# Chapter 2
# Literature Review


This chapter examines a selection of previous research on multilingual/trilingual education, and includes a review of code-switching and code-mixing and the historical development of the language policies in Hong Kong from the past to present.

## 2.1 Multilingual/Trilingual Education

### *2.1.1 Definitions*

Multilingualism and trilingualism is common in Europe and in many other parts of the world (Aronin 2005; Cenoz and Gorter 2005), resulting from historical, social and political factors (Cenoz and Jessner 2000). According to Fasold (1984, p. 9), four different kinds of historical patterns lead to societal multilingualism and they are: migration, imperialism, federation and border area multilingualism. Cenoz (2013, p. 4) points out that globalisation, transnational mobility of the population, and the spread of new technologies are factors that contribute to multilingualism. Cenoz and Genesee (1998) mention that the growing need for individual multilingualism "results from increasing communications among different parts of the world and the need to be competent in languages of wider communication" (p. vii). Aronin and Singleton (2008, pp. 1–2) suggest that recent multilingualism should be considered as a new linguistic phenomenon for the following reasons:

1. Multilingualism is ubiquitous, on the rise worldwide, and increasingly deep and broad in its effects.
2. Multilingualism is developing within the context of the new reality of globalisation.



L. Wang, A. Kirkpatrick, *Trilingual Education in Hong Kong Primary Schools*,
Multilingual Education 33, https://doi.org/10.1007/978-3-030-11081-9_2

3. Multilingualism is now such an inherent element of human society that it is necessary to the functioning of major components of the social structure (in the broad sense, encompassing, inter alia, technology, finance, politics and culture).

Multilingualism is a complex phenomenon that can be interpreted in different ways (Cenoz 2013). The Cambridge Dictionary defines a multilingual individual as a person who is able to use more than two languages for communication (http://dictionary.cambridge.org/dictionary/english/multilingual), while Li Wei (2008b, p. 4) identifies a multilingual individual as "anyone who can communicate in more than one language, be it active (through speaking and writing) or passive (through listening and reading)". Mitchell (2012, p. 1) calls 'a student whose daily life reality necessitates the negotiation of two or more languages "a multilingual learner"'. Multilingualism is defined by the European Commission as "the ability of societies, institutions, groups and individuals to engage, on a regular basis, with more than one language in their day-to-day lives" (European Commission 2007, p. 6). As Cenoz (2013, p. 5) points out, multilingualism is simultaneously "an individual and a social phenomenon". Individual multilingualism refers to a speaker's knowledge and his ability to use more than two languages while societal multilingualism is the linguistic diversity that can be found in a country, in which more than one language in a speech community is officially recognised (Cenoz 2013; Clyne 1997). In general, an individual can assimilate the different languages at the same time by being exposed to two or more languages from birth, or consecutively, by being exposed to second or additional languages later in life (Cenoz 2013). There is an important difference between additive and subtractive multilingualism. A language is added to the linguistic repertoire of the speaker while the first language continues to be developed when speakers of a majority language acquire other languages for additive multilingualism. Subtractive multilingualism refers to situations in which a new language is learned and replaces the first language as, for example, when immigrant schoolchildren are required to shift to the language of the host country without being given the opportunity to develop or maintain their own language (Cenoz 2013, pp. 5–6).

Our study focuses on the trilingual education in Hong Kong context. Trilingual education is defined by Riemersma (2011, p. 7) as "three target languages are to be taught as a school subject as well as used as a medium of instruction during a relevant number of teaching hours". To Beetsma (2002), there is no clear definition of trilingual education, which "has often been assumed to be an extension of bilingualism" (Hoffmann 2001, p. 1). Hoffmann (2001) further notes that multilingualism incorporates "the idea that not only is more than one language involved, but also that any number of linguistic varieties may be present in the particular sociolinguistic situation under consideration" (p. 2). To Cenoz et al. (2001, p. 3), the distinction between third language acquisition and trilingual education is that "third language acquisition in the school context would refer to learning an L3 as a subject and trilingual education could refer to the use of three languages as languages of instruction". Aronin (2005, p. 8) points out that "in most academic discussions trilingualism and multilingualism are interchangeable notions".

As education in many countries occurs in multilingual contexts, educational policy makers are currently facing difficulties in deciding the choice of language of instruction while balancing and respecting the use of different languages. Generally speaking, multilingual education is considered good (Hornberger 2009; UNESCO 2003). Multilingual education not only can prepare coming generations to take part in creating more democratic and just societies in a globalised and intercultural world, but also meet the specific needs of culturally and linguistically distinct communities (Hornberger 2009; UNESCO 2003). Multilingual education programmes offer "a way of allowing children to experience their rich multilingual backgrounds as an advantage and as a means of thriving in a multilingual world" (Analytical 2015, p. 2). According to Hornberger (2009), multilingual education is:

1. multilingual in that it uses and values more than one language in teaching and learning;
2. intercultural in that it recognises and values understanding and dialogue across different lived experiences and cultural worldviews; and
3. education that draws out, taking as its starting point the knowledge students bring to the classroom and moving toward their participation as full and indispensable actors in society–locally, nationally, and globally (p. 198).

Hélot and Young (2006, p. 69) define a multilingual school as:

> a place where linguistic and cultural diversity is acknowledged and valued, where children can feel safe to use their home language alongside the school language (French in this case) to learn and to communicate, where teachers are not afraid and do not feel threatened to hear languages they do not know, and where multilingualism and multilingual literacies are supported.

