

Encyclopedia of
Language and Education
Series Editor: Stephen May

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Ofelia García · Angel M.Y. Lin
Stephen May *Editors*

Bilingual and Multilingual Education

Third Edition

 Springer

Encyclopedia of Language and Education

Series Editor

Stephen May

Faculty of Education and Social Work

The University of Auckland

Auckland, New Zealand

In this third, fully revised edition, the 10-volume *Encyclopedia of Language and Education* offers the newest developments, including an entirely new volume of research and scholarly content, essential to the field of language teaching and learning in the age of globalization. In the selection of topics and contributors, the Encyclopedia reflects the depth of disciplinary knowledge, breadth of interdisciplinary perspective, and diversity of sociogeographic experience in the language and education field.

Throughout, there is an inclusion of contributions from non-English speaking and non-Western parts of the world, providing truly global coverage. Furthermore, the authors have sought to integrate these voices fully into the whole, rather than as special cases or international perspectives in separate sections.

The Encyclopedia is a necessary reference set for every university and college library in the world that serves a faculty or school of education, as well as being highly relevant to the fields of applied linguistics and sociolinguistics. The publication of this work charts the further deepening and broadening of the field of language and education since the publication of the first edition of the Encyclopedia in 1997 and the second edition in 2008.

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Bilingual and Multilingual Education

Third Edition

With 3 Figures and 6 Tables

 Springer

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Editor in Chief's Introduction to the "Encyclopedia of Language and Education"

This is one of ten volumes of the *Encyclopedia of Language and Education* published by Springer. The *Encyclopedia* – now in this, its third edition – is undoubtedly the benchmark reference text in its field. It was first published in 1997 under the general editorship of the late David Corson and comprised eight volumes, each focused on a single, substantive topic in language and education. These included: language policy and political issues in education; literacy; oral discourse and education; second language education; bilingual education; knowledge about language; language testing and assessment; and research methods in language and education.

In his introductory remarks, David made the case for the timeliness of an overarching, state-of-the-art, review of the language and education field. He argued that the publication of the *Encyclopedia* reflected both the internationalism and interdisciplinarity of those engaged in the academic analysis of language and education, confirmed the maturity and cohesion of the field, and highlighted the significance of the questions addressed within its remit. Contributors across the first edition's eight volumes came from every continent and from over 40 countries. This perhaps explains the subsequent impact and reach of that first edition – although no one (except, perhaps, the publisher!) quite predicted its extent. The *Encyclopedia* was awarded a Choice Outstanding Academic Title Award by the American Library Association and was read widely by scholars and students alike around the globe.

In 2008, the second edition of the *Encyclopedia* was published under the general editorship of Nancy Hornberger. It grew to ten volumes as Nancy continued to build upon the reach and influence of the *Encyclopedia*. A particular priority in the second edition was the continued expansion of contributing scholars from contexts outside of English-speaking and/or developed contexts, as well as the more effective thematic integration of their regional concerns across the *Encyclopedia* as a whole. The second edition also foregrounded key developments in the language and education field over the previous decade, introducing two new volumes on language socialization and language ecology.

This third edition continues both the legacy and significance of the previous editions of the *Encyclopedia*. A further decade on, it consolidates, reflects, and expands (upon) the key issues in the field of language education. As with its predecessors, it overviews in substantive contributions of approximately

5000 words each, the historical development, current developments and challenges, and future directions, of a wide range of topics in language and education. The geographical focus and location of its authors, all chosen as experts in their respective topic areas, also continues to expand, as the *Encyclopedia* aims to provide the most representative international overview of the field to date.

To this end, some additional changes have been made. The emergence over the last decade of "superdiversity" as a topic of major concern in sociolinguistics, applied linguistics, and language education is now a major thread across all volumes – exploring the implications for language and education of rapidly changing processes of migration and transmigration in this late capitalist, globalized world. This interest in superdiversity foregrounds the burgeoning and rapidly complexifying uses of language(s), along with their concomitant deconstruction and (re)modification, across the globe, particularly (but not exclusively) in large urban environments. The allied emergence of multilingualism as an essential area of study – challenging the long-held normative ascendancy of monolingualism in relation to language acquisition, use, teaching, and learning – is similarly highlighted throughout all ten volumes, as are their pedagogical consequences (most notably, perhaps, in relation to translanguaging). This "multilingual turn" is reflected, in particular, in changes in title to two existing volumes: *Bilingual and Multilingual Education* and *Language Awareness, Bilingualism and Multilingualism* (previously, *Bilingual Education* and *Language Awareness*, respectively).

As for the composition of the volumes, while ten volumes remain overall, the *Language Ecology* volume in the second edition was not included in the current edition, although many of its chapter contributions have been reincorporated and/or reworked across other volumes, particularly in light of the more recent developments in superdiversity and multilingualism, as just outlined. (And, of course, the important contribution of the *Language Ecology* volume, with Angela Creese and the late Peter Martin as principal editors, remains available as part of the second edition.) Instead, this current edition has included a new volume on *Language, Education, and Technology*, with Steven Thorne as principal editor. While widely discussed across the various volumes in the second edition, the prominence and rapidity of developments over the last decade in academic discussions that address technology, new media, virtual environments, and multimodality, along with their wider social and educational implications, simply demanded a dedicated volume.

And speaking of multimodality, a new, essential, feature of the current edition of the *Encyclopedia* is its multiplatform format. You can access individual chapters from any volume electronically, you can read individual volumes electronically and/or in print, and, of course, for libraries, the ten volumes of the *Encyclopedia* still constitute an indispensable overarching electronic and/or print resource.

As you might expect, bringing together ten volumes and over 325 individual chapter contributions has been a monumental task, which began for me at least in 2013 when, at Nancy Hornberger's invitation, Springer first approached me about the Editor-in-Chief role. All that has been accomplished since would simply not have occurred, however, without support from a range of key sources. First, to Nancy Hornberger, who, having somehow convinced me to take on the role, graciously

agreed to be Consulting Editor for the third edition of the *Encyclopedia*, providing advice, guidance, and review support throughout.

The international and interdisciplinary strengths of the *Encyclopedia* continue to be foregrounded in the wider topic and review expertise of its editorial advisory board, with several members having had direct associations with previous editions of the *Encyclopedia* in various capacities. My thanks to Suresh Canagarajah, William Cope, Viv Edwards, Rainer Enrique Hamel, Eli Hinkel, Francis Hult, Nkonko Kamwangamalu, Gregory Kamwendo, Claire Kramersch, Constant Leung, Li Wei, Luis Enrique Lopez, Marilyn Martin-Jones, Bonny Norton, Tope Omoniyi, Alastair Pennycook, Bernard Spolsky, Lionel Wee, and Jane Zuengler for their academic and collegial support here.

The role of volume editor is, of course, a central one in shaping, updating, revising, and, in some cases, resituating specific topic areas. The third edition of the *Encyclopedia* is a mix of existing volume editors from the previous edition (Cenoz, Duff, King, Shohamy, Street, Van Deusen-Scholl), new principal volume editors (García, Kim, Lin, McCarty, Thorne), and new coeditors (Lai, Or). As principal editor of *Language Policy and Political Issues in Education*, Teresa McCarty brings to the volume her longstanding interests in language policy, language education, and linguistic anthropology, arising from her work in Native American language education and Indigenous education internationally. For *Literacies*, Brian Street brings a background in social and cultural anthropology, and critical literacy, drawing on his work in Britain, Iran, and around the globe. As principal editors of *Discourse and Education*, Stanton Wortham has research expertise in discourse analysis, linguistic anthropology, identity and learning, narrative construction, media, and the new Latino diaspora, while Deoksoon Kim's research has focused on language learning and literacy education, and instructional technology in second language learning and teacher education. For *Second and Foreign Language Education*, Nelleke Van Deusen-Scholl has academic interests in linguistics and sociolinguistics and has worked primarily in the Netherlands and the United States. As principal editors of *Bilingual and Multilingual Education*, Ofelia García and Angel M. Y. Lin bring to the volume their internationally recognized expertise in bilingual and multilingual education, including their pioneering contributions to translanguaging, along with their own work in North America and South East Asia. Jasone Cenoz and Durk Gorter, principal editors of *Language Awareness, Bilingualism, and Multilingualism*, bring to their volume their international expertise in language awareness, bilingual and multilingual education, linguistic landscape, and translanguaging, along with their work in the Basque Country and the Netherlands. Principal editor of *Language Testing and Assessment*, Elana Shohamy is an applied linguist with interests in critical language policy, language testing and measurement, and linguistic landscape research, with her own work focused primarily on Israel and the United States. For *Language Socialization*, Patricia Duff has interests in applied linguistics and sociolinguistics and has worked primarily in North America, East Asia, and Central Europe. For *Language, Technology, and Education*, Steven Thorne's research interests include second language acquisition, new media and online gaming environments, and theoretical and empirical

investigations of language, interactivity, and development, with his work focused primarily in the United States and Europe. And for *Research Methods in Language and Education*, principal editor, Kendall King, has research interests in sociolinguistics and educational linguistics, particularly with respect to Indigenous language education, with work in Ecuador, Sweden, and the United States. Finally, as Editor-in-Chief, I bring my interdisciplinary background in the sociology of language, sociolinguistics, applied linguistics, and educational linguistics, with particular interests in language policy, Indigenous language education, and bilingual education, along with my own work in New Zealand, North America, and the UK/Europe.

In addition to the above, my thanks go to Yi-Ju Lai, coeditor with Kendall King, and Iar Or, coeditor with Elana Shohamy. Also to Lincoln Dam, who as Editorial Assistant was an essential support to me as Editor-in-Chief and who worked closely with volume editors and Springer staff throughout the process to ensure both its timeliness and its smooth functioning (at least, to the degree possible, given the complexities involved in this multiyear project). And, of course, my thanks too to the approximately 300 chapter contributors, who have provided the substantive content across the ten volumes of the *Encyclopedia* and who hail from every continent in the world and from over 50 countries.

What this all indicates is that the *Encyclopedia* is, without doubt, not only a major academic endeavor, dependent on the academic expertise and goodwill of all its contributors, but also still demonstrably at the cutting edge of developments in the field of language and education. It is an essential reference for every university and college library around the world that serves a faculty or school of education and is an important allied reference for those working in applied linguistics and sociolinguistics. The *Encyclopedia* also continues to aim to speak to a prospective readership that is avowedly multinational and to do so as unambiguously as possible. Its ten volumes highlight its comprehensiveness, while the individual volumes provide the discrete, in-depth analysis necessary for exploring specific topic areas. These state-of-the-art volumes also thus offer highly authoritative course textbooks in the areas suggested by their titles.

This third edition of the *Encyclopedia of Language and Education* continues to showcase the central role of language as both vehicle and mediator of educational processes, along with the pedagogical implications therein. This is all the more important, given the rapid demographic and technological changes we face in this increasingly globalized world and, inevitably, by extension, in education. But the cutting-edge contributions within this *Encyclopedia* also, crucially, always situate these developments within their historical context, providing a necessary *diachronic* analytical framework with which to examine *critically* the language and education field. Maintaining this sense of historicity and critical reflexivity, while embracing the latest developments in our field, is indeed precisely what sets this *Encyclopedia* apart.

