact of their doctoral learning on their professional development and legitimacy.

5 Findings

5.1 The case of Sunny

For Sunny, pursuing a doctorate had been an aspiration she pondered as early as her master's studies, when she had an opportunity to pursue her doctorate at an overseas university. However, born into a traditional family, she conceded to her parents' advice to find a stable job and start a family upon completing her MA. As she recalled, "I followed my parents' arrangements. As a fresh graduate, I was not financially able to support my doctoral studies" (Sunny-Interview). With her dream of pursuing a doctorate compromised by her lack of economic capital, Sunny started her career as a TESOL lecturer in a private university and spent the initial years honing her teaching skills. As she gradually established herself as an experienced teacher, her nascent aspiration to pursue doctoral studies was reignited not only by her prior personal motivation but also by her institution's fervent push for academic staff to enhance their qualifications. The institutional push was reflected in her account of the university's continual comparison of academic staff based on their qualifications, a typical governance strategy in neoliberal performative universities (De Costa et al., 2019). As she mentioned, "Every semester, the dean would release a ranking based on our academic rank and qualifications. As a teacher without a doctoral degree, I often found myself ranked at the lower end" (Sunny-Interview). To establish her legitimacy and gain a foothold, Sunny enrolled in a professional doctoral program in applied linguistics in the sixth year of her work, after having accumulated enough economic capital to support her studies.

5.1.1 Negotiating her identities and capital to advance her doctoral progress amid multiple commitments

As an experienced teacher, Sunny joined the professional doctoral program with the ideal of learning how to conduct pedagogical research. According to her, although language teaching was not her research area during her MA, she intended to pursue this new area because "it is not only concerned with building research capacity, but also with building research capacity that will feed back into teaching" (Sunny-Informal Communication). However, this envisioned researcher-teacher identity was gradually compromised by the multiple commitments Sunny had to manage in her dual roles as a full-time teacher and a part-time doctoral student. After teaching twelve hours each week to fulfil her job responsibilities, Sunny felt deprived of adequate time for doctoral studies, which is a common challenge reported in studies of on-the-job doctoral students (e.g., Bao, Feng, & Hu, 2024; Smith et al., 2020). Although she tried to juggle both roles by sacrificing her personal and rest time, she often found herself on the verge of burnout, especially when she was trying to venture into a new research area. As she mentioned:

> Preparing for lessons and teaching is time-consuming, leaving me to sacrifice my sleep and weekends for my doctoral studies. In the first year of the doctorate, I took two courses on second language acquisition and research methods in education, and attempted to write a research proposal for conducting a teaching experiment related to my own classroom practice. However, those two courses were very challenging for me to understand. I shared my research proposal with potential supervisors, but the feedback was not very positive. My understanding of the theories and concepts was superficial. I felt frustrated, realizing that switching to a new area without sufficient learning time is beyond my reach. (Sunny-Interview)

Having realized the competing demands of maintaining a full-time job while delving into a new research area, Sunny decided to compromise her original aspiration of becoming a researcher-teacher who can well integrate research with teaching. Instead, she focused on finding an optimal path to complete her doctorate first, since a doctoral title is a key symbolic capital valued by the metrics-driven institutional ideologies and would guarantee her survival in the competitive higher education marketplace. As she

commented, "Half of my non-doctoral colleagues have either completed or are currently pursuing a doctorate. I have to finish mine on time to secure my position" (Sunny-Informal Communication). With this new goal of on-time completion, which she negotiated after pragmatic considerations, Sunny resumed her original research area of Critical Discourse Analysis (CDA). This allowed her to draw upon the cultural capital she had amassed during her MA studies—her knowledge of CDA and her experiences in conducting CDA research—to inform her ongoing doctoral learning, which "saved [her] from the excessive amount of reading in a new field and ameliorated [her] feelings of frustration and burnout" (Sunny-Interview).