A significant issue in multilingual education is the medium of instruction (MoI): Which language(s) should be adopted as the medium of education and which language should be adopted to teach which subject – including the language itself? As Cenoz and Genesee (1998) point out, multilingual education means "educational programmes that use languages other than the first languages as media of instruction (although some teach additional languages as school subjects) which aim for communicative proficiency in more than two languages" (p. viii). Hélot (2013) argues that true multilingual education must fully incorporate the second or foreign languages in the regular syllabus and that they are used as languages of instruction. Recent researchers have distinguished between bilingual education and multilingual education, for example, Lasagabaster (2015, p. 17) suggests that the label multilingual education will only be used "if the educational model concerned uses three languages as media of instruction and/or the objective is to reach at least trilingualism". Lasagabaster (2015, p. 17) also points out that the Basque experimental programme called Framework for Trilingual Education is multilingual education, as Basque, Spanish and English are used as means of instruction in each of the 118 schools involved.

### 2.1.2 Multilingual Education in Southeast Asia

Currently, many children worldwide are learning a third language in the school context (Cenoz et al. 2001; Hoffmann 2001) and it is a "growing phenomenon all over Europe" (Beetsma 2002, p. 6). This forms part of a trend "to introduce a foreign language from an earlier age and a second foreign language at the end of primary school or in secondary school and the increasing use of minority languages in education in many parts of the world" (Cenoz et al. 2001, p. 2).

Southeast Asia is composed of 11 independent nations: Brunei Darussalam, Cambodia, Indonesia, Lao PDR (Laos), Malaysia, Myanmar, the Philippines, Singapore, Thailand, Timor-Leste, and Vietnam. With the exception of Timor Leste, these nations form the Association of South East Asian Nations (ASEAN). Traditionally, the main languages of instruction (LOI) and languages of literacy in Southeast Asia are the relevant official and national languages. Some movement towards multilingual education (MLE) has arisen in the region with the support for the non-dominant languages (NDLs). Non-dominant languages (NDLs) refer to "languages or language varieties that are not considered the most prominent in terms of number, prestige, or official use by the government and/or the education system" (Kosonen and Young 2009, p. 12). One country that has moved to promote indigenous languages as languages of education is the Philippines. The government has recently introduced a system of mother-tongue based multilingual education (MTBMLE) whereby 19 indigenous languages have been gazetted as languages of instruction for the first 3 years of primary school. MTBMLE replaces a bilingual language education policy in force since 1974, which saw English and Tagalog/Filipino as the two media of instruction, English for maths and science subjects and Filipino for arts subjects (Kirkpatrick and Liddicoat 2017). This was despite the fact that some 180 languages are spoken in the Philippines and some of them are spoken by millions of people such as Bicol, Cebuano, Illongo, Ilocano and Tagalog (Lewis et al. 2016). As a result, under the bilingual education policy, most Filipinos could not study through languages they spoke at home (Kaplan and Baldauf 2003; Kirkpatrick 2012; Kosonen 2017b; Tupas and Lorente 2014). The implementation of MLE in the Philippines represents a radical shift in policy (Kirkpatrick 2010), which is part of "a growing trend around the world to support mother tongue instruction in the early years of a child's education" (Burton 2013, p. 2). The Philippines is, nevertheless, the only country to establish a national policy requiring the inclusion of mother tongue in the early grades (Cruz 2015).

On the whole, mother-tongue-based multilingual education programmes aim to create confidence in learners and help them build bridges not just between languages of instruction, but also between the culture of home, family, and community and the broader society in which their language community exists. Such programmes also target incorporating content that is familiar to the learners into the curriculum and deliver that content in a language that is familiar to the learners in the ethnolinguistic communities where the learners are speakers of non-dominant languages (Young 2009).

Generally speaking, however, NDLs are seen by most decision-makers as a problem rather than a resource (Kosonen and Young 2009). Kosonen (2017a, p. 4) states that "countries with more pluralistic language policies, such as Cambodia, the Philippines, Thailand Timor-Leste and Vietnam use some NDLs as languages of instruction in multilingual education". However, the use of NDLs as languages of instruction in Cambodia, Thailand and Vietnam remains at the initial stage comprising pilot projects, often financed by NGOs (Kosonen 2009). Meanwhile, Brunei, Indonesia, Lao PDR, and Malaysia, put emphasis on the national/official languages in their education systems (Kosonen 2017a). In Singapore, English is the medium of instruction throughout the education system. Students also learn their mother tongues, defined uniquely in the Singaporean context as being inextricably linked to ethnicity, so that an ethnically Chinese child will by definition learn Mandarin as their mother-tongue, no matter whether this is really the child's mother tongue or not. We discuss the linguistic context and language education policies of a selection of countries in more detail below.