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Introduction to Volume “Bilingual and Multilingual Education”

We have chosen to write a more conceptual introduction to this volume, based on the contributions, which we have titled “Extending Understandings of Bilingual and Multilingual Education” and which follows. Here we offer just an orientation to Vol. 5 for the reader.

The volume starts with what we consider are the general foundations to understanding bilingual and multilingual education (Sect. 1). We have chosen to start with the aspects that affect the development and implementation of all the cases of bilingual education here included – the sociopolitical aspects (Flores and Bale). These sociopolitical aspects are related to the aspects of language policy (Mwaniki, Arias, and Wiley) and of language rights (Skutnabb-Kangas). Wright and Baker then synthesize all the key concepts in the field, while May offers a review of research findings on bilingual education.

The volume then considers language and literacy, core aspects of bilingual education (Sect. 2). We start with the seminal contribution of Jim Cummins on language transfer and linguistic interdependence, followed by a chapter on translanguaging that focuses on the fluid language practices of bilingual students and not simply on the language constructions of political states and schools (García and Lin). Because of the importance of multimodalities in the languages of the deaf, we include a chapter on signed languages (Bagga-Gupta) before one that touches on aspects of biliteracy (Schwinge). Bilingual individuals have different multicompetences (Jessner) and identities (Choi), and two chapters are devoted to those topics. Finally, because schooling for the deaf is not covered to the same extent in the geographical case studies that follow, we include a chapter that using the deaf population raises the issue of separate or integrated schooling for different bilingual populations (Tang).

Sections 3, 4, 5, and 6 describe bilingual education efforts in different parts of the world and dealing with different populations. We have decided to start with Asia and the Middle East (Sect. 3) because this is an area that has received little attention in the North American and European literature and yet has vast experience with bilingual education. The issues are very different, as are the populations. We present cases in Hong Kong (Pérez-Milans), China (Gao and Wang), and then in Pakistan and India (Mahboob and Jain), the Philippines (Tupas and Martin), and Central Asia (Bahry,

Niyozov, Shamatov, Ahn, and Smagulova). We end with a case study of bilingual education in the Middle East and North Africa (Zakharia).

Continuing with the African continent that was considered in the chapter on the Middle East and North Africa, Sect. 4 includes both Africa and the Pacific. We start with a contribution on South Africa (Makalela) and another one on sub-Saharan Africa (Bunyi and Schroeder). We then consider Aotearoa/New Zealand (Hill), Australia (Lo Bianco and Slaughter), and the Pacific Islands (Geraghty).

The indigenous movements in Aotearoa/New Zealand, parts of Australia and the Pacific Islands that are considered in Sect. 4 of the book, are then put in conversation with those in the Americas in Sect. 5. A comprehensive chapter on indigenous bilingual education in Latin America is presented by López and Sichra, followed by one on bilingual education for indigenous people in Mexico (Hamel). We contrast these two chapters with the one by de Mejía who writes about the same geographic region (Latin America) but about bilingual education efforts in dominant languages. The dialogue on bilingual education for indigenous people continues with the chapter by McIvor and McCarty, this time from a Canadian and a US point of view. We include a chapter on bilingual education in the USA (Gándara and Escamilla) and in Canada (Dicks and Genesee), perhaps some of the best-known cases of bilingual education in the world.

We end the volume with Europe, looking first at bilingual education in dominant languages (Hélot and Cavalli) and migrant languages (Sieres and Van Avermaet). And we bring closure to the volume with the chapter by Vila, Lasagaster, and Ramallo, which explores the tensions between languages of autochthonous minorities and dominant languages in one European state.

The volume is not exhaustive but aims to be comprehensive. The conceptual chapter that follows, "Extending Understandings of Bilingual and Multilingual Education," attempts to move the field forward by identifying commonalities and tensions that the reader will find made explicit in the chapters that follow.

We want to end by thanking the general editor of the series, Stephen May, and his assistant, Lincoln Dam, for the guidance we have received, as well as Karin Bartsch from Springer. External reviewers read and provided advise to the authors of each of the chapters. We are very grateful to them. And we also want to thank Katie Entigar and Sara Vogel, doctoral students at the Graduate Center, who offered much support. Thank you all!

New York
Hong Kong

Ofelia García
Angel M. Y. Lin

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Angel M. Y. Lin is a full professor at the Faculty of Education, University of Hong Kong. She received her Ph.D. from the Ontario Institute for Studies in Education, University of Toronto, Canada, in 1996. Since then her research and teaching have focused on classroom discourse analysis, bilingual and multilingual education, academic literacies, and language policy and planning in postcolonial contexts. She has published 6 research books and over 90 research articles and serves on the editorial boards of leading international research journals including *Applied Linguistics*, *TESOL Quarterly*, *International Journal of Bilingual Education and Bilingualism*, *Critical Inquiry in Language Studies*, *Language and Education*, and *Pragmatics and Society*.



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Extending Understandings of Bilingual and Multilingual Education

Ofelia García and Angel M. Y. Lin

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Abstract

Our traditional understandings of bilingual and multilingual education have been disrupted, as scholars in different parts of the world have questioned some of them. In this chapter we extend the definition of bilingual education to the use of diverse language practices to educate, and we identify the different ideologies that lead to diverse ways of doing bilingual education around the world. We show how bilingual education has to respond to the language practices of people, taking on a social justice purpose, and reinforcing the idea that language is used by people to communicate and participate in multiple contexts and societies.

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This chapter brings some order to the differences in perspectives that follow in this volume, without negating them. We discuss some of the shared understandings of the authors—the goodness of bilingual education; its relationship to social, political and economic factors including the global neoliberal economy and the state; its relationship to power and advocacy; its engagement of families and communities; and its lack of material resources. And we summarize what some of the authors in this volume claim would be necessary for bilingual education to adapt to the changing world of the 21st century—going beyond named languages and going beyond traditional models and types of bilingual education.

Keywords

Bilingual education models • Families • “Named” languages • Neoliberal economy • Translanguaging

Introduction

In the twenty-first century, our traditional understandings of bilingual and multilingual education have been disrupted, as scholars in different parts of the world have questioned some of them. *Bilingual education* has been traditionally defined as the use of two languages in education, often with the purpose of making students bilingual and biliterate, but other times, especially in educating language minoritized people, simply to enhance comprehension and develop linguistic competence in a dominant language (Baker 2011). Scholars often use the term *multilingual education* to refer to the use of more than two languages in education, an important development in a globalized world where two languages in education may not be enough. But the term multilingual education is also used differently. It is used to refer to the teaching of more than two languages to make students at least trilingual (Cenoz 2009) but also to the use of the many languages of students in classrooms today, often language minoritized students, to make subject matter comprehensible and enhance the development of a dominant language (See “► [Teaching for Transfer in Multilingual School Contexts](#)” by Cummins, this volume). The title of this volume, *Bilingual and Multilingual Education*, reflects the necessary extension of bilingual education to also encompass multilingual education. Many of our authors use bilingual education as the umbrella term, also encompassing multilingualism. For example, Mwaniki, Arias, and Wiley (“► [Bilingual Education Policy](#),” this volume) define *bilingual education* as “any attempt to strategically employ *two or more languages* in instruction for either the purpose of linguistic accommodation for students who do not speak the language of instruction or to promote the learning of more than one language to achieve individual, community-based, societal, or political goals.”

In this volume we adopt a definition of bilingual education as *the use of diverse language practices to educate*. As the contributions in this volume make clear, the use of diverse language practices responds to different language ideologies, some

that see language difference as a problem (leading to transitional bilingual education programs), some that see it as a resource (leading to developmental bilingual education programs) or even a right (leading to developmental maintenance programs) (see Ruiz 1984). In some cases, the diverse language practices used in bilingual education correspond to those used by the students in language minoritized homes and/or communities. In other cases, teachers' use of diverse language practices correspond to those associated with other people in different societies and communities of practice and not to those that were originally part of the students' linguistic repertoire. Our use of "diverse language practices" instead of "diverse languages" is purposeful. It points to the idea that bilingual education has to respond to the language practices of *people* and not simply to those that political states or national groups and their schools have constructed as autonomous and bound languages. Bilingual education then takes on a *social justice purpose*, reinforcing the idea that language is used by people to communicate and participate in multiple contexts and societies. A bilingual education that extends children's own language repertoire by appropriating other linguistic features enables the child to be an equal participant in many communities of practice, to truly become what we traditionally call bilingual or multilingual. By upholding the terms "bilingual" and "multilingual" despite our own heteroglossic theoretical lens, we recognize the very real and material effect of named languages on people. Our volume recognizes the importance of named languages for the field of bilingual and multilingual education and for children and communities, while encouraging scholars to think differently about language, in teaching for bilingualism and multilingualism.

This volume also reflects the tensions that we are experiencing in the field today – What is language? What is bilingualism? Is there a difference between bilingual, multilingual, and mother tongue education? What is the purpose of bilingual education? Whose interest does it serve? What are the parameters of the field? These and many others are questions that readers will have, as they engage with the chapters in this volume. Depending on the different perspective of the author, a result of diverse histories and contexts for the work, these questions will be answered differently. We have purposely decided on a volume that includes and puts alongside each other different perspectives, for we believe that it is important to see bilingual and multilingual education from many different angles. For us, human intention is paramount, and it turns out that different people in various contexts need different things from an education that leverages diverse language practices.

In this chapter, we attempt to bring some order to the differences in perspectives without negating them. What can we then say are the shared understandings that the authors of this volume have and what understandings are being extended? What are the principles of bilingual education that we can uphold when reading this volume? We discuss here some of these shared understandings – the goodness of bilingual education; its relationship to social, political, and economic factors including the global neoliberal economy and the state; its relationship to power and advocacy; its engagement of families and communities; and its lack of material resources. We then turn to some extensions that some of the authors included here claim would be necessary to adapt to the changing world of the twenty-first century – going beyond

named languages and going beyond accepted models and types of bilingual education.

The Good of Bilingual Education

All scholars here represented, hailing from all over the world, have one understanding in common – *leveraging the language practices of the children who are being educated is a good thing*. It is good whether the children are immigrants, refugees, regional minorities, indigenous peoples, deaf, hearing, or majorities. This principle reflects that of many proponents of bilingual education. For example, in 1976, Joshua A. Fishman writing about international bilingual education asserts that bilingual education is good for majorities, good for minorities, good for language learning, and good for education. Simply teaching in a monolingual mode that reflects the language practices legitimized by the dominant group or the state is harmful to children. It results in academic failure, linguistic and identity insecurities, and the inability to enjoy the critical metalinguistic awareness that enables students to become critical analysts and users of language in society. And of course, it results in restricting the language repertoire of children to that sanctioned and upheld by the political state in which the education system functions, most of the time resulting in monolingualism, or in what we might call restricted bilingualism, meaning that students are taught to suppress some of the features of their repertoire as inappropriate instead of expanding them fully. Wright and Baker (“► [Key Concepts in Bilingual Education](#),” this volume) summarize the results of research on bilingual education:

Overall, research ranging from evaluation studies, comparative analyses, and meta analyses have generally found that bilingual approaches are superior to monolingual approaches, and that longer-term programs aiming for bilingualism and biliteracy have more positive linguistic and academic outcomes for students than do short-term (i.e., transitional) program models.