Despite her initial struggles with her research area during the first year of her doctoral studies, Sunny found her footing after settling on her research topic and a matching supervisor. When trying to identify a suitable supervisor, she drew on the cultural and social capital she had accumulated from her past study and work experiences, which included her keen judgement about what makes a good supervisor and her insider knowledge of the reputations of key figures in the field. As an experienced teacher herself, Sunny was savvy in choosing the right supervisor. Referring to her insider knowledge of the field, she found a supervisor who is not only a renowned scholar in the field of CDA but also has a good reputation for supporting his doctoral students. As she explained, "I've known his name since my MA studies, when I read and cited his articles in my MA thesis. I've also heard about his reputation as a helpful supervisor from my MA supervisor and colleagues I met at conferences" (Sunny-Informal Communication).

In addition to finding a suitable supervisor, Sunny also applied her well-established knowledge about teacher-student interactions, a form of cultural capital, to enhance her communication with her supervisor. Reflecting on her concurrent identity as a teacher supervising undergraduate students in their capstone theses, Sunny gained insights into what makes effective student-teacher interactions and which types of students are likely to earn favor and resources from the teacher. Guided by these insights, Sunny avoided asking her supervisor self-evident questions. Instead, she demonstrated her independence in learning and reserved the supervision meetings for meaningful and effective discussions. She also took a proactive role in negotiating her study plans with her supervisor and managed to follow the plans they had discussed and agreed on. According to her, she strived to construct an ideal doctoral student identity shaped by the perspectives she developed from her teacher identity.

> I understand what makes a good student in teachers' eyes. When supervising undergraduate students, I've met students who ask questions they could easily resolve on their own. I wouldn't trust these students with important tasks. Therefore, when meeting with my supervisor, I avoid simple questions and focus on in-depth discussions about the significant issues in my thesis. By doing so, I establish myself as an independent and capable doctoral student. Another key is arranging and adhering to my study plans. Having been frustrated by my own students missing deadlines, I ensure I don't do the same with my supervisor. I show myself as a dependable student. (Sunny-Interview)

Sunny's efforts fostered a favorable supervisor-student relationship, which is highly valued in the doctoral learning context where supervisory interactions play a crucial role in shaping students' academic progress (Bao et al., 2025). Through constructing herself as the ideal doctoral student, Sunny gained "effective supervisory guidance and potentially more collaboration opportunities with her supervisor in the future" (Sunny-Informal Communication), which facilitated the smooth progression of her doctoral studies.

5.1.2 Using the doctorate to alleviate her anxiety and legitimize her place at her institution

As a teacher without a doctorate or a professorial title, Sunny used to describe her professional status at her institution as "dispensable and at the lower end of hierarchy" (Sunny-NFs). With a feeling of illegitimacy in the higher education community, she used compliance as a strategy of survival and was

constantly anxious about her performance. She mentioned having no negotiation power over course arrangements and was often assigned to teach large classes or new courses that senior rank teachers had passed over. According to her, "It is a hidden norm that lower-rank, non-doctoral teachers have little right to choose courses. We are expected to be cooperative and compliant" (Sunny-Interview).

Sunny also mentioned being oversensitive about students' evaluations and teaching supervisors' comments on her class performance because teaching was the major site where she could prove her worth to the institution. Worried about her job security and career prospects, Sunny constantly questioned whether she was performing well enough in her teaching and whether she had satisfied the students and the teaching supervisors.

> I often suffered from insomnia the nights before my lectures, going over the details of the upcoming classes in my mind. When students were not engaged in my classes, I felt nervous and worried about my teaching evaluation scores. The scores are very important for teaching-focused lecturers at my institution. Audits from supervisors also made me uneasy. They are usually professors, but not necessarily from a language teaching background. While I didn't agree with all their comments, I lacked the confidence to argue and always followed their advice. (Interview-Sunny)

After completing her doctorate, Sunny felt "much more relieved and relaxed when preparing and delivering lectures" (Sunny-Informal Communication). The doctorate gave her the confidence to lead her own classroom and legitimized her lecturer role. She still attended to students' involvement in her lectures as well as feedback from students and teaching supervisors, but she now approached them with her own critical judgements. She recounted an example of how she handled students' feedback differently before and after her investment in gaining a doctorate. Empowered by her doctorate, she was able to uphold her own teaching philosophies and became more assertive in shaping the students' learning behaviors.