An estimated 72 languages are spoken in the Kingdom of Thailand (Lewis et al. 2016). Standard Thai, which is based on Central Thai as spoken in the capital, Bangkok, is the de facto official and national language of Thailand, and the Thai Constitution makes no mention of an official language (Kosonen 2017a). An estimated 50% of Thai citizens speak Standard or Central Thai as their first language (Kosonen 2009). Standard Thai, possessing indisputable status and prestige, is widely spoken as a second language throughout the country and is the medium of instruction at all levels of education for a century. However, many children have comprehension problems in the early years of education (Benson and Kosonen 2012; Kosonen 2013; Kosonen and Person 2014; Watson 2011) because many learners do not have proficiency in Standard Thai. Therefore, ethnolinguistic minority children have lower learning outcomes in all main subjects than students whose home language is Thai (Kosonen and Young 2009). The Thai school curriculum first allowed the teaching of non-dominant languages in 2002 in areas where ethnolinguistic communities live (Siltragool et al. 2009). Later, two different Thai governments approved Thailand's first National Language Policy (NLP) in 2010 and 2012 respectively (Kosonen 2017a). The NLP deals with non-dominant languages and their use in education recognising the use of learners' first languages as the basis for cognitive development (Kosonen 2017a). Several non-dominant languages are presently used in L1-based education pilot projects run by academic institutions and non-governmental actors in partnership with the Ministry of Education (Kosonen 2013; Kosonen and Person 2014). In 2015, two teacher training institutions started to train MLE teachers, and in 2017 there has been serious discussion about an operational plan as well as a budget to implement the NLP (Kosonen 2017a). However, Siltragool et al. (2009) reported in their case study in two villages, Pa Kha and Nong Ung Tai, that some parents wanted their children to study Thai from the first day of school so that they could communicate with Thai speakers and be able to participate and get on in Thai society.

Around 134 languages are spoken in Malaysia (Lewis et al. 2016) and the Malays, the dominant ethnolinguistic group, represent about half of the population. The other

two major ethnic groups are the Chinese (23.3%) and the Indians (6.9%) and the rest of the population comprises indigenous non-Malays. Standard Malay (Bahasa Malaysia or Bahasa Melayu) is set as the official and national language by the Constitution of 1957, while English, Chinese and Tamil are widely spoken as well. These two languages are offered in schools. The Constitution also assures people's freedom to use, teach, and learn any language, as well as the preservation and maintenance of non-dominant languages (David and Govindasamy 2007; Ethnologue, 2005; Leclerc 2009; Nagarathinam 2008). Children of ethnolinguistic groups are encouraged to learn their mother tongue in order to preserve their language and culture (Logijin 2009). Malay is the main language of instruction in national schools, although English was used for a period as the medium of instruction for the teaching of maths and science in primary schools. However, Malaysia has recently decided to abandon this project (Gill 2012), as many children were failing in these subjects. As a result Malay has been re-introduced as the MoI for these subjects in primary schools and English is now taught as a subject. Complaints about the return to Malay-medium instruction have been made by urban middle class, many of whom have a good foundation in English (Kirkpatrick 2012; Watson 2011).

Singapore has a multi-ethnic population and a diverse language environment, with 24 languages (Lewis et al. 2016) in which Malay, Chinese (Mandarin), Tamil, and English are the official languages and the national language is Malay (Pang 2009). Ethnic Chinese (75.6%), who comprise the majority, have traditionally spoken different varieties of Chinese such as Hokkien, Teochew, Cantonese, Hakka, Hainanese, and Foochow. The remaining population is composed of Malays, Tamils and other ethnolinguistic groups. As noted above, all students in Singapore are required to study both English and one of the official 'mother tongue languages' i.e. Malay, Mandarin, or Tamil, from the early years of primary education through to the secondary level (Primary 1 to Secondary 4/5, ages 7 to 16) under the bilingual policy (Kosonen 2017a; Pang 2009). English is the main medium of instruction in schools, except for the teaching of civics, moral education, and the mother tongue languages (Pang 2009).

At the 2008 South East Asian Ministers of Education (SEAMEO) Centre Directors' Meeting, which was held in Bangkok, the SEAMEO-World Bank project on the Use of the Mother Tongue as Bridge Language of Instruction in Southeast Asian Countries was a key item for discussion (Haddad 2007). In summary, many governments and educational institutions are grappling with issues connected with language education and the respective role of local languages, the national language and English within national curricula. Despite this and the efforts being made by some of the ASEAN governments, the place of indigenous languages in education is precarious. In their overview of language education policy and practice across Asia, Kirkpatrick and Liddicoat (2017) concluded that the trends are for the promotion of the respective national language as the main language of education with English being introduced as the 'second' language. Indigenous languages are, in the main, neglected as languages of education and the future of many of these appears endangered.

Interest and developments in multilingual education extends beyond Asia. The creation of citizens who are 'plurilingual' is, for example, a key component of the language education policy in the European Union (Beacco and Byram 2003).

### *2.1.3 Multilingual Education in Europe*

Many member states of the European Union (EU) are bilingual or multilingual in which several languages are used as languages of instruction (Cenoz at el. 2001). Many new multilingual initiatives at primary level in the EU are related to "the trends of growing recognition of regional and minority languages and increasing internationalisation" (Beetsma 2002, p. 6). The language policy in EU is to maintain distinct national, cultural and L1 linguistic identity (Beetsma 2002; Riemersma 2011). All the mother tongues (L1) of 28 countries, including Maltese and Gaelic are taught and the respective L1 is the basic language of instruction in primary school. English is normally the first foreign language (European Commission 2007) and German and French are likely to be the most popular second foreign languages in European countries, while third and fourth language acquisition is also common (Cenoz et al. 2001). All students need to build their language competency in an L2 and L3 and an optional L4. Typically, the learning of the L2 starts at the first year in primary school, the learning of the L3 starts at the first year of secondary school and the L4 at the fourth year of secondary school.