Tupas and Martin (“► [Bilingual and Mother Tongue-Based Multilingual Education in the Philippines](#),” this volume) claim that the most successful attempts in bilingual education “have been those which *empower local people*. . .to decide on the social development needs of their communities” (our emphasis). Thus, good bilingual education always empowers those who are being educated.

The Interrelationship of Bilingual Education to Social, Political, and Economic Factors

Our authors do not simply see bilingual education as an educational approach that just develops bilingual proficiency or even that just serves students. Although bilingual education has been always seen in interrelationship with social, political,

and economic factors, our understandings of linguistic ideology have penetrated scholarship on bilingual education. Our authors examine how language functions in bilingual education as a proxy for other social and material conflicts. As Holborow (1999) has noted in speaking about English: “Like railways, language can be used for many purposes, and not always those laid down by its British engineers” (p. 92). *Bilingual education is interrelated to social, political, and economic factors*, especially to those of the political state in which it operates, but also to the interests of a global neoliberal economy (see especially “► [Sociopolitical Issues in Bilingual Education](#)” by Flores and Bale, this volume). All the contributions in this volume point to the complex relationship that exists between political states and their indigenous, colonized, and minoritized communities.

Because languages may be equal, but as Dell Hymes (1992) well reminds us, they hold different values and power in society; it turns out that all bilingual education efforts suffer from the societal hierarchization of languages, which is, of course tied to the political power of the state or to the people who speak the different languages. Dominant spoken languages hold much more weight than all minoritized languages, whether indigenous, immigrant, regional, or signed languages. Instead of equalizing the power of languages, most traditional bilingual education programs give preference to the language of more power. The social status of the minoritized language and the historical background of the minoritized group determine the general support from members of society, and especially of dominant groups. Thus, not all groups fare equally in bilingual education, even in the same geographic territory and with the same macro-societal policies. The dominance of one language or another itself is no guarantee of success in bilingual education, for this is experienced differently in various contexts with different political profiles and by groups of students with different social characteristics. We see this throughout the many contributions in this volume.

The interrelationship of bilingual education to social, political, and economic factors is also evident in the role that *elites* play in carrying it out. Elites in many societies crave bilingual education for the benefit of their own children, but only in dominant languages or varieties that they consider societal resources. This is the case of many of the bilingual education programs in Latin America (See “► [Bilingual Education in Dominant Languages in South America](#)” by de Mejía, this volume) and in Europe (See “► [Bilingual Education in Europe: Dominant Languages](#)” by Hélot and Cavalli, this volume).

Within many bilingual education programs only the “standard” variety of the languages are included. In the former British colonies, only certain “standard” varieties of English have become the linguistic capital of the internal elite, and there is the tiering of English proficiencies correlating with job and economic opportunities (e.g., in Hong Kong, Singapore, India, Pakistan, the Philippines). This “standard” variety of English is also held by the internal elite in other contexts where English has become the prestigious second, third, or fourth language to develop for middle class children through CLIL programs (e.g., in Europe; more on this below). In the USA, many bilingual education programs claim to include Spanish and yet stigmatize the bilingual practices that many of the bilingual students

bring into their “Spanish.” The acceptance of only the “standard,” even as bilingual education programs include a minoritized language, show the reluctance of many educators to include linguistic practices that deviate from what is considered the only way to speak the minoritized language. In this struggle, the linguistic practices of the minoritized community and their children are often stigmatized, perhaps giving children even a greater sense of linguistic insecurity than if their home language had been totally excluded. Elites also play a role in maintaining the status quo, of both dominant and minoritized languages, by restricting education to their own language practices, excluding others and maintaining power. Powerful local elites are also complicit in imperialist and colonial designs that rob all children of a meaningful bilingual education.

Bilingual Education and the Global Neoliberal Economy

The interrelationship of bilingual education especially to economic factors is evident in its concern with the neoliberal global economy in which it operates. As Heller (2011) has said, “in the globalized new economy, communication is central to the functioning of the market; language, culture, and identity are tied to the emergence of niche markets and added value, in a process of localization that globalization has made possible, indeed necessary” (p. 20). In many of the contexts in which bilingual education operates bilingualism is upheld simply because of its market value.

Bilingual education scholars share both an interest and a preoccupation with the growing importance of English as the dominant language in major sociocultural, political, economic, legal, and educational events. On the one hand, this in itself propels the importance of bilingual education, as many people in the world clamor for the need to make their children English-speaking. On the other hand, the fascination with English has consequences for the development and maintenance of minoritized languages. For example, in discussing the languages of the autonomous regions of Spain, Vila, Lasagaster, and Ramallo (“► [Bilingual Education in the Autonomous Regions of Spain](#),” this volume) consider the effects of the increased popularity of Content and Language Integrated Learning (CLIL) classes in English on the students’ acquisition and development of Basque, Catalan, and Galician. Not all authors are preoccupied with the spread of English, but all share the fear of a dominant language threatening the development of minoritized languages in bilingual and multilingual programs.

Our growing globalization means that political states or national groups are not the only ones making language policies. Supranational bodies are also now in position to make language education policies. One case in point is the UN Conventions to protect the rights of indigenous multilingual learners. But as Skutnabb-Kangas (2000; “► [Language Rights and Bilingual Education](#),” this volume) points out, these have not been well implemented or enforced. These policies generally support only negative linguistic human rights, instead of positive ones, meaning that they only prohibit discrimination on the basis of language, rather than promoting bilingual and multilingual education programs for the benefit of all. The global

neoliberal economy transcends political states, but it works always in its own favor, giving only limited accessibility to minoritized languages that may empower local communities.

Economic globalization has also had, as a result, the *growing mobility of populations*, as well as their growing transnationalism. In some cases, these migrations threaten a dominant group. In others, however, the increased migrations of a global world also threaten a minoritized group. This is, for example, the case of the Pasifika of New Zealand (See “► [Bilingual Education in Aotearoa/New Zealand](#)” by Hill, this volume) or of the new students from South Asia coming into Hong Kong (See “► [Bilingual Education in Hong Kong](#)” by Pérez-Milans, this volume). This greater mobility also impacts the ways in which traditional bilingual education has been conducted with indigenous groups. This is the case, for example, of the intercultural bilingual education programs for indigenous peoples in Latin America. Although they were originally conceived for rural populations, they are increasingly being carried out in the urban settings in which the indigenous people now live (see “► [Indigenous Bilingual Education in Latin America](#)” by López and Sichra, this volume).

This greater mobility occurs not only through physical moves and migrations across geographic areas. People with different language practices also have an *increased presence in virtual worlds* because of new technologies. Whereas powerless minoritized groups have been geographically isolated or socially marginalized in the past, our technological advances have made their presence well known. Education systems that in the past ignored the presence of language minoritized groups, now have to contend with their ubiquitous presence – in classrooms but also on the web, on the radio, on television. These diverse language practices are registered and divulged widely beyond the speakers’ own communities or societies. Bilingual education has also acquired an important role in sustaining language practices that are considered endangered. Many minoritized communities use bilingual education to ensure that their languages are maintained, and as we see in this volume, the success of the revitalization of Māori and of Hawaiian is often attributed to the “language nests” bilingual programs for their young.

At the same time, the greater movement of people means that *students’ identities* have also become more fluid and complex (see “► [Identity, Transnationalism, and Bilingual Education](#)” by Choi, this volume). In contact with majority groups, and with greater access to majority languages, some minoritized students develop attitudes of linguistic insecurity and stigmatize their own language practices, preferring those of dominant groups. This is the case that Tupas and Martin outline in the chapter here about the Philippines (see “► [Bilingual and Mother Tongue-Based Multilingual Education in the Philippines](#)”) with students’ holding more negative attitudes towards their own language practices and preferring the colonial (English) and national (Filipino) language.

The increased visibility of language minoritized populations also has to do, of course, with *social movements* that occurred in the entire world in the second half of the twentieth century. Although many have observed the fall of these social and ethnic movements as the century came to a close (what Joshua A. Fishman has called

The Rise and Fall of The Ethnic Revival, 1985), the impact of these social movements has awakened a consciousness to diversity and to the inequalities that are not only based on social class, race, ethnicity, and gender, but also language.

Bilingual Education and the State

Despite our perspective as editors that bilingual education needs to pay attention to the diverse language practices of *people* and our consciousness of the growing power of the globalized neoliberal economy, we decided early on to commission chapters that describe bilingual education efforts within different political states or territories. Although we recognize that a neoliberal economy where market capitals have expanded globally has led to a disruption of the modernist link between language and territory, all the authors here included agree that *schools operate in the shadows of nation-state ideologies*. These ideologies are many times determined, or at least impacted, by historical and sociopolitical contexts and the geographies in which they are carried out.

Despite the many different actions of educators and students (see, for example, Menken and García 2010), actors are always negotiating top-down state policies, whether explicit or implicit. Scholars also agree that it is much easier to operate bilingual education programs when the macro-societal language policies support the efforts of local schools. Schools reflect the society in which they operate, and so it is important to view the different approaches to bilingual and multilingual education in the tension produced from top-down policies as negotiated from the bottom-up and vice versa.

Language education policies promoted by states, as we said above, are necessary to promote bilingual education programs, but they are not enough. Even policies that are said to favor language minoritized peoples are often unresponsive to their plurilingual societal realities. Many of the bilingual education scholars here included attest to this. For example, the tripartite language policies of India seem to perpetuate the hierarchization of its languages (See “► [Bilingual Education in India and Pakistan](#)” by Mahboob and Jain, this volume). Even when these policies are benevolent towards minority groups, they are often based on Western notions of multilingualism – the idea of multiple monolingualisms (Banda 2009). As Mwaniki, Arias, and Wiley (“► [Bilingual Education Policy](#),” this volume) say, the result of these policies is then that “languages which have existed side by side for significant periods of time, complementing and supplementing each other in a multilingual symbiosis, are suddenly cast as competing for spaces.” The tension is then that multilingualism is socially recognized only as distinctive monolingual enclaves, when the sociolinguistic reality is a lot more fluid and complex. This is especially so in the case of the Deaf (see “► [Signed Languages in Bilingual Education](#)” by Bagga-Gupta, “► [Sign Bilingualism in Deaf Education](#)” by Tang, this volume).

Policy-makers also often formulate a policy which they have no intention of implementing. This is what Bamgbose (1999) calls “implementation avoidance strategy.” Macro-language policies that support and officialize minority languages

are not a guarantee that these languages will be used for official purposes, and especially in education. Makalela (“► [Bilingualism in South Africa: Reconnecting with Ubuntu Translanguaging](#),” this volume) reminds us that although 11 languages have been included in the constitution of South Africa, indigenous African languages are neglected, especially in education, a result of the unequal power of the people who speak them after having been subjected to racial (and linguistic) apartheid.

Because of the different histories, traditions, and positions of languages within political states and national groups, the different contexts still hold sway in how bilingualism is viewed. As Hélot and Cavalli (See “► [Bilingual Education in Europe: Dominant Languages](#),” this volume) make clear, it is not the same to carry out bilingual education efforts in border contexts, in colonial contexts, in indigenous contexts, in immigration contexts, or in contexts with strong language education traditions, including core “foreign” language education, as well as Content and Language Integrated Learning (CLIL). Furthermore, it is not the same to carry out bilingual education efforts in more democratic societies than in more authoritarian ones.