> I teach English writing. I believe that writing can only be improved through practice. However, some students dislike the assignment workload and give me low scores in teaching evaluations. I used to feel uneasy about the scores and even attempted to reduce the workload to please the students. Now I feel less panicked by the scores because I've grown more confident. I share my own doctoral writing experience with the students, showing them the importance of practice in writing. They gradually accept the workload. I guess it's the doctoral title and the experience of pursuing a doctorate that make my words more persuasive to the students. (Sunny-Interview).

Although Sunny had not yet produced any solid research outputs—the capital valued by prevalent institutional ideologies—the doctoral title itself served as symbolic capital that helped legitimize her place at her institution, at least temporarily. Compared with teachers who had not yet started or were still pursuing their doctorate, Sunny viewed her newly acquired doctoral title as a certification of her lecturer role. It also served as a buffer that allowed her time and space to accumulate the capital of research outputs. Specifically, the cultural and social capital she gained during her doctoral studies, including the research knowledge, skills, and networks, enabled her to envision her future acquisition of institutionally valued capital of research outputs. In other words, the cultural and social capital she gained through doctoral learning made a researcher identity imaginable, contributing to her growing sense of legitimacy in the academic field. As she commented:

> Teaching in higher education without a doctorate feels like swimming in the sea. With a doctorate, I feel safe on the shore now. Of course, this could only last for a few years in today's competitive environment. I still need publications and research grants in the coming years. With what I've learned during the doctorate and the support from my supervisor, hopefully I can produce some solid outputs and establish my position in academia. (Sunny-Interview)

5.2 The case of Liang

Liang chose the profession of university TESOL lecturer due to his great passion for teaching. His teaching performance has been exceptional at his institution, earning him high student evaluations, teaching awards, and institutional commendations. Similar to Sunny, Liang's investment in doctoral learning was primarily driven by his institution's heightened requirements for staff qualifications. As he explained, "I was among the last batch of teachers hired as faculty members without a doctorate. I need to complete a doctorate if I want to gain a foothold in higher education" (Liang-Interview). In the fourth year of his career, after making substantial contributions in teaching and professional service, Liang felt he had earned institutional recognition for his competence and dedication to teaching, a form of symbolic capital that solidified his position as a reliable and excellent teacher. With this capital, he was able to negotiate with his institution for a study leave to pursue a doctorate. According to him, "Although the institution strives to enhance the profile of academic staff, not every non-doctoral teacher can be granted leave for further studies" (Liang-Interview). Liang's devotion to work over the years earned him a one-year leave for his doctoral studies, leading him to choose a professional doctoral program that operates on a flexible study mode. He utilized the one-year leave to complete all his coursework and returned to work while writing his thesis.

5.2.1 Negotiating his identities and capital to counteract the constraints in his doctoral learning

In the early stages of his doctoral studies, Liang sought to establish an in-group identity within a research community composed of doctoral supervisors and doctoral peers, whereby he could leverage the social capital rendered by his doctoral studies to socialize himself into the academic community. He also envisioned leveraging the social capital of doctoral connections to foster research collaborations that would lead to tangible research outputs. Having observed the trajectories of successful academics, he noted that "networks developed during one's doctorate are important for research outputs, as they bring supervisory guidance, peer support, and collaboration opportunities" (Liang-Interview).

However, this ideal was soon challenged by the fact that he was a part-time doctoral student. With a full-time job in another city, Liang could only occasionally travel to the university for his doctoral program after completing the coursework in the first year. Unable to be physically present for his doctoral studies, Liang mentioned "missing out on opportunities for supervisory interactions and feeling alienated from the doctoral community" (Liang-Interview). To overcome this endemic alienation from research culture experienced by many part-time doctoral students (Dann et al., 2019), Liang tried to expand the doctoral space by utilizing the resources available to him while simultaneously striving for an independent doctoral student identity. Working at a leading normal university, Liang developed acquaintances and friendships with some of his research-active colleagues, who had completed their doctorates and become full-fledged academics. This social capital he had amassed during his years of work enabled him to seek collaboration and mentoring opportunities beyond his doctoral program. Liang recounted his experience of joining the research team of Professor Z, a well-established professor in his research field and a long-time colleague.