Darquennes (2013, p. 1) points out that multilingual education in Europe can be divided into four population categories: (a) multilingual education aiming primarily at the majority population, (b) multilingual education aiming primarily at an indigenous minority, (c) multilingual education aiming primarily at the immigrant population, and (d) multilingual education aiming primarily at an affluent international audience including those schools mainly attended by children of diplomats, officials working for an international organisation (e.g., the EU, UNESCO, NATO), or expatriates working for multinational companies.

Multilingual education aiming primarily at the majority population takes the form of a type of content-based instruction, also known as Content and Language Integrated Learning (CLIL), (Gorter and Cenoz 2011). The most common CLIL language in the EU is English, followed by French and German. Other languages such as Spanish, Italian, and Russian currently only play a marginal role as CLIL languages (Darquennes 2013). With the increasing popularity of multilingual education at secondary level, multilingual education at the primary school is also increasing.

The European Charter for Regional or Minority Languages of the Council of Europe (2010) describes 'minority languages' as "languages that are traditionally used within a given territory of a state by nationals of that state who form a group numerically smaller than the rest of the state's population and [are] different from the official language(s) of that state". The number of indigenous minority languages is estimated at approximately 60 in the 27 member states of the EU and at

approximately 150 in the whole of Europe (Darquennes 2013). Multilingual education primarily aiming at an indigenous language minority is mostly offered at the level of kindergarten and primary school and less at the level of secondary education. For example, a total number of 284 primary schools and only 4 secondary schools offered multilingual education in German and Hungarian for the German minority population in Hungary in 1999/2000 (European Commission 2004, pp. 119–120). Other languages are taught as a subject such as the case in Lithuanian-Russian schools in Lithuania (European Commission 2004, p. 205). Recently, more and more Spanish-speaking immigrants have been attracted by the industrialisation of the Basque Autonomous Community (BAC) (Cenoz and Etxague, 2011). Basque and Spanish were made the official languages and compulsory subjects in all schools in the BAC in 1979 and 1982 respectively. Three models of language schooling were established: models A, B and D (there is no letter 'C' in Basque). These models differ in terms of the language or languages of instruction, their linguistic aims, and their intended student population (ibid.). Model A schools are intended for native speakers of Spanish who choose to be instructed in Spanish. Basque is taught as a second language for 3–5 h a week. These schools provide minimal instruction and, thus, minimal proficiency in Basque as a second language. Model B schools are intended for native speakers of Spanish who want to be bilingual in Basque and Spanish. Both Basque and Spanish are used as languages of instruction for approximately 50% of school time, varying from school to school. Basque is the language of instruction and Spanish is taught as a subject for 3–5 h a week in Model D schools. This model was originally created as a language maintenance programme for native speakers of Basque, but presently also includes a large number of students with Spanish as their first language. Consequently, Model D schools can be regarded as both total immersion programmes for native Spanish-speaking students and first language maintenance programmes for native Basque speakers (Cenoz 2009; Cenoz and Etxague 2011; Darquennes 2013; Gorter 2015).

Since the second half of the twentieth century, there have always been speakers of immigrant minority languages in Europe (Extra 2009) which have regained increased recognition and support (Gorter and Cenoz 2011). European countries have to adapt or re-adapt their education policies especially their language-in-education policies to the increasingly multilingual and multicultural character of the school population (Darquennes 2013). Therefore, a balance between an emphasis on learning (in) the language that is the majority language of the country or region in which the immigrants reside and the integration of immigrant minority languages in the curriculum needs to be sought. The integration of immigrant minority languages in the curriculum is meant to help the immigrant students overcome language-related learning difficulties rather than to prepare the immigrant children for a return to their (parents') home countries (Darquennes 2013). In Brussels, ten primary Dutch-language schools are part of the Foyer project and they offer multilingual education programmes for immigrants residing in Brussels. Three schools offer programmes oriented to Turkish immigrant children, three to Italian

immigrant children, two to Moroccan immigrant children, one to Spanish immigrant children, and one to Aramean-Turkish immigrant children. The aim of the programmes is to "gradually integrate the immigrant children in the host-school environment while simultaneously preserving and reinforcing the children's mother tongue and cultural identity in kindergarten and during the two years of primary school" (Darquennes 2013, p. 5). It is hoped that, through these programmes, pupils' confidence in their own cultural identity as the backbone for their development as world citizens will be enhanced. Multilingual education primarily aiming at an affluent international audience is currently operated in 14 European Schools (ES) spread over 7 countries (Belgium, Germany, Italy, Luxembourg, the Netherlands, Spain, and the United Kingdom) (Darquennes 2013). The ES provide high-quality multicultural and multilingual education to the children of the staff of the EU institutions (Vez 2009; Darquennes 2013). However, most ES pupils are language minority children in the sense that their home language is not the majority language of the host community where the school is located. In ES, most pupils have their first language as a language of instruction at the level of primary education. A first foreign language (English, German, or French) is introduced in the first year of primary education and used as a language of instruction toward the end of primary and increasingly so in secondary education. In some cases, a third or fourth language of instruction comes into play in secondary education, depending on the optional subjects that are chosen (Darquennes 2013). A significant mission of the ES is to "develop a pluralistic identity and to prepare pupils for life in linguistically and culturally heterogeneous societies. This implies additive multilingualism, with high levels of functional proficiency and literacy in at least two languages: the child's home language and one of the school working languages" (Vez 2009, p. 9).