Bilingual Education, Power, and Advocacy

All the authors in this volume attest to the *contentious* and *conflictive nature* of bilingual and multilingual education, regardless of social contexts. This leads to scholarship that is not neutral. Instead, many bilingual education scholars adopt an *advocacy position*.

One reason for the contentious nature of bilingual education is that various groups and societies want different things for different children. For example, for some societies (and parents) bilingual education fulfills the nation’s desire for internalization. For others, it responds to the need for a national standard language for national unity and pride. Yet for others, it has to do with the development of a minoritized or endangered language. Sometimes these three goals exist within the same society. And dominant groups gladly support bilingual education efforts to ensure their own children’s bi- or trilingualism and bi- or trilateracy, while perceiving the same bilingual education efforts of language minoritized communities as threatening national stability.

Another conflict in bilingual education scholarship has to do with people who perceive that multilingualism is important to participate in neoliberal global markets, whereas others see it only for national identity and cultural authenticity. Some scholars, such as Gándara and Escamilla (“► [Bilingual Education in the United States](#),” this volume) advocate for bilingual education by promoting a rationale that includes both global and local benefits and that include gains to both the market and individuals’ cognitive and sociopsychological well-being. Speaking about the USA, Gándara and Escamilla say, “Bilingual instruction would not only increase their academic achievement, social and psychological well being, but would also strengthen both their own labor market prospects and the economy of the nation.” These are at times contradictory wishes, for dominant groups are not always willing

to have others' children achieve educational success, and other children's linguistic resources are often viewed as sub-standard (e.g., the Spanish spoken by Latino children in the USA is often not seen as valuable "standard" Spanish).

In most contexts, the consumers of bilingual and multilingual education come from three main sectors: indigenous or autochthonous peoples, migrant communities, and majority people. Often these people have different wishes and educational goals for their own children. Within one society, this might cause conflict. This is the case of almost all cases explored in this volume, for example, Central Asia (Bahry et al.), the Middle East and North Africa (Zakharia), Pacific Islands (Geraghty et al.), or Western Europe (Sierens and Avermaet and Hélot and Cavalli).

In most contexts, bilingual education is a balancing act, always mindful of what the majority society wants, while attempting to also serve minoritized populations. The chapters here show all the compromises that bilingual education has had to make in order to survive. One example of this tendency to compromise is the development of so-called "two-way dual language" education in the USA. These programs carefully avoid any mention of "bilingual," a term that has acquired negative connotations in the USA (García 2009). Another example is the tendency to support bilingualism as a resource, in many ways giving in to the demands of a neoliberal economy. As Petrovic argues (2005), adopting the language-as-resource orientation bolsters the market forces that work against minoritized peoples and that reinforce, rather than negate, the social power imbalances between majorities and minoritized communities.

To avoid all these sociopolitical trappings, scholarship in bilingual education often operates in third *spaces* and avoids dichotomies. For example, Bagga-Gupta ("► [Signed Languages in Bilingual Education](#)," this volume), speaking about deaf education uses "third position" to refer to neither privileging technically/medically based oral methods nor visually/manually based sign communication.

All the scholars here included agree on a point of view that seems contradictory on the surface. All agree, as we said before, on the efficacy of bilingual education, and yet all *call for more rigorous research* to support their efforts. It seems that the results of bilingual education continue to be controversial, especially for the wider public and policy-makers. This has to do, as we have been saying, with the fact that elites within societies protect the place of their own language practices in education, a guarantee that their children will continue to perform better in assessments of proficiency and academic competence than those who have different language practices. How to make the research evidence convincing to all is perhaps the one concerted wish of all bilingual education scholars.

All of these chapters show the *tentative and controversial nature* of bilingual education in the world. In describing the different developments of bilingual education in various historical periods in different contexts, all the authors point to the tenuous existence of bilingual education in their societies. Not only do the chapters clearly demonstrate the tensions that exist within understandings and implementation of bilingual education, but also its imperiled and contested nature. Together the

chapters give us the impression that despite much movement in the social sciences towards what has been called a social multilingual turn (Conteh and Meier 2014; May 2014), there is no secure future for bilingual or multilingual education in the world. Gao and Wang (“► [Bilingual Education in the People’s Republic of China](#),” this volume) say it best in relation to China: “the future of bilingual education is without guarantees.”

Just as bilingual education is accepted for the children of the powerful but is contested for others, it is also often restricted just to children who are said to be “typical”. For example, it has been suggested that students with disabilities and students with low literacy are being excluded from dual language bilingual programs in the United States. Bilingual education scholars are mindful of this issue in the implementation of programs and in the ideologies that surround enrichment bilingual education.

The commitment of scholars of bilingual education lies in *promoting human communication* to its fullest and in advancing social equity. The continuous hierarchization of people who speak different languages means that bilingual educators have to be *vigilant to work against the power and hierarchization* of the language practices of dominant groups.

Families and Communities in Bilingual Education

Bilingual education is an important means to *engage different types of families and communities in children’s education*. The inclusion of the community’s language and cultural practices brings the school and the home closer together. Including the language practices of the community means that families can participate in their children’s education, making it possible for them to continue their labor as legitimate educators of their children. The involvement of families and elders in the education of their own children is an object of self-empowerment for minoritized communities. It also corresponds to family and community language planning efforts that are important for some language minoritized communities.

But beyond the inclusion of people, the engagement of families and communities means that understandings and knowledge are expanded beyond those of the groups in power. The inclusion of families and communities in bilingual education is not simply a matter of benefit to the children because of increased home participation; it benefits the production of knowledge because the lenses to understand the world are expanded by incorporating different perspectives and epistemologies embedded in the linguistic and cultural practices of local communities. Because of this, bilingual education has played an important role in ensuring that endangered languages be used to create knowledge and scholarship. In these cases, bilingual education has not been simply an instrument to “save” an endangered language and its speakers, but rather to expand understandings beyond those of powerful western societies.

Material Resources for Bilingual Education: Teachers, Curricula, and Pedagogy

Teachers have an important role in educating. Without educators, schools cannot be transformed. Families of students and communities with distinct language practices may push for bilingual education, but all scholars here included recognize that *educating bilingual and biliterate teachers* and teachers who understand multilingualism is paramount if we are to succeed in bilingual education endeavors.

The role of the teacher may vary in different cultural and educational traditions, but the value of *good teacher education* is recognized by all scholars. Educators who work in bilingual education must adopt a firm stance about the value of children's own language practices in their education. But they must also develop appropriate instructional designs that enact those stances. Stance and instructional design, both in instruction and assessment, are linked (García et al. 2017). Of course, teacher education programs are also linked to the social and economic interests of states, for they are sources of employment and revenue for certain groups. Without recognizing the link between the social, political, and economic factors and the design and implementation of bilingual education programs, attention might be paid to micro factors that will never change the realities of education for marginalized groups and their empowerment.

Likewise, the development of *appropriate curricula and authentic instructional material* are also factors that are tied to economic interests. The production and publishing of educational material, and especially of assessment instruments, is a big profit-making business. It does not make economic sense to publish material in small languages; yet, we know that the existence of educational material is essential if we want teachers to educate using different language practices. Furthermore, because of the plethora of bilingual education programs at the elementary level and their scarcity at higher grades, there is little instructional material for secondary bilingual education. We have noted, again and again, that if bilingual teachers do not have authentic challenging and creative material in both languages, preference is given to the dominant language. And if big publishing companies do not publish material for communities that speak minoritized languages, then bilingual teachers are often burdened with having to develop that material themselves. Often bilingual teachers have to translate instructional material or find adequate texts. This is an unfortunate situation that results in added attention to dominant language practices instead of upholding those of minoritized people. Mwaniki, Arias, and Wiley (“► [Bilingual Education Policy](#),” this volume) summarize it saying that “teachers are seemingly left to their own devices, the implementation and actualization of a semblance to bilingual education rests almost entirely on the ingenuity/circumspection of teachers in implementing official policy.”

This situation is also highly influenced by assessment instruments. Even when bilingual education is available, many political states offer assessment only in the dominant language. This has to do especially with the fact that competition among political states, promoted by practices such as the Program for International Student Assessment (PISA), is only assessed using the dominant language. And the

increasing neoliberal trend in education means that students are only compared according to assessment instruments in the dominant language. Furthermore, teachers and even schools and school districts are assessed according to the performance of their students in these standardized tests given only in the dominant language. Bilingual education has never had so much powerful ideological competition, for it has been increasingly difficult to convince communities, families, educators, and even students of the value of being educated bilingually when their performances are only evaluated monolingually.

Beyond Named Languages

All the authors here included support Jim Cummins early and important contribution to the field of bilingual education – the *interdependence hypothesis* (1979, 1981). There is almost universal agreement among scholars that the language practices of bilinguals are interdependent and that enhancing the child’s home language practices will surely result in more academic competence in a new language.

One of the most important shifts in scholarship in the twenty-first century has been the adoption of a postmodern or poststructuralist lens to examine social or humanistic questions. The modernist link between language and territory may have been broken, but schools, operating as instruments of the political state, continue to hold modernist positions on language and education. We see in this volume the tension between scholars that hold on to more modernist positions that students have a first language (L1) and a second language (L2) and those who see bilingualism as a continuum, as language use in context and situations which make it difficult to determine what is an L1 and an L2.

Interestingly enough, among those who hold that students have an L1 and an L2 are two very different groups – majority communities who wish to teach two or more dominant languages to their children, and minoritized communities who are especially interested in carving a space for their language and cultural practices in schools. Although educators teaching a “foreign” language or teaching bilingually in two or more dominant languages often insist that “the target language” has to be used, there is evidence of the flexibility in the ways in which the languages are used. This has to do with the fact that what is most important is the child’s comprehension of language and content (see, for example, Liebscher and Dailey-O’Cain 2005; Turnbull and Dailey-O’Cain 2009). And although Canadian immersion bilingual programs insisted on full immersion in French for the Anglophones for whom the programs were first developed (See “► [Bilingual Education in Canada](#)” by Dicks and Genesee, this volume), today bilingual instructional strategies are much more common for the diverse population they serve (Cummins 2007). In contrast, language minoritized groups who after years of oppression and struggle are given the opportunity to teach their children in their language, often hold very protective views of how language is to be used in school, insisting on the complete separation between the indigenous language and the dominant language in society. This is the case of many of the Māori programs in New Zealand (See “► [Bilingual Education in](#)

Aotearoa/New Zealand” by Hill, this volume) and in many indigenous communities (See “► [Bilingual Education for Indigenous Peoples in Mexico](#)” by Hamel for Mexico; “► [Indigenous Bilingual Education in Latin America](#)” by López and Sichra for Latin America; “► [Indigenous Bilingual and Revitalization-Immersion Education in Canada and the USA](#)” by McIvor and McCarty for Canada and the USA, this volume). The difficulty, however, lies in identifying the role of the indigenous language in communities where the identification function is paramount, but the proficiency is limited. In their volume on indigenous youth views about language, Wyman et al. (2014) show how young indigenous people struggle with competing ideologies about language. The youth express their love of their language, and yet, unlike their elders, claim a role for all their language resources in order to participate in the history and culture of the community. For indigenous minorities, oppressed and threatened with extinction, schooling is important. But as McCarty et al. (2014) express, indigenous schooling has to be reimagined to capitalize on youth’s fluid sociolinguistic strengths. Instead of identifying language with a traditional place in which it holds a set of stable characteristics, it is important for schools to provide an *embodied space* with youth activity at the center of placemaking (O’Connor and Brown 2014).