> Professor Z is a colleague in my department. We've known each other since I joined the department. She was leading a national research project and was recruiting team members to collaborate on it. Recognizing me as a hard-working and dependable colleague through our work contacts, she invited me to participate. We completed the project and published a co-authored paper, through which I gained many insights for my own doctoral studies. Through our discussions about the research project, I developed my research competence. She was like a supervisor to me. (Liang-Informal Communication)

While the social capital Liang accumulated through his work experience helped him navigate the constraints of his doctoral studies and facilitated the development of his research competence, it is

interesting to note that the research collaboration opportunities in his workplace context were also enhanced by the cultural and symbolic capital he developed through his doctoral studies. Besides his reputation as a hard-working and dependable colleague, Liang mentioned that "a key factor for getting enrolled into Professor Z's research team was [his] data analysis skills developed in doctoral coursework" (Liang-Informal Communication). Such cultural capital gained through his doctoral learning enabled him to become a valuable member of the team. On a more nuanced level, in the Chinese higher education context where many TESOL lecturers still do not hold a doctorate (Zhang et al., 2024), pursuing further doctoral education is often valued as a symbolic capital, which manifests proactivity in continuing professional development. Liang's status as a doctoral student in a prestigious program demonstrated his intention to pursue professional development and achieve career excellence, making him a suitable candidate for research collaborations and projects at his institution. He mentioned being recruited for several projects by established academics in his department. As he remarked, "Pursuing a doctorate shows that I'm still striving to excel rather than just 'lying flat' (withdrawing from professional development). It gives you a ticket to the department's research activities" (Liang-Interview).

Apart from actively seeking and leveraging networks and support beyond his doctoral program, Liang also strived to cultivate an independent doctoral student identity. Studying remotely, he redefined his originally envisioned apprentice identity, where his supervisor could guide him through every step of the doctoral research. Although his supervisor was timely in responding to emails and online meeting requests regarding his thesis, the lack of regular in-person meetings and opportunities for informal interactions hindered the intensive supervisory guidance typical of the traditional "apprenticeship model" in doctoral education (Bastalich, 2017). According to him, "While my supervisor always provides guidance when I ask, he seldom pushes me or sets plans for my progress. Full-time doctoral students are more likely to meet their supervisors regularly and work under closer supervision" (Liang-Interview). Acknowledging the lack of supervisory interactions due to the long-distance study mode, Liang reconstructed himself as an independent doctoral student who assumed full accountability for his doctoral progress and research outputs. Although the laissez-faire supervision was not his initial preference, it granted him the academic freedom to explore areas of his own research interests. Drawing upon his own identity as a teacher from a rural background, Liang chose to study the professional development of rural language teachers and utilized his personal networks to recruit participants for his thesis project. As he recounted:

> It's common for doctoral students to choose topics related to their supervisors' ongoing projects. This allows them to use established frameworks and draw upon their supervisors' resources. I initially preferred this approach, as it may be more effective for doctoral progress and research output. However, I've come to appreciate the benefits of being independent. I can now answer my own research questions and quench my own academic curiosity. Doing a project related to my own identity also enables me to use the experiential knowledge and the social networks I've developed in my past. (Liang-Interview)

5.2.2 Using the doctorate to legitimize his pedagogies and curate his academic identity

Although Liang's doctoral journey is not yet complete, the capital he has accumulated through his doctoral learning has already begun to impact his professional work. Despite his reputation in teaching, Liang used to rely on his intuition and experience in his pedagogical practices. The theoretical knowledge he had gained from his one-year, coursework-based MA studies were not sufficient for designing theory-based teaching. He thus often found himself in a paradoxical situation where his highly successful classroom practices did not translate into grants for teaching-research projects or teaching innovation awards. In the higher education context where theory-informed knowledge production is valued (Tight, 2016), getting these grants required not only excellent teaching performance but, more importantly,

systematic justifications of the lecturer's teaching philosophies and teaching designs. Lacking in-depth understandings of the theories, he found it difficult to legitimize his pedagogical practices within the scholarly context.