Multilingual education in Europe is facing several challenges, of which policy makers and language-education professionals are aware (Cenoz and Gorter 2005; Darquennes 2013). These challenges include:

(1) It is difficult to find teachers who are qualified to teach specific subject matter in the target language of multilingual education as all teachers need to be native-speakers of their teaching language.
(2) Teacher training offering a combination of language and content in most of the European languages is still in its infancy.
(3) There is a lack of adequate teaching materials and uncertainty on how to assess the language side of non-linguistic content.
(4) How to maintain and develop minority languages?
(5) How students can achieve multilingual competence? (Cenoz and Gorter 2005, p. 3; Darquennes 2013, p. 6).

Problems concerning language learning can be described as the 'forward shift' from proficiency to actual use because learners of the minority language as a second language use it much less than those who acquire it as a first language (Gorter 2015, p. 95). However, the supranational institutions such as European Commission and

the Council of Europe have put considerable effort in promoting the exchange of good practices in multilingual education through the funding of projects, while giving shape to language-in-education policy objectives (Darquennes 2013, p. 6). The Council of Europe has also developed a *Guide for the Development of Language Policies in Europe* that was updated in 2007 to enable member states and regions to analyse both the strengths and the weaknesses of their language-in-education policy (Darquennes 2013, p. 6). All in all, the language polices in Europe, on one hand, aim to maintain the child's distinct home culture and national identity and, on the other hand, to develop a supra-national European identity (Vez 2009, pp. 9–10).

Generally speaking, however, researchers have paid relatively little attention to trilingual education and third language acquisition as compared to the massive literature on bilingual education and second language acquisition in the school context (Cenoz et al. 2001; Hoffmann 2001). Martinez (1989) examined the consistency between the perception of teachers and parents toward the value of bilingual education for facilitating the academic growth of school-age children, suggesting a great deal of similarity in the perceptions of parents and teachers toward various issues surrounding bilingual education practices. Iyamu and Ogiegbaen (2007) surveyed 1000 primary school teachers and 1500 parents of primary school children in Nigeria. Their findings showed that both parents and teachers valued the benefits brought by mother-tongue education, but that parents would not approve of their children being taught in the mother tongue for two main reasons: the push for a language of wider communication; and a lack of suitable teaching materials. As a result, a reorientation of parents and the public on the place of mother-tongue education was recommended (p. 97). Lefebvre (2012) studied the student attitudes towards multilingual education, pointing out that students' fear of failure and peer-to-peer shaming when learning a new language can leave them feeling hesitant. She concluded that creating a safe learning environment is very important to avoid students' fear of failure Meanwhile, Chukurova and Abdildina (2014) conducted research on students' perceptions of trilingual education at Nazarbayev Intellectual Schools, an experimental platform, created in 2008 by Kazakhstan government, for introducing the newest innovations in education with an aim to transfer the best experience and practice to the national educational system. They found that students had positive perceptions of trilingual education.

To date, there has been scant research on trilingual education in Hong Kong, especially from the perspectives of parents and students. This book aims to contrast and compare current provisions of trilingual education in Hong Kong's primary schools. A recurring issue in the debate about trilingual education is whether code-switching or code-mixing should be allowed in the classroom. We therefore review recent research into this topic below.

## 2.2 Code-Switching and Code-Mixing

### *2.2.1 Definitions and Functions*

Code-switching, a linguistic phenomenon which occurs in multilingual speech communities, refers to the process in which a communicatively competent multilingual speaker switches or alternates usually between two languages or language varieties or codes during the same conversation. Many scholars have provided definitions of the phenomenon. For example, code-switching is the "alternation of two languages within a single discourse, sentence or constituent" (Poplack 1980, p. 583). John Lyons (1977) considers code-switching as the ability of members of a language community to pass from one dialect or variety of the language to another according to the situation. Chan (2003) defines code-switching as "the juxtaposition of lexical elements from two or more languages in a discourse" (p. 3). To Lin (2008, p. 273), classroom code-switching refers "to the alternating use of more than one linguistic code in the classroom by any of the classroom participants (e.g., teacher, students, teacher's aide)". Code-mixing is "the change of one language to another within the same utterance or in the same oral/written text" (Ho 2007), and this may occur when the speakers are unable to find suitable words or expressions with which to express their ideas (Ibhawaegbele and Edokpayi 2012). According to Li D. C. S. (2008a, p. 76), 'code-switching' (CS) refers to "the alternate use of two or more languages in an extended stretch of discourse, where the switch takes place at sentence or clause boundaries. When the switch takes place within a sentence or clause, the term 'code-mixing' (CM) is preferred". To sum up, code-switching shows the movement from one code to another in a single interaction, while code-mixing explicitly indicates a mixture between two codes. In certain contexts, the speakers' use of more than one language to achieve communicative ends looks like translanguaging (Garcia and Wei 2014), but we have chosen to stick to the terms 'code-switching' and 'code-mixing' as these are the accepted terms in Hong Kong circles.