Skutnabb-Kangas taught us long ago (1988) that identifying a first or second language depends on the criteria one uses. Is it the first one acquired? The first one learned? The one most used? The one in which the speaker considers herself or himself more proficient? The one with which the speaker identifies? The one with which others identify the speaker? These are all questions that have different answers and that may lead us to abandon a strict categorization of an L1 and an L2. For example, indigenous youth whose heritage language has been forcibly taken away from them cannot be considered L2 speakers, even if they are relearning it in school. Their bilingualism, as García (2009) says is recursive, being reclaimed and repositioned bit by bit. In so doing, the indigenous language is being brought by its young speakers into a dynamic future which cannot just reproduce the past.

The same issue exists when identifying which is the L1 and the L2 of Deaf people. Since most Deaf students have hearing parents, sign language may not be the first language learned, and yet, it is the main language of communication among the Deaf. As the chapters here by Bagga-Gupta and Tang make clear, Deaf youth use their semiotic systems fluidly, as they blend their sign and spoken languages.

The issue of what is an L1 and what is an L2 has become contested in the twenty-first century as multiple norms are made visible. Translanguaging theory (see, for example Blackledge and Creese 2010; Cenoz and Gorter 2015; Creese and Blackledge 2010; García and Li Wei 2014; García and Lin, “► [Translanguaging in Bilingual Education](#),” this volume; Hornberger and Link 2012; Lewis et al. 2012a, b; Li Wei 2011; Otheguy et al. 2015) supports the idea that named languages are social constructions and that bilingual education needs to leverage *all the language practices* of children and not simply those legitimated in schools. Bilingual children have one complex and extended repertoire of linguistic features and not simply two bounded languages – an L1 and an L2 or Arabic, Chinese, English, Spanish, etc. (see Li Wei and García 2017).

As Makalela (“► [Bilingualism in South Africa: Reconnecting with Ubuntu Translanguaging](#),” this volume) states, the oneness ideology of European modernism is inconsistent with many value systems that predate European colonialism, including what constitutes “languages.” The autonomous bounded nature of European languages contrasts sharply with the dynamic bilingualism (García 2009) and translanguaging of multilingual people around the world, especially indigenous communities.

Translanguaging scholars argue that bilinguals have a linguistic repertoire that consists of features that are societally assigned to one language or the other but that from the point of view of bilingual speakers is part of a unified language system that is their own. Translanguaging in bilingual education then upholds the language practices of children in their complexities and not simply the language features of standard academic language as defined by political states and their education system. Scholars who uphold translanguaging in bilingual education support the development of minoritized languages and majority languages. But they do so by starting from the diverse language practices of the children and not simply from a position that they have a bounded L1 to which then an L2 is added.

Theories of translanguaging (García and Li Wei 2014; see also García and Lin, see “► [Translanguaging in Bilingual Education](#),” this volume), while upholding bilingualism, disrupt the idea that there is simply monolingualism and bilingualism/multilingualism. Bilingualism is not simply an addition of two languages (Grosjean 1982; Heller 1999), although it has an additive philosophy, in the sense that it expands (adds to) the language repertoire of the student. Bilingualism is dynamic (García 2009) and new language features functionally interact dynamically with old ones. Students act on their dynamic bilingualism, and teachers and students must then leverage translanguaging in order to go beyond the socioeconomic trappings of many bilingual education programs.

Many authors in this volume take up the notion of translanguaging in describing the language use of multilinguals. This is especially visible in Deaf bilingual education. Bagga-Gupta (“► [Signed Languages in Bilingual Education](#),” this volume) talks about the transmodal and translanguaging features of human communication. In the case of the Deaf, she points to the “linking” and “chaining” between oral languages and signed languages as everyday normal bilingual practices. Jessner (“► [Multicompetence Approaches to Language Proficiency Development in Multilingual Education](#),” this volume) refers to the bilinguals’ coordination of their language resources and their constant decision making as to what strategic moves they should make to achieve specific communicative effects. And speaking about South Africa, Makalela (“► [Bilingualism in South Africa: Reconnecting with Ubuntu Translanguaging](#),” this volume) calls for educators to discard the separatist worldview of colonialism and adopt an *Ubuntu* (*interconnectedness*) translanguaging framework which takes into consideration the sociocultural and linguistic fluidity of African humanism.

García and Lin (“► [Translanguaging in Bilingual Education](#),” this volume) have attempted to bring together the two positions on language by positing a strong and a weak version of translanguaging. The *strong version* posits that bilingual people do not speak languageS but rather use their integrated repertoire of linguistic features

selectively to respond to the communicative needs and achieve their communicative purposes in context. On the other hand, a *weak version* of translanguaging supports national and state language boundaries but calls for softening these boundaries.

Even though in the twentieth century bilingual and multilingual education supported the strict separation of languages, the chapters in this volume also suggest that there is a shift going on that supports what Cummins has called “bilingual instructional strategies” (2007). Some scholars, grounded in an understanding of language as bounded and autonomous system sometimes refer to this use of bilingual instructional strategies by the term code-switching, arguing that this is what bilingual students do and what teachers all over the world do in order to make themselves understood (Lin 2013). Others, however, are increasingly understanding this more fluid use of language from the perspective of translanguaging theory, claiming that although from the outside this might be understood as going from one language to the other, the bilingual child or teacher is simply leveraging their own integrated linguistic system of features that make up their repertoire. The words, sounds, and morphology are not from one language or another. They are simply the bilingual’s words, sounds, and morphology that bilinguals learn to then suppress or activate when they are in different communicative situations.

Bilingual education came into its own around the world in the last part of the twentieth century, especially as minoritized groups claimed their language rights. Although this effort on behalf of people needs to continue, it is also important not to reproduce the nationalist ideologies that have led states to oppress their minorities. As the link between speech community and territory becomes more and more tenuous in the twenty-first century, we must make room for divergent language practices within one space. Bilingual scholars cannot fall prey to the nationalism to which they have been victims. Instead, the challenge for bilingual educators is how to extend the respect and use of their own minoritized community practices to those of others – newcomers to the enterprise. This is especially relevant when minoritized groups have obtained some rights from language majority communities. The Māori are a case in point. Although clearly their language and cultural practices are still endangered in their English-dominant communities, they must make room to also extend their right to indigenous language to those less fortunate, Pasifika people who cannot claim their language practices as treasures of origin or land. The same can be said about Latinos in the USA. Although still stigmatized and discriminated against, bilingual education in Spanish/English has acquired a limited measure of legitimacy in the USA. How to share that privilege with other less fortunate groups is important. And how to recognize the different language practices among Latinos in bilingual education programs – those associated with English, Spanish, Mixteco, and the myriad indigenous languages of the Americas – is an important endeavor. As Grosjean said long ago (1982) bilingualism is not simply two monolingualisms in one. We know that monolinguals who are said to speak the same language never share the exact same linguistic features. There is, of course, more overlap of features with those with whom they are in close communicative contact than with others, often those of the same social class, of the same neighborhoods, and of the same families. Among bilinguals there is even more variability since they not only diverge

in these social communicative characteristics, but also in histories, contact with others, degrees of stigmatization and discrimination, and degrees of power, among other characteristics. Thus, it is most important that bilingual programs pay attention to the different language features that their students hold, a product of histories of colonization, contact, oppression, etc.

Beyond Models and Types

Because of the modernist tradition of bilingual education, the scholarly field has focused on describing boxed models of programs. Wright and Baker (“► [Key Concepts in Bilingual Education](#),” this volume) give us a good list of types of programs – developmental maintenance bilingual education, immersion bilingual education, transitional bilingual education, dual language bilingual education, bilingual and multilingual education in major international languages, bilingual education for Deaf students, bilingual special education, and gifted and talented bilingual education. But as Wright and Baker argue in this volume, a shift must occur between focusing on “effective programs” and focusing on “effective practices.” As García (2009) has said, there is much flexibility in how these programs are implemented, and so perhaps a better way of studying bilingual education is to think of its features, rather than of models (Baetens Beardsmore 2009; Cenoz 2009).

The challenge for schools in the twenty-first century is how to create flexible dynamic models of bilingual education, where students’ language practices are used not simply as a “scaffold” when learning in a second language, but as a *transformative practice that puts power back in the lips of multilingual speakers* instead of simply acquiescing to the power of education and state authorities. To do this, educators must start with the language practices of their students and communities and create bilingual education programs that leverage them and extend them to ensure that children become competent users of language. The goal of education cannot simply be bilingualism in two standard languages, as defined by state and educational authorities. The goal of bilingual education must be the empowerment of bilinguals to use their entire language repertoire in different situations for added criticality and creativity (Li Wei 2011).

Bilingual education program types must then be dynamic, conforming to the existing practices in the community, rather than have the children and communities conform to preestablished notions of what constitutes the two or more languages. Only then will bilingual education programs become instruments of social justice and work to transform the relations of power in which schools (and named languages) exist.

Conclusion

The question of what is appropriate language use in education is a question of power. Who decides what is appropriate? Do states, supra-states, or national groups decide? Or do people decide?

Appropriate language use in bilingual communities consists of being able to use their entire language repertoire without having to actively suppress some of their features. This in itself is a transformative experience that empowers local bilingual people.

Bilingual schools must then create spaces in which students are empowered to freely use *their entire language repertoire* to think deeply, create liberally, and civically engage freely, without always being asked to be less than what they are. Only by being empowered will bilingual children then also learn to suppress specific features of their repertoire in certain spaces. Bilingual education must start with people's language practices, not with languages as having predetermined features which are always those of the powerful, even within minoritized communities. Of course, bilingual education must also show students how to use their language repertoire in ways that are deemed appropriate by powerful language majority communities. But as Pérez-Milans so adequately said "► [Bilingual Education in Hong Kong](#)," this volume, bilingual education has the most chances to succeed when it "*empowers local people*."

In order for bilingual education to act on its potential, we must acknowledge the principles that we have laid out in this chapter:

1. Bilingual education is intrinsically a good thing.
2. Bilingual education is interrelated with social, political, and economic factors, including policies exerted by a global neoliberal economy as well as local states.
3. Bilingual education is entangled in issues of power and advocacy.
4. Bilingual education gives voice to families and communities, especially language minoritized ones.
5. Bilingual education does not have appropriate material resources.

In order to succeed, bilingual education in the twenty-first century must extend its position on named languages and on bilingual education "models." Not everyone in all contexts has to share understandings. But there are two principles that are paramount:

1. *Going beyond named languages.* Bilingual education must start with the language practices of children and not with named languages as defined by states and nations.
2. *Going beyond named models and types.* Bilingual education program designs must respond to the language practices of children and not to preconceived notions of "models" of how language is to be used to which the children must then conform.

The potential of bilingual education lies precisely in empowering the local students who are being educated. In order for it to be good for all, to be free of its relationship with social, political, and economic factors, to empower especially language minoritized families and communities, and to have the adequate resources to educate fully, it needs to free itself up from the demands of nations and states and instead pay attention to the demands of children, their families, and communities.