> I know how to teach effectively, but I struggle to explain why my pedagogical practices work from a theoretical standpoint, such as applying theories to inform and justify my methods. Despite the popularity of my courses, I've failed several times when competing for teaching-research projects and teaching innovation awards. Reviewers always commented that my teaching proposals 'lacked theoretical footing and rigor'. (Liang-Interview)

In his doctoral learning, Liang was provided with structured trainings to accumulate the knowledge and skills necessary for bridging the theory-practice gap in his teaching. The intensive and systematic coursework in his doctoral education was "far more effective than sporadic lectures and training workshops in short-term teacher development programs" (Liang-NFs). As a doctoral student in education, Liang delved into courses such as *Language Education Theories* and *Research Methods*. Drawing upon his newly acquired cultural capital, he was able to theorize his previous classroom practices whilst also experimenting with new theories in his teaching designs, thereby grounding his teaching in solid theoretical foundations. As he commented, "What I've learnt during my doctorate enables me to make my teaching designs more theoretically sound" (Liang-NFs). By leveraging the theoretical and research knowledge to legitimize his teaching and communicate its merits in a scholarly manner, Liang won the most prestigious national teaching innovation award, which served as key symbolic capital affirming his teaching merits in higher education and enabled him to further establish himself as an excellent TESOL lecturer.

Drawing upon the theoretical knowledge and research capacity he developed during his doctoral learning, Liang considered himself transitioning "from a language instructor to a university academic" (Liang-NFs). Like many TESOL lecturers, Liang used to be stuck in a 'technician' role (Bao & Feng, 2022), as English is positioned as a skill-based public course in Chinese higher education (Zeng & Fickel, 2021). Compared with teachers from other academic disciplines who had more autonomy to integrate research-driven insights into their courses, Liang found himself constrained by a unified curriculum that emphasizes language skills. Teaching skill-based courses in higher education, where research-informed teaching is valued (Tight, 2016), Liang raised concerns about his legitimacy as a university academic. As he remarked, "While I never underestimate the importance of supporting students' language proficiency development through English courses, I feel that to become a true academic, I need to provide more cutting-edge knowledge and inspire students' thinking" (Liang-Interview).

Liang's ideal of teaching research-informed courses and consolidating his academic identity was supported by his ongoing doctoral research. Choosing language teacher development as the topic of his capstone thesis, Liang had read extensively in this field and accumulated a wealth of knowledge and perspectives. Using this cultural capital, he designed an English-medium, content-based course called *Theory and Practice in Teachers' Professional Development*, which later became a core course for students majoring in education. In this course, he not only taught the students cutting-edge knowledge in the field but also involved them in research-oriented mini-projects. This boosted his self-perception as a university academic.

> Initiating this course is an exciting attempt. I use the existing literature and my own doctoral research to form the course content. I also guide the students in conducting research-oriented mini-projects, for example, asking them to interview their former schoolteachers and write a report using the theoretical constructs they've learnt in my course. Hopefully we can co-author some papers based on course projects. With these new practices, I feel no different from disciplinary academics. (Liang-Interview)

6 Discussion

Drawing upon the investment model (Darvin & Norton, 2015), the study examined how two Chinese TESOL lecturers negotiated their identities and capital when investing in doctoral learning and how their investment enabled them to claim legitimacy in their professional context of higher education. Through a nuanced analysis of their professional stories and doctoral learning trajectories enabled by the theoretical apparatus of the investment model, the study generated new insights into the complexities of TESOL lecturers' pursuit of further doctoral learning and the impact of doctoral education on the professional development and identity formation of TESOL lecturers in China and beyond.

First, the study unravelled the complex internal-external dynamics shaping in-service lecturers' choice to pursue further doctoral learning. As research-inactive, non-doctoral teachers in the higher education community, Sunny and Liang lacked the capital valued by prevailing metrics-driven institutional ideologies and chose to invest in further doctoral studies as a way to achieve professional development and claim legitimacy. While this driving force is reminiscent of the findings from previous studies on TESOL lecturers' participation in in-service education programs (e.g., Bao & Feng, 2022; Bao, Hu, & Feng, 2024), the present study found that, beyond the pursuit of desired capital and identities, teachers' investment in further education was also influenced by their consideration of whether they possessed or could negotiate the necessary capital to navigate their further education. For example, although the idea of pursuing a doctorate had long lingered in Sunny's mind, she waited until she had accumulated enough economic capital and established her teacher identity before starting her doctorate. Relatedly, Liang waited until he had made substantial contributions in his professional work and gained the capital to negotiate with his institution for a study leave before he applied for the doctorate. Such findings highlighted learning as closely intertwined with the realities in the social and material world (cf. Norton Peirce, 1995), demonstrating that teachers are more motivated to pursue further learning and professional development when they can perceive available affordances. The gap between teachers' desired identities and their perceived lack of affordances can serve as an implicit yet powerful barrier to their initiatives in continuing professional learning, which may be a contributing factor to the persistent scarcity of doctoral degree holders among Chinese TESOL lecturers (Zhang et al., 2024), despite the pull of the current metrics-driven institutional ideologies.