Researchers generally agree that code-mixing/code-switching benefits student learning. Li D.C.S. (2008a, p. 75) believes "code-switching has great potential for helping the bilingual teacher to achieve context-specific teaching and learning goals like clarifying difficult concepts and reinforcing students' bilingual lexicon…". Hirvela and Law (1991, p. 37) state that "in certain forms and in the teaching of certain subjects, mixed code teaching might be the most effective means of instruction, hence making it 'good'". Ferguson (2003, p. 49) considers classroom code-switching as "one potential resource for mitigating the difficulties experienced by pupils studying content subjects through a foreign language medium". Ferguson (2003, p. 39, 2009, pp. 231–232) summarises three broad functional categories of CS as follows:

1. CS for constructing and transmitting knowledge, which help pupils understand the subject matters of their lessons (this would cover pedagogic scaffolding,

annotation of key L2 technical terms, and the mediation of L2 textbook meanings);
2. CS for classroom management, e.g., to motivate, discipline and praise pupils, and to signal a change of footing (this would cover CS to signal a shift of footing, to use a Goffmanian term, from say, lesson content to management of pupil behaviour); and
3. CS for interpersonal relations (this would cover CS to index and negotiate different teacher identities, e.g. teacher as didact, teacher as authority figure, teacher as community member), and the use of CS to humanise the affective climate of the classroom and to negotiate different identities.

Camilleri (1996) looked at language practices in secondary classrooms in Malta which showed how teachers and learners employ code-switching between Maltese and English. Camilleri (1996, p. 101) concluded that the teachers used code-switching as a communicative resource for discourse management purposes: in providing explanations, in introducing new topics, or in making asides. Distinguishing between talk about lesson content and talk related to the negotiation of the social relations of the classroom, building rapport with students or asserting the teacher's authority could also be achieved by using code-switching. Code-switching provided a crucial means of accomplishing lessons across the curriculum and managing the problem of working with texts that are mostly written in English. Gauci and Camilleri Grima (2013) studied the issue of teacher code-switching in the teaching of Italian in Malta. The research study took place in a secondary school in Malta during the year 2009, with learners aged between 12 and 15. When analysing teacher code-switching, they showed that the learners' first language (L1), Maltese, is used as a pedagogical tool to enhance language learning. Teachers regularly turn to Maltese to provide more learner-friendly explanations of grammatical and other language points and to elicit an oral response from the learners and get them more directly involved in the activities (Gauci and Camilleri Grima 2013). Furthermore, Maltese "plays a role in discourse and classroom management, and also functions as a symbol of identity" (ibid., p. 615). Based on lesson transcriptions, in-depth interviews with teachers and Italian language professionals and a student questionnaire, they found code-switching could help in the following situations: asking for clarification; acknowledging a question; providing further explanation; revising and establishing rapport (Gauci and Camilleri Grima 2013, p. 618). Apart from this, code-switching and the use of the L1 were perceived by teachers and teacher educators as a useful tool with younger and weaker learners. Macaro (2005, p. 68), having carried out research on code-switching entirely in formal classroom settings among adolescent learners, states that the L1 was used for students with lower proficiency on the basis of mere comprehension because they "find it more difficult to infer meaning". Code-switching is thus seen by professionals and also by the learners concerned, as a tool which "renders the lesson content more accessible to students who have difficulties grasping the foreign language" (Gauci and Camilleri Grima 2013, p. 629). Mezzadri (2003, p. 66; translated by Gauci and Camilleri Grima 2013, p. 629) points out that "an exclusive use of the L2 inside the classroom could

have negative effects: from a motivational point of view it could discourage the students who have difficulties in understanding and in expressing themselves".

From the above discussion, we can argue that code-switching or code-mixing is beneficial to student language learning. In Hong Kong, however, the use of code-mixing in the classroom has been controversial. Mixed-code teaching has been practised in Hong Kong schools for many years, even though it is officially frowned upon and even though the schools classified themselves as EMI schools. The code-mixing involves a "mixed-code", with text books in English and oral instruction in Cantonese or a Cantonese/English mix. Educational experts on bilingualism have criticised this mixed-code method of teaching as "leading to poor standards in both English and Chinese" (Boyle 1997, p. 83). Below, we review the research on code-mixing in Hong Kong in more detail.

### *2.2.2 Research on Code-Switching and Code-Mixing in Hong Kong Context*

As noted earlier, Hong Kong is a multilingual society. The great majority of the population (95%) are ethnic Chinese who speak Cantonese as an LI. English and Putonghua are the other languages of education. Prior to 1997, around 90% of primary schools in Hong Kong were Chinese-medium (i.e. Cantonese-medium) (Bacon-Shone and Bolton 2008, p. 28) and the use of Cantonese as the MoI at the primary level has generally been accepted (Evans 2011) as it is believed that students can learn the best in their mother-tongue (Education Commission 1990). However, most secondary schools claimed to be EMI (English as a Medium of Instruction) schools under the colonial government's laissez-faire medium of instruction (MoI) policy, which allowed school principals to choose the medium of instruction. In reality many of these so-called EMI schools used a mixed code of English and Chinese (Pan 2000; Poon et al. 2013). Chen (2005, p. 529) even claims that "the practice of Cantonese-English code-mixing has developed into a societal norm, despite the fact that mixed code is overtly and negatively criticised in society". Although teachers regarded code-switching as a valuable communicative and pedagogic resource (e.g., Hirvela and Law 1991), the Education Department of Hong Kong viewed code-mixing as "the culprit for the perceived decline in English and Chinese standards of Hong Kong students in the past decade" (Li, D.C.S. 1998, p. 161). Moreover, Hong Kong's policy-making body, the Education Commission, identified mixed-mode instruction as the principal cause of students' apparently unsatisfactory levels of English and Chinese (Education Commission 1990, p. 23).