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Part I

**General Foundations of Bilingual and
Multilingual Education**

Sociopolitical Issues in Bilingual Education

Nelson Flores and Jeff Bale

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Abstract

This chapter provides a broad overview of the study of sociopolitical issues in bilingual education. It begins by examining early concepts in the field and the ways that these early concepts continue to influence the study and practice of bilingual education today. It then examines the ways that more contemporary scholarship has critiqued the positivist and top-down approach of this early work and has instead advocated for a more politicized and bottom-up approach. This critique emerged in two stages. First, there was a critique of English linguistic imperialism and the advocating of linguistic human rights that guaranteed language-minoritized students mother-tongue education alongside access to dominant societal languages. Second, there was a critique of colonial language ideologies and an attempt to reconceptualize bilingual education outside of these ideologies. Though both of these stages have made significant contributions

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to the field, the bulk of this work has lacked an explicit theorization of the neoliberal political economy within which current bilingual education programs exist. This chapter turns to an exploration of the general literature on applied linguistics that connects issues of language to neoliberalism and examines the implications of this literature in exploring sociopolitical issues in bilingual education. This chapter ends with a call for scholars of bilingual education to engage in more interdisciplinary work that considers insights from scholarship on neoliberalism as well as talks back to this work by using studies of bilingual education to clarify and refine current conceptualizations of neoliberalism.

Keywords

Bilingual education • Neoliberalism • Diglossia • Translanguaging

Early Developments

The study of sociopolitical factors in bilingual education was originally undertaken under the broad banner of the sociology of language that emerged in the late 1960s and early 1970s (Fishman 1972). This pioneering work sought to bring together linguistics and sociology to study the role of language in organizing society. A major focus was an attempt to understand the nature of societal bilingualism. Much of this early work continues to shape contemporary research on bilingual education worldwide.

One key concept used to describe societal bilingualism in this early work that continues to shape sociopolitical understandings of bilingual education today was the concept of *diglossia*. Diglossia was used to describe the ways that different languages and language varieties were used in a particular society, with High languages used for prestigious functions and Low languages used for nonprestigious functions. Fishman (1967) described four types of societal diglossia: (1) diglossia with bilingualism, where most of the population is bilingual but the languages are used in different domains, (2) diglossia without bilingualism, where the population consists of two distinct ethnic groups who speak different languages, (3) bilingualism without diglossia, where most of the population is bilingual but the languages do not have separate functions, and (4) neither bilingualism nor diglossia, where most of the population is monolingual and has little interaction with other ethnolinguistic communities. Fishman (1967) argued that diglossia led to linguistic stability because since each language variety was used for a different purpose the maintenance of both languages was assured. This has been taken up by many in bilingual education to argue for diglossic arrangements in bilingual education programs where each language has separate domains to ensure that the Low language is fully developed by students (García 2009).

Another key concept in this early work was the language policy orientation of societies toward issues of bilingualism. Kloss (1977) argued that language policy can have a restriction orientation, a tolerance orientation, or a promotion orientation. A *restriction orientation* is characterized by legal prohibitions against languages other than the national language. A *tolerance orientation* is more hands-off, with governments not interfering with the use of languages other than the national

language in the private domain but making no explicit effort to support bilingualism in the public domain. Finally, a *promotion orientation* entails public authorities trying to promote multilingualism by allowing for multiple languages to be used in public institutions. Scholars have since expanded on this typology to include an *expediency orientation* that allows for the use of languages other than the national language as a short-term accommodation and a *repression orientation* that entails active efforts to eradicate a language (Wiley 2002). Bilingual education advocates continue to use this typology to argue for promotion-oriented approaches to language policy that would involve governmental support for the development of bilingual education programs that seek to develop bilingualism and biliteracy for all students (May 2014).

Related to Kloss' framework is a typology developed by Ruiz (1984) that seeks to analyze different orientations to bilingual education programs. He identified three possible orientations: (1) *language as problem*, which positions bilingualism as a challenge that needs to be overcome, (2) *language as right*, which argues that there is a fundamental right to speak the language of one's ethnic group, and (3) *language as resource*, which argues that bilingualism is an asset in an increasingly globalized world. The language as problem orientation supports *subtractive bilingualism* where students are expected to replace the minoritized language with the dominant societal language. In contrast, both the language as right and language as resource orientation support *additive bilingualism* where students are supported in the development of both languages. While advocating similar goals, Ruiz favored the language as resource orientation since it avoided subtractive bilingualism while also avoiding the political conflicts he associated with the language as right orientation. As with promotion orientation, the language-as-resource orientation continues to inform calls for bilingual education around the world today (Lo Bianco 2014).

Though all of these concepts have had, and continue to have, tremendous impact on the study of the sociopolitical factors in bilingual education, they framed the study of language as objective and positioned language education scholars as disinterested and neutral experts on the topic – as scholars simply trying to understand the role of language in society in the hopes of making objective recommendations based on their research findings (Ricento 2000). As a result, this early work for the most part emphasized top-down processes developed by governmental entities and overlooked the grassroots political struggles that were demanding governmental recognition of minoritized languages that emerged as part of decolonization and civil rights struggles worldwide. It also treated language as the sole object of inquiry and avoided explorations of larger political and economic factors that shaped societal understandings of bilingualism (Tollefson 1991).

Major Contributions

Early studies of sociopolitical issues in bilingual education were critiqued by more overtly politicized research that emerged during the 1980s and 1990s. This more critical approach was prompted by a growing distaste for top-down state planning as

well as the undermining of decolonization projects with the rise of globalization (Ferguson 2006). Ricento (2000) characterizes this second phase of work “as one in which there was a growing awareness of the negative effects – and inherent limitations – of planning theory and models, and a realization that sociolinguistic constructs. . . were conceptually complex and ideologically laden” (p. 16). In short, the study of the role of language in society was no longer seen by many scholars as an objectively scientific enterprise but rather as an ideologically driven process that was being used to benefit elites at the expense of the masses (Tollefson 1991).

One attempt to offer a more critical analysis of the sociopolitical realities of bilingual education has been the critiques of English linguistic imperialism and the positioning of calls for bilingual education within the framework of linguistic human rights. Phillipson (1992) defines English *linguistic imperialism* as when “the dominance of English is asserted and maintained by the establishment and continuous reconstitution of structural and cultural inequalities between English and other languages” (p. 47). This linguistic imperialism is said to be the product of *linguicism* that Skutnabb-Kangas (1988) defined as “ideologies, structures and practices which are used to legitimate, effectuate and reproduce an unequal division of power and resources (material and immaterial) between groups which are defined on the basis of language” (p. 13). In short, just as racism oftentimes leads to cultural imperialism, linguicism leads to linguistic imperialism and an imposed monolingualism in education.

Some scholars have used the critique of linguistic imperialism as the foundations for making a case for *linguistic human rights* with a particular emphasis on the role of schools in enforcing these human rights. As Skutnabb-Kangas (2000) argues “it should be the duty of the educational system to enable minority children to become (minimally) bilingual, since bilingualism is a necessity for them, and not necessarily or not usually a matter of personal or free choice” (p. 501). She argues that the only way to ensure that this occurs is to pass legislation at both the national and international level that guarantees language-minoritized communities the right to bilingual education that includes education in their mother tongue along with the opportunities for access to dominant languages. In her view, anything less than this is tantamount to linguistic genocide.

Yet, some have called into question what constitutes mother-tongue education and whether providing language-minoritized communities access to mother-tongue education is inherently empowering to these communities. For example, Pennycook (2002) uses Michel Foucault’s notion of *governmentality* as a framework for understanding the ways that mother-tongue education informed by colonial language ideologies may not be inherently empowering. He uses the examples of Hong Kong and Malaya to illustrate this point, noting two different discursive regimes complicit in these two colonial projects: (1) the Anglicists who believed that colonial subjects should be instructed solely in English in order to teach them the superiority of British culture and (2) the Orientalists who believed that colonial subjects should be instructed in their vernacular (codified by Europeans and not reflective of the actual language practices of colonial subjects) in order to more effectively teach them the superiority of British culture. The point Pennycook makes is that both discourses were complicit in colonial governmentality – an attempt at the production of docile colonial subjects.

Brutt-Griffler (2002) makes a similar point in her study of British colonial language policy in Lesotho and Sri Lanka arguing that mother-tongue education was used as a tool of providing industrial education to colonized populations that prepared them to be manual laborers in factories and in agriculture. Both scholars use their findings to problematize the idea that mother-tongue education is inherently empowering and argue that when associated with particular discursive regimes, mother-tongue education can serve as a tool of social reproduction.

This exploration of the complicities of mother-tongue education in colonial relations of power has been extended by other scholars into our contemporary sociopolitical context. One example that represents the fruit of the labor of the linguistic human rights framework and the activism of ethnolinguistic minorities is the 1994 South African Constitution, which initially recognized eleven separate languages as official (now 12, with the subsequent addition of South African sign language) and which protects the rights of individuals to “use the language of their choice” and “to receive an education in any of the official languages or language of their choice where that is practicable” (quoted in Makoni 2003). While the South African Constitution provides institutional support for bilingual education as a human right, Makoni (2003) critiques it (and the entire project of linguistic human rights) as “founded on the ‘boxed’ notions of language and ethnicity ultimately traceable to eighteenth-century German Romanticist ideas which treated territory, constructions of race, and conceptualizations of language as identical and indivisible.” (p. 140). In other words, the South African Constitution accepts colonial language ideologies and in this way may be complicit in the continued marginalization of the language-minoritized populations that it purports to protect.

Critical applied linguists have used this critique of colonial language ideologies to develop new frameworks for conceptualizing bilingual education. For example, García (2009) argues that dominant approaches to bilingual education conceptualize bilingualism using *monoglossic language ideologies* that treats monolingualism as the norm and conceptualizes bilingualism as double monolingualism. García connects diglossia, a key concept from early developments in the field to these monoglossic language ideologies in that it advocates for a strict separation of languages with the High language used in certain contexts and the Low language used in other contexts. Yet, as she argues, the realities of language use among language-minoritized communities are, in fact, much more complex, with no clear linguistic boundaries. Therefore, the strict separation of languages in many bilingual education programs is complicit in the marginalization of these language practices. To replace this type of thinking García argues for using *heteroglossic language ideologies*, where languages are not seen as separable and countable but rather as interacting in complex ways in the minds and practices of multilingual people. This perspective advocates an approach to bilingual education where fluid linguistic processes would be allowed to coexist through what García calls *translanguaging*.

The practice of translanguaging is embedded in a theory of *dynamic bilingualism* that “draw[s] from the different contexts in which [translanguaging] develops and functions” (García 2009, p. 53). This conceptualization functions to situate bilingualism socially and focuses on the fluidity of language use across time and space as

opposed to the idealized language practices of colonial language ideologies. In connecting these language practices with broader issues of education that may continue to take a monoglossic view, Hornberger and Link (2012) have explored how dynamic bilingualism and translanguaging relate to classroom practices and restrictive educational policies using the *continua of biliteracy* lens. They explain “the continua of biliteracy lens allows and encourages educators to contest or temper top-down policy mandates by paying more attention to fluid, multilingual, oral, contextualized practices at the local level, because they are essential for learners’ development” (p. 276). In other words, this dynamic bilingual perspective rejects top-down approaches to bilingual education and advocates a bottom-up approach to bilingual education – that is, an approach that builds on the actual language practices of language-minoritized students as opposed to one that seeks to impose idealized language practices.