Second, the study expanded on the observation that the multiple roles undertaken by doctoral students who are concurrently experienced professionals can significantly complicate their doctoral learning trajectories (e.g., Billot et al., 2021; Dann et al., 2019). Echoing previous studies (e.g., Bao, Feng, & Hu, 2024; Smith et al., 2020), professional workload, time deprivation, and alienation from the mainstream doctoral community were found to be major stressors for the participants, who had to juggle work and doctoral learning. However, despite these challenges, both participants demonstrated agency and flexibility in manoeuvring their capital and adjusting their projected identities when they traversed between their professional work and doctoral studies. For example, after weighing the competing interests between exploring a new research area and completing her doctorate on time amid multiple commitments, Sunny adjusted her original aspiration of achieving the ideal teaching-research nexus, and redirected her focus towards the smooth attainment of the doctoral title, a symbolic capital valued by her institution. She also leveraged the cultural and social capital she had amassed through her previous study and work experiences—such as her prior knowledge of the research field, advice from her social networks, and her insider understanding of teacher-student relationships—to inform and advance her doctoral progress, adding new evidence that the tacit knowledge about academia gained from by insider roles could be harnessed as a valuable resource for navigating the doctoral progress (Boncori & Smith, 2020). In Liang's case, he let go of his initial projection of belonging to a doctoral research community and learning under the hands-on guidance from his supervisor, after recognizing the constraints of the part-time, long-distance study mode of his doctoral learning. Instead, he drew upon the social capital he amassed in his professional context to facilitate his research progress and renegotiated himself as an

independent doctoral student. While following different learning trajectories, both cases showed that when the desired capital and identities become unattainable due to the systemic tensions of jugging work and studies, teachers can exercise their agency to negotiate their expectations and use their existing capital or develop new capital to find alternative pathways towards professional growth, even though the conversion and negotiation of identities and capital may be a site of struggle (Darvin & Norton, 2015).

Third, building on previous argument that in-service doctoral learning can create spaces for university TESOL lecturers to reframe their professional identities and claim legitimacy in the higher education community (e.g., Bao, Hu, & Feng, 2024), the study further highlighted that gaining legitimacy through doctoral learning was a non-linear process and took varied forms. For Sunny, her investment in further doctoral learning did not lead to the immediate acquisition of the capital valued by the current institutional ideologies in higher education, namely, solid research outputs. However, it won her a certification of her current position and thus a safe space for continued efforts, due to the symbolic capital embedded in the doctoral title itself. More importantly, her investment enabled her to attain a range of capital necessary for her future research endeavours, including research skills and knowledge as well as research collaboration networks, which enabled her to envision a researcher identity. This aligns with Darvin and Norton's (2015) claim that investment in learning opened up possibilities for expanding one's imagined identities. In Liang's case, instead of prioritizing the development of a researcher identity valued by prevailing institutional ideologies, he leveraged doctoral learning to further strengthen his TESOL lecturer identity. Drawing upon his newly acquired capital of theoretical and research knowledge, he infused rigor and logic into his teaching designs and initiated new advanced courses, aligning with the well-regarded ethos of research-informed teaching in higher education (Tight, 2016). For TESOL lecturers, strengthened teacher identities can help them maintain a sense of professional worth and legitimacy even in the climate of research prioritization and further motivate their efforts in continuing professional development (Bao & Feng, 2023). Relating to the international literature on the power differentials between TESOL lecturers and TESOL researchers (e.g., McKinley, 2019; Sato & Loewen, 2019), Liang's case also showed that investing in doctoral learning can empower TESOL lecturers to justify their own pedagogical practices and gain autonomy over course design and development (Bao, Hu, & Feng, 2024), thus reframing the power relations and claiming the right to speak in their professional community (Darvin & Norton, 2015). Based on the findings from the two cases, pursuing a doctorate may not directly lead to legitimate full membership in the higher education community, but it plays a crucial role in mediating teachers' diverse pathways towards legitimacy. By creating spaces for teachers to acquire and negotiate essential capital in navigating the academic career, doctoral learning provides a ticket for teachers to strive for career advancement in the professional arena of higher education and (re)negotiate their professional identities in relation to the changing institutional ideologies.