Worried about the increasing use of mixed code in secondary schools, the Government adopted some measures to deal with this issue. The Education Commission (EC) Report No. 4 in November 1990 stipulated that "the use of mixed-code in schools should be reduced in favour of the clear and consistent use in each class of Chinese or English in respect of teaching, textbooks and examinations"

(Education Commission 1990, p. 99, 6.4.1 (iii)). Moreover, the EC, believing students can learn better in their mother-tongue stated that it was important to 'encourage Chinese-medium instruction, to minimise mixed-code teaching and to give schools the choice as to which medium of instruction they use' (Education Commission 1990, p. 103).

The first major study on Cantonese-English code-switching in tertiary institutions was initiated by John Gibbons (1979, 1983). He studied '*U-gay-wa*' ('university talk'), which was a genre of mixed code commonly used and heard among students at the University of Hong Kong (D.C.S. Li 2000). Gibbons (1987) referred to this '*U-gay-wa*' as 'MIX', recognising that code-switching was not limited to university students, but was a Hong Kong-wide language phenomenon, especially among educated Hong Kong Chinese. More code-mixing related studies were conducted in the City University of Hong Kong by Pennington et al. (1992), Walters and Balla (1998), and Li and Tse (2002). Judy Ho (2008) investigated tertiary students' use of mixed code between Cantonese, English and Putonghua at Lingnan University.

Apart from the above studies on mixed code in tertiary institutions, there are also studies of code-switching in secondary school classrooms. Johnson (1983, 1985) studied and analysed actual instances of classroom code-switching, which focused on teaching and learning in different areas of the curriculum. Belinda Ho and Van Naerssen (1986) conducted a diary study in secondary school Form1 remedial English classrooms to explore the effectiveness of code-switching as a teaching strategy. Lin (1990) investigated what really happened in English language classrooms, and how and why teachers alternated between English (the TL) and Cantonese (the L1), so as to get a clearer picture of the English language classroom in four Anglo-Chinese secondary schools. Sung (2010) reported his first-hand experiences of being a 'purist' in Hong Kong, during which time he was not allowed to use mixed code, a common discursive practice among Hongkongers in Hong Kong while discussing the difficulties in using 'pure' English and 'pure' Chinese in his daily life, as well as exploring the problems he encountered when he used 'pure' English in teaching English to a small group of ESL students at a primary school in Hong Kong. He argued that mixed code is very much a characteristic of everyday language use by most Hongkongers and represents an important marker of their ethno-linguistic identity. In relation to language teaching, he suggested that "mixed code may be usefully adopted in teaching English in Hong Kong, rather than being shunned at all costs" (Sung 2010, p. 411).

However, research on code-switching and code-mixing in Hong Kong primary schools is missing. It is hoped that the current case studies of code-mixing/code-switching in three primary schools which we report on below can fill the gap, and the findings can contribute to the literature on the study of code-mixing/code-switching in multilingual education contexts. We also hope that our study can give insights to and inform educational policy-makers when drawing up language education policy for primary schools.

## 2.3 Language Policies in Hong Kong from the Past to Present

### *2.3.1 Bilingualism in Colonial Days*

In the early decades of the British colonial rule, Hong Kong adopted a laissez-faire approach to language education policy (Bolton 2011; Lai and Byram 2003; Luk 2000; Ng-Lun 1984; Pan 2000; Poon et al. 2013; Sweeting 1991). Two linguistically and culturally distinguished streams emerged in Hong Kong's educational system in the first 100 years under the British rule (1842–1941): an Anglo-Chinese stream which offered Western-style primary and secondary education through the medium of English, and a Chinese-medium stream which offered primary/elementary education which, in terms of content and method, was similar to that offered in Mainland China (So 1992). Before the Second Sino-Japanese War (1937–1945), Chinese language (i.e. oral Cantonese and written MSC) received much more attention in the privately-run Chinese schools and missionary schools that catered for the majority of the population than it did in the government-run elite schools (Adamson and Lai 1997, p. 89). In other words, English was the dominant language in an elite education system, although these schools did provide some training in classical Chinese (Kan and Adamson 2016). In the 1950s, Chinese language in schools was promoted (Kan and Adamson 2016).

During the 1970s and 1980s, primary education was dominated by Chinese, where everything was taught in Chinese except English itself (Kan et al. 2011; Lai and Byram 2003; Poon 2000; Sweeting 1991), while secondary education was dominated by English where all subjects except Chinese Language and Chinese History and Chinese Literature were supposed to be taught in English (Bray and Koo 2004; Johnson 1998; Lee 1997). In the 1980s, 90% of primary schools were CMI (Kan and Adamson 2010; Pan 2000), while the English-medium schools had become increasingly dominant at the secondary level (Bolton 2011). For example, the English-medium schools comprised 57.9% of secondary schools in 1960, but 87.7% by 1980 (Lee 1997, p. 166). More students – or their parents – sought Anglo-Chinese Schools rather than the Chinese Middle Schools because the medium of instruction was English (Sweeting 1991, pp. 74–75). A major reason for this was that six of the eight government-funded tertiary institutions are English medium and even the Chinese University of Hong Kong has recently significantly expanded its English medium classes (Kirkpatrick 2014).This gradual shift to English-medium schools chiefly reflected "the aspirations of parents who perceived English-medium education to confer stronger benefits in the labour market" (Bray and Koo 2004, p. 144).