Some scholars have expanded on this idea of a bottom-up approach to bilingual education to call into question the very idea of bilingualism, arguing that the term itself presupposed the same romanticist notion of boxed languages and ethnicities that was developed as part of governmentality. Flores (2013a) advocates a move away from a discussion of dynamic bilingual education to dynamically lingual education that rejects static and idealized notions of language and provides student space to experiment with their fluid language practices by supporting them in developing fluid texts that transcend conventional genres and linguistic boundaries. Though supportive of bilingual education efforts, this work challenges advocates of bilingual education to critically examine the dominant language ideologies that they perhaps inadvertently reproduce in the hopes of reconceptualizing bilingual education in ways that facilitate the affirmation of language practices that do not conform to colonial frameworks.

Though all of these developments in the study of sociopolitical issues in bilingual education have developed a more critical perspective that examines both the transformative potential of bilingual education and its oppressive possibilities, there continues to be a lack of theorization of the political and economic processes of *neoliberalism* as a mechanism that shapes bilingual education. We now turn to works in progress that examine the impact of neoliberalism on shaping the relationship between language and society. Though some of this work is not specific to bilingual education per se, we think that it has potential in moving the study of sociopolitical issues in bilingual education forward in ways that take to heart the critique of colonial language ideologies offered by work described above, while also being sensitive to the impact of neoliberalism on bilingual education.

Works in Progress

In many ways, the recent developments in sociopolitical analysis of bilingual education we address here share two roots. On the one hand, they extend the broader “social turn” (Block 2003) in applied linguistics that began over two decades ago, premised on acknowledging the limitations of understanding language use and

acquisition as a largely cognitive and/or individual process. On the other, dramatic upheavals around the world have imposed themselves on the academy and challenged many of its fundamental assumptions about language in society. The global economic meltdown in 2007–2008 has underscored the extent to which applied linguistics has lacked the analytical tools necessary to fully conceptualize language phenomena in sociopolitical terms. Here, we focus on a growing body of applied linguistic scholarship that has begun to integrate an explicit political-economic framework into its analysis.

Block et al. (2012) argue that notions of political economy and social class constitute a fundamental “blind spot” (p. 1) in applied linguistic analysis. Current efforts to redress this gap thus far have largely focused on the connections between globalization and Global English. Holborow (1999), for example, draws on the classical Marxist tradition of theorizing language and society to challenge the predominance of poststructuralist assumptions in guiding the “social turn” in applied linguistics. Specifically, her concern is that “the replacement of ideology by discourse represents an epistemological shift which signals the displacement of the real in favour of the representational” (Block et al. 2012, p. 24). Moreover, she relies on Marxist notions of class to assess Phillipson’s notion of linguistic imperialism. While Holborow (1999) recognizes that Phillipson’s analysis was long overdue within applied linguistics and made well-intended calls to challenge the dominance of English internationally, she insists that English is not a static language in postcolonial contexts. The historical contradictions of English mean that it is ideologically contested and plays different roles for different people in a given society. “Like railways,” she notes, “language can be used for many purposes, and not always those laid down by its British engineers” (Holborow 1999, p. 92). Specifically, Holborow stresses the existence of class and other social divisions *within* both core English and postcolonial nation-states to underscore the contradictions of Global English (see pp. 73–80). For one, it is precisely local rulers in “periphery” nations who oversee and benefit from economic development and integration within the global capitalist system. For the other, she notes that “not all speakers in the West dominate, nor are all speakers in the periphery discriminated against. The notion of class cuts across London as much as it does Lagos or Lahore” (p. 78).

Perhaps the most developed political-economic framework to emerge from applied linguistics is that of Monica Heller, based on several major ethnographic studies in Francophone Canada. This framework enumerates intersecting political-economic processes that describe what she calls the “neoliberal globalizing new economy” (Heller 2011, p. 12). From her perspective, saturated domestic markets and capital’s subsequent need to expand internationally has fundamentally disrupted the modernist link between language and territory. Simultaneously, structural shifts towards a knowledge-based or information economy, especially in the core capitalist states, mean that the importance of language in society is increasingly defined in terms of its economic legitimacy. In this way, language serves as a specific economic resource, either as a specific skill to be employed and/or exploited in service industries, such as call centers, or as a way to add symbolic value to aid in marketing products, tourist destinations, etc. As Heller notes, “in the globalized new economy, communication is

central to the functioning of the market; language, culture, and identity are tied to the emergence of niche markets and added value, in a process of localization that globalization has made possible, indeed necessary” (Heller 2011, p. 20).

While Heller has developed this comprehensive political economic framework to describe what she views as fundamental changes in the role that language plays in legitimizing social power, other scholars have identified similar themes to develop critiques of the language-as-resource orientation that her framework implies and that continues to inform much bilingual education scholarship and praxis. For example, Petrovic (2005) describes the extent to which the language-as-resource orientation to bilingual education advocacy dovetails with the logic and language of neoliberalism. As he argues, bilingual education advocacy that adopts the resource orientation ultimately bolsters the very market forces that render language-minoritized communities so socially, economically, and linguistically vulnerable in the first place. He echoes concerns first raised by Valdés (1997) about the newfound popularity of dual-language immersion programs: because the growth in such programs has largely been framed by market forces, discussions of social power imbalances between the communities involved in those programs and the rights of language-minoritized communities have been marginalized.

As welcome as these new explorations of political economy are in bilingual education and applied linguistics more broadly, there remain (at least) three key questions to address: (1) To what extent is language a proxy for other social and material conflicts, and to what extent does it animate political-economic developments? (2) To what extent is the state still relevant, meaning just how “postnational” has global capitalism become? And (3) how much of a break from past political-economic constellations is the current “globalized” or neoliberal one and what are the implications of these (dis-)continuities for bilingual education?

Problems and Difficulties

As bilingual education scholars begin to address these questions in greater detail, we see two specific problems that need to be overcome. The first is the extent to which disciplinary divisions remain a key structural feature of academic life. As Block (2003) noted, the process of broadening applied linguistic study has been underway for some time, but the challenge still remains not only to read broadly enough so as to integrate theoretical insights and conceptual frameworks outside applied linguistic traditions but also so as to understand the debates about and nuances of those frameworks as other fields have developed them. Works such as Fishman’s (1973) essays on language and nationalism or May’s (2012) volume on language rights stand out as exceptional, if for no other reason than that they reflect exhaustive interdisciplinary study and synthesis. However, if sociopolitical study of bilingual education is to integrate notions of political economy and social class into its analysis, then the challenge for us is to read widely enough to understand the renewed debates within critical study of political economy and international

relations around fundamental questions of the relationship between economic and social processes, definitions of the state, and historicizing the development of global capitalism.

A second challenge to addressing the questions identified in the previous section is what we might call a gap between the theory and practice of bilingual education. At issue here is the gap between calls for adopting heteroglossic language ideologies among critical applied linguists and the realities of the monoglossic language ideologies that continue to inform the schooling of much of the world's population. Lin (2013) offers the case of Hong Kong as one example of this disconnect. While academics are arguing for an end of strict separation of languages, teachers in Hong Kong are under more pressure than ever to keep English and Chinese strictly separated from one another. Yet, she also notes that many ways that teachers are using heteroglossic language ideologies to inform their teaching despite these mandates indicating the need to move away from conceptualizing language policy as a top-down process in the hopes of "building plurilingual pedagogies from the ground up" (p. 538). An important question that remains to be considered is the role of critical applied linguistics in supporting this bottom-up approach.

This question is especially relevant when we consider the historical record, which suggests that the most significant expansions in access to bilingual education have resulted from civil rights movements that have explicitly challenged racism and called for bilingual and bicultural educational programs. For example, Bale (2011) identifies the existence of an inverse relationship between the status of US imperialism and access to bilingual education. Historical moments in which US imperialism has been ascendant correlate to constricting social space for bilingual education and the practice of non-English languages more broadly. Conversely, the presence of mass civil rights movements challenging racism and US imperial power have forced open the social space required to access bilingual education and non-English languages in society more broadly. This clear historical record does not mean that theories of bilingual education or bilingualism are irrelevant; in fact, the rich historiography of the Chicano struggle in Texas has documented the extent to which applied linguists and teacher allies worked with students and community members demanding bilingual and bicultural programs at school to ensure that new programs and curricular offerings reflected research-based best practices (Trujillo 1998). Moreover, it is also the case that limited gains in bilingual programming in schools have been won absent broad social struggle. Still, the historical record is irrefutable that the broadest gains and the deepest shifts away from monolingual ideologies have been the result of mass antiracist and anti-imperialist struggles. As critical applied linguists further develop notions of translanguaging, dynamic bilingualism, and other cutting-edge theoretical work, we maintain that this work will be most effective in practice if it remains rooted in this central historical insight.

Indeed, rescuing this historical insight and using it to ground further theoretical developments in sociopolitical approaches to bilingual education is in some ways more important than ever, given the extent to which neoliberalism broadly and the "new right" movement specifically have appropriated the language of civil rights and

social justice in framing multilingualism. There are two contradictions at play here. First, there is a fundamental incongruity between neoliberal calls for multilingualism in social justice terms and the material interests in human capital development and profit accumulation that stand behind those claims (Flores 2013b; Kubota 2014). Second, neoliberal calls for multilingualism continue to be framed by enduring monolingual and standard-language ideologies, in effect legitimating, if not sharpening, extant social divisions between elite and stigmatized populations (Kubota 2014).

Future Directions

We find much promise in current efforts to integrate explicit frameworks of political economy into the sociopolitical study of bilingual education. By necessity, then, this means conducting interdisciplinary work, as well as work that historicizes the enduring sociopolitical issues surrounding bilingual education. Specifically, there is a need to continue to historicize the rise of monoglossic language ideologies and their impact on language-minoritized populations worldwide. The goal of this work should be to theorize alternative approaches to bilingual education. Yet, there also needs to be an examination of the fact that one of the most deep-rooted bastions of monoglossic language ideologies can be found in academic knowledge production areas such as academic publishing. This has led to the ironic imposition of monoglossic language ideologies on academic publications such as this chapter that call these ideologies into question. If we as a field are truly going to take the critique of monoglossic language ideologies to heart then we will need to transform the monoglossic expectations for academic publishing.

Importantly, all of this work must be explicitly situated within critical analysis of the neoliberal political economy. For this to be possible, it is important for future work to clarify what precisely is meant by terms such as neoliberalism. For example, neoliberalism is often used interchangeably with *globalization*. Heller's political-economic framework discussed above suggests that this conflation is inaccurate insofar as she views economic globalization as a feature of neoliberal late capitalism, not as synonymous with it. In addition, the concept of neoliberalism itself is not always clearly defined or consistently employed in analysis. Is neoliberalism above all an ideological phenomenon of shifting our understanding of citizen to client or our conception of education as a public good to a private one? Does neoliberalism describe a specific political and economic set of strategies by which ruling classes have restructured their respective societies so as to restore their control over it (in the face of the upheavals of the 1960s and 1970s) and corporate profitability? Or is neoliberalism best thought of primarily as an historical phase of global capitalism, to distinguish our current era from the postwar era, for example? Our definitions need not settle on just one of these options to the exclusion of all others, of course. But too often, the terms slip from one category to the other, when it appears in applied linguistic study of bilingual education at all. As Ricento (2012) has argued, the under- or nonspecification of such terms not only undermines our theoretical precision but can lead to greater debates among scholars where there might in fact be more consensus and agreement.

Developing a robust definition of neoliberalism is especially relevant for studying sociopolitical issues in bilingual education because as with critiques of monoglossic language ideologies that are currently influencing the field, it also emerged as a critique of nation-state ideologies. Indeed, there is emerging evidence that heteroglossic language ideologies that fail to offer an explicit critique of neoliberalism may be complicit in the production of neoliberal subjects (Flores 2013b). It is imperative that the study of sociopolitical issues in bilingual education begin to grapple with this possibility so as to avoid normalizing neoliberal relations of power in ways that continue to marginalize language-minoritized communities.

Cross-References

► [Bilingual Education Policy](#)

Related Articles in the Encyclopedia of Language and Education

Alastair Pennycook: [Critical Applied Linguistics and Education](#). In Volume: Language Policy and Political Issues in Education

James Collins: [Language, Class, and Education](#). In Volume: Language Policy and Political Issues in Education

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Bilingual Education Policy

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Abstract

The chapter is a critical appraisal of bilingual education policy scholarship and practice against a backdrop of contestations that characterize determination and execution of bilingual education goals and the spread of the idea of linguistic human rights in education – and discourses attendant and consequent to these processes. A dominant and recurrent motif in bilingual education policy discourses is the assumed analogous relationship between language and the nation-state and the sometimes integrative, sometimes disruptive role of education in this relationship. Resultant bilingual education types have, in practice, manifested themselves in a range of programs. Invariably, these programs fall

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within a dyad of language policy orientations, these being promotion/tolerance and repressive/restrictive. These orientations influence types of educational programs and their outcomes. Nowhere are these dynamics more pronounced than in postcolonial contexts – which, from the critical perspective adopted in the chapter, include, apart from the “usual” contexts in the global south, western democracies with a colonial past. In these contexts, presumed “mother tongue,” local language, or minority language becomes both important and problematic in the conceptualization and implementation of bilingual education policies. In other instances, even when language-in-education policies are allegedly intended to increase opportunities for educational access and equity, in practice, they (re) produce, perpetuate, and entrench unintended outcomes largely inimical to the progressive goals of bilingual education policies. However, when effectively implemented, bilingual education policies remain potent tools for social, political, and economic inclusion of marginalized groups in postcolonial contexts, irrespective of whether these are in the global north or global south.

Keywords

Bi/Multilingual Education • Bilingual Education Policy • Language Policy Orientations • Postcolonial contexts • Right to education access

Introduction

In this discussion, “bilingual educational policies” include any attempt to strategically employ two or more languages in instruction for either the purpose of linguistic accommodation for students who do not speak the language of instruction or to promote the learning of more than one language to achieve individual, community-based, societal, or political goals (Baker 2011). The question of who determines these goals and the extent to which those affected by them have a voice or agency in the determination of formal policy-making varies greatly around the globe (Tollefson 2013). Moreover, although linguistic human rights have been recognized by the United Nations and some nation-states (Spring 2000), there are still many places where linguistic human rights in education are not recognized or implemented well, even if rights are recognized (Arias and Wiley forthcoming). Nevertheless, there is still much that individuals and communities can do in promoting language learning beyond policies that are officially sanctioned or imposed.

The first section of this chapter provides a brief historical background for the contemporary context of bi/multilingual education. The second section, addresses the utility and efficacy of various models of bi/multilingual education as they have been shaped and classified based on various social, political, or individual educational goals related to language, literacy, and educational aspirations. The third section, addresses bi/multilingual education in postcolonial, highly multilingual contexts in which notions of a student’s presumed “mother tongue” or local language become both important and problematic in the conceptualization and implementation of educational policies, even when they are allegedly intended to increase

opportunities for educational access and equity. This section also problematizes the role that dominant languages, such as English, play in relation to opportunities to promote other languages of instruction for educational advancement through primary, secondary, and tertiary levels. The concluding section provides a brief assessment of the current state of bi/multilingual education with recommendations for improving its prospects in the future.

The Contemporary Contexts of Bilingual Educational Policy and the Weight of History

Within the contemporary context of bilingual educational policy, it is difficult to explain the various programmatic models and goals for students without reference to the history of the rise of the nation-state and ethnolinguistic nationalism that has dominated both the modern and postmodern periods. In particular, it is necessary to consider the ongoing implications of the nation-state for setting educational policies, including contemporary bi/multilingual educational policies. With the rise of modern nation-states came the notion of “native-speaker” and the “imagined” unity between linguistically homogenous speakers and territorially bound languages (Anderson 1991; Bonfiglio 2010). Historically, the presumed unity of territory, language, and dominant ethnic groups – and sometimes race (Hutton 1998) – have been state-prescribed ingredients for national unity. The efforts to promote the linguistic unification of modern France have been identified as a critical starting point for the increased emphasis on national languages; however, antecedents can be noted earlier in the late fifteenth century in the counsel of the Castilian court scholar, Antonio de Nebrija (1441–1522), to Queen Isabella of Spain as he implored that language can be a strategic instrument for both domestic social control as well as the extension of empire.

This modern emphasis on national and imperial languages represented a break with prior emphases in the educational uses of languages. Tollefson (2013) has noted, prior to the rise of modern nation-states, education was generally conducted in local languages. State-sponsored mass education, itself, however, generally followed the rise of the nation-state. Classical languages were typically used for the education of elites, e.g., Arabic, Chinese, Latin, Persian, among others (Ostler 2006), or as lingua francas in trade and governance (Ostler 2011). During the colonial expansion of early modern empires, traders and missionaries often learned and used local languages, while exploited laborers and overlords relied on contact languages such as pidgins. These arose out of necessity for communication in multilingual contexts where the participants had unequal status and power. As European imperialism became dominant in large parts of Africa, Asia, and the Americas, colonial and imperial languages were imposed, often to the detriment of indigenous or previously prestigious languages (Gray and Fiering 2000; Heath 1976; Kaiwar et al. 2009; Mignolo 2000). Initially, educational access to imperial languages was often limited to the education of local elites and functionaries, but in later stages of empire, they were often prescribed more broadly as educational opportunities were extended to

larger segments of the population (Willensky 2000). Because of their potential for not only inclusion but also for mass indoctrination and assimilation, dominant languages, as well as the uncritical promotion of so-called mother tongues, require close scrutiny (Ricento and Wiley 2002; Wiley 2012).

In countries with significant indigenous populations, including the United States for example, assimilation into the dominant language has been strategically achieved through a process of deculturation where the use of indigenous languages was suppressed (Spring 2012). Only gradually have the linguistic human rights of indigenous peoples been recognized by the United Nations (UN) through various declarations (Spring 2000). More rarely are these rights recognized and acted on by the UN's member states (Arias and Wiley forthcoming). Although the use of "mother tongue" education for initial or primary literacy instruction has become endorsed and used in bilingual education programs, often, the ultimate goal of these "transitional" programs is to promote instruction in dominant or national languages. The use of mother tongue education is only an accommodation. Thus, even though bilingual education is available in many countries, it remains controversial largely for political reasons, particularly for minoritized, politically subordinated populations. Often the educational goals for such programs have involved varying degrees of voluntary, or even coercive, assimilation (Spring 2008).

When considering the types and range of programs that are available under various "bilingual" labels, one approach has been to try and group or classify programs based on the relationship of learners to the nation-states in which they reside. Cummins (1997), for example, identified five basic program types of what falls broadly under the label of bilingual education. These included those programs "that involved the use of an indigenous Native Language as a medium of instruction" (p. xii). Programs such as these may be found in the United States and Canada. Programs that involve the use of a "national minority" language such as "Gaelic in Ireland and Scotland and Welsh in Wales as well as Basque and Catalanian in Spain" are a second type; however, these languages may also be considered indigenous (Cummins 1997, p. xiii). Cummins (1997) identifies a third type of program that is designed for immigrants. In this category, languages such as Spanish in the United States come to mind. We should note, however, that Spanish is both an old colonial language in the United States as well as a language that was widely spoken in areas later incorporated, namely, those previously belonging to the Spanish Empire, and subsequently Mexico, prior to the Mexican–American War (1845–1848). In fact, two-thirds of what would eventually become the United States was at one time part governed under a Spanish language polity (Macías 2014, p. 14). In many postcolonial contexts, former colonial languages are now widely used as mediums of instruction and official languages. Cummins (1997) identified programs for the deaf and hard-of-hearing as a fourth type of program. He also notes a fifth type of program, which focuses on promoting bilingual education for those of the majority/dominant linguistic group, examples include French immersion programs in Canada.

Cummins (1997) also notes some interchangeability in the application of the labels. Thus, labeling is somewhat arbitrary and individual label types are not

necessarily mutually exclusive. He notes that “it is not meant to do justice to the enormous diversity of program type implemented in a myriad of different sociopolitical and sociolinguistic conditions” (p. xv). Acknowledging this problem, we note that a significantly missing category would include programs that use former colonial languages in postcolonial contexts. It is particularly important to understand the relationship of these languages to students’ purported mother-tongue(s) as well as other important national or regional languages and their uses in the curriculum. Moreover, given the spread of English within global contexts, its dominance has important implications for educational equity, access (Tollefson 2013) as the emphasis on English affects opportunities for the study of other languages and bilingual and multilingual education more broadly (Spring 2008; Wiley and Artiles 2007).

Language Policy Orientations

Every child should have what Wiley (2007) explains as the “right to access” an education, which would “[allow] for social, economic, and political participation” (p. 89). He discusses language policy orientations within an expanded framework originated from Kloss (1977). Language policies have, throughout time, ranged from tolerance or promotion-oriented approaches to those of today. Many state policies – under the guise of being promotion-oriented – are now restrictive in nature. For example, in political campaigns in California, in 1998, and Arizona, in 2000, efforts to restrict bilingual education were touted under the guise of “English for the Children” (Arias and Faltis 2012).

Wiley (2013) identified several language policy orientations which influence the selection of languages in schools. By viewing language policies in terms of the desired outcome – promotion, tolerance, restriction, or repression – we can anticipate the type of support there will be for student bilingualism and teacher preparation for language minority students. Restrictive- and repressive-oriented language policies both perceive minority languages as a problem. They differ by degree. Repressive language policy orientations were exemplified in the Bureau of Indian Affairs (BIA) schools in the United States which sanctioned the use of indigenous languages and fostered linguistic assimilation (Wiley 2007). Restrictive language policies do not seek to eliminate the language, but they set sanctions on the use of minority language. Tolerant language policies are neutral with regard to minority language use, neither restricting nor supporting it. Promotion-oriented language policies, in theory, view language as a resource and provide financial and legislative support for development of either minority or dominant languages. In practice, however, it is often only the dominant language that is promoted. Minority languages are more likely to be used for “expediency” as in transitional bilingual programs that use a minority language as a temporary means of moving students to the dominant language.

In the United States, for example, there is variation among language policy orientations. Some promotion-oriented policy states would describe themselves as “English Plus,” stressing the importance of proficiency in more than one language:

New Mexico, Oregon, and Rhode Island (Menken 2008). Several states, including Illinois and Texas, (see Crawford 2004) promote the expediency model, allowing short-term transitional and developmental