7 Conclusion

Through a narrative case study of two TESOL lecturers' investment in further doctoral learning, this study illustrates the complexities of in-service teachers' pursuit of a doctorate for professional development. The findings show that in-service teachers constantly negotiate their identities and capital to navigate the challenges in their doctoral learning. Their investment in doctoral learning enables them to gain an array of capital, allowing them to construct legitimacy within their professional context in varied ways. Theoretically, the study extends the investment model by explicating how the model, with its strong explanatory power and theoretical robustness, can be applied beyond language learning. In particular, the model's sensitivity to both circumscribing contexts and individual agency makes it a valuable theoretical tool for understanding the complexities of individuals' diverse forms of learning and practices in the educational and social contexts.

Empirically, the study offers implications for how TESOL lecturers in higher education can be better supported in their pursuit of continuing learning for professional development. By situating investment in learning within the broader sociocultural picture, the study shifts our gaze beyond teachers to examine "the systemic patterns of control" (Darvin & Norton, 2015, p. 42) influencing teachers' continuing professional learning. When higher education institutions in China and worldwide are pushing their non-doctoral teachers to gain credibility and legitimacy through further doctoral learning (Bao, Feng, & Hu, 2024; Boncori & Smith, 2020; Dann et al., 2019), they need to consider the pragmatic constraints teachers face and the affordances they could create to support teachers' investment in doctoral education. For example, institutions could develop support systems by offering funding opportunities, extended study leaves, and flexible teaching schedules. If teachers perceive they have the necessary capital and resources at their disposal, they are more likely to exercise their agency in pursuing further doctoral learning. Relatedly, when doctoral programs, particularly professional doctoral programs tailored for in-service professionals (Bourner et al., 2001), begin to enrol in-service teachers as students, program designers need to develop an understanding of in-service teachers' prior and desired identities and capital and use this knowledge to inform program designs. Only by acknowledging teachers' unique identities and capital can program providers create more suitable curricula and mentorship mechanisms. For example, responding to teachers' inclination to integrate doctoral research with teaching, programs could offer one-on-one consultations or introductory sessions focused on teachers' research areas at the earlier stages of their doctoral studies (Bao, Hu, & Feng, 2024). With earlier and customized inductions, teachers can make informed decisions about their doctoral research topics, thereby avoiding the struggles of navigating the process through trial and error. To address in-service teachers' alienation from the doctoral research community, programs could leverage digital platforms to create virtual communities where supervisors and doctoral peers meet and communicate regularly. These online spaces would enable part-time, long-distance doctoral teachers to foster a sense of belonging within the research community, seek and proffer mutual support, and build research collaboration networks.

Despite the insights generated, the study is not without limitations. While a narrative case study approach focuses on teachers' narration and interpretation of their investment in doctoral learning, future research could include observational data to examine how teachers actually engage in their professional work and doctoral studies. Furthermore, although the in-depth understandings gained from two information-rich cases contribute to theorizing the underexplored phenomenon (Duff, 2012), larger-scale studies are needed to represent the broader population of TESOL lecturers who invest in further doctoral learning for professional development and career advancement.

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Jie BAO is an associate professor in the School of Humanities, Tianjin University of Finance and Economics. Her research interests include language teacher identity and academic literacy development. Her recent publications appeared in journals such as System, Teaching and Teacher Education, Studies in Higher Education, Gender and Education, European Journal of Teacher Education, Computer Assisted Language Learning, and Teaching in Higher Education. ORCiD: 0000-0001-5860-6732