The Green Paper in 1973 (the *Report of the Board of Education on the Proposed Expansion of Secondary Education*) recommended "Chinese should become the usual medium of instruction in lower forms of secondary schools; every effort should be made to develop good textbooks for all subjects written in Chinese, to

train teachers capable of instructing through the medium of Chinese" (Government Secretariat 1981, p. 146). The publication of the 1973 Green Paper is the first instance of the Hong Kong government formally proposing the use of Chinese as the medium of instruction in junior secondary schools (Poon 2010). However, the government soon changed its position because of public pressure (Sweeting 1991; Poon 2010). In the 1974 White Paper (*Secondary Education in Hong Kong over the Next Decade*) the government stated that "individual school authorities should decide themselves whether the medium of instruction should be English or Chinese for any subject in junior secondary forms……" (Government Secretariat 1981, p. 150). This reflected the government's laissez-faire approach to language education policy at the secondary level.

With the proclamation of the Sino-British Joint Declaration in 1984, there emerged major changes in language policy (Bray and Koo 2004, p. 144). For instance, the Report of the Working Group established to review language policy was published in 1989 and recommended that two of the aims of the educational system should be to ensure that: (1). "English or Chinese can be equally effectively used as a medium of instruction up to A level for students studying in the one language or the other" and (2). "English and Chinese are taught as subjects as effectively as possible, bearing in mind their roles as actual or future mediums of instruction for different groups of students" (Education Department 1989, pp. 73–74). However, according to Lai and Byram (2003, p. 316), "Bilingual schools, formally known as Anglo-Chinese schools were five times more numerous than the Chinese Middle schools" and before the Handover of 1997 about 90% of secondary school students were receiving their schooling officially through the medium of English (Sweeting 1991; So 1992).

### *2.3.2 Trilingualism and Mother-Tongue Policy in the Postcolonial Period*

As noted above, the Hong Kong government adopted the "biliterate and trilingual" (兩文三語) policy after the Handover of 1997. Under this policy, both Chinese and English are acknowledged as official languages; with Cantonese being acknowledged as the de facto official spoken variety of Chinese in Hong Kong. The policy also promoted Putonghua. The ultimate language goal of the new policy is to achieve trilingualism (Cantonese, English, and Putonghua) to facilitate exchange and communication with the Mainland and the outside world (Pan 2000; Zhang and Yang 2004). In the 1997 Policy Address, Tung Chee Hwa, the First Chief Executive of the HKSAR, reaffirmed "the goal for secondary school graduates to be proficient in writing English and Chinese and able to communicate confidently in Cantonese, English and Putonghua" (Tung 1997, para. 84). In the *1999 Policy Address* he said, "It is the SAR Government's goal to train our people to be truly biliterate and trilingual" (Tung 1999, para. 69).

In the same year, the Education Department (ED) issued the policy guidance 'The Medium of Instruction Guidance for Secondary Schools' (Education Department 1997) requiring all local public sector secondary schools, starting with the Secondary 1 intake of the 1998/99 school year, to use Chinese as the basic MoI. Any school intending to adopt English as the MoI had to provide sufficient information and justification for their decision to the Education Department. The above measures resulted in the 'mother-tongue teaching' policy and schools had to use Chinese as the basic medium of instruction in the belief that the use of Cantonese, the mother tongue of most students in the mainstream education system, would enhance student learning. The new policy represented a major change from previous practice, which was to leave the choice of MoI to schools; instead, the government took the lead in order to reverse the trend that favoured EMI (Kan and Adamson 2016). Accordingly, so-called 'firm guidance' from the government (So 1996, p. 45) was given to all schools in 1998 regarding the appropriate medium for them, based on information about the language proficiency of their Secondary One intakes obtained through the Medium of Instruction Assessment exercise. To Bolton (2011, p. 57), this "new 'firm' policy in promoting Chinese was the most significant change of language policy at the end of the colonial period".

The school curriculum was thus revised in 1998 to make Putonghua a compulsory subject in all primary and secondary schools, while Cantonese was to be used as the medium of instruction for teaching content subjects in Chinese-as-Medium-of-Instruction (CMI) primary and secondary schools. In 2000 Putonghua was made an elective subject in the public examination of the Hong Kong Certificate of Education Examination (HKCEE). It also needs to be noted here that parents were unhappy at the policy which reduced the number of EMI secondary schools, as they felt that their children would be much better placed to get into the local universities which, as noted above, six of which are EMI institution. As a result of consistent and increasing parent pressure, the government announced the 'fine-tuning' of the MoI policy which allowed CMI schools to teach more classes at the junior secondary level in English if they met certain conditions. As a consequence, many so-called CMI schools increased the numbers of classes taught in English with a corresponding reduction in the number of classes taught in Chinese (see Kan et al. 2011 for a full account). Needless to say, this increased use of EMI in junior secondary schools has had a washback effect on primary schools. This explains the parental demand for more EMI classes at primary level which we report on in later chapters.

Despite the government's 'firm guidance' about which medium of instruction the schools should adopt, no actual policy or practical guidelines on how to implement a language policy in schools which would enable students to develop as trilingual and bilingual citizens was provided. Hong Kong primary schools therefore do not have an agreed approach or method for implementing trilingual education (Wang and Kirkpatrick 2013). Each school has been left to its own devices to trial how to implement a trilingual and biliterate policy. It therefore remains unclear how the "biliterate and trilingual" policy and "mother-tongue" policy are implemented in Hong Kong primary schools. To understand, compare and contrast how primary

schools were implementing the policy and to identify best practice was the motivation for our study. The following chapter outlines the methodology we adopted.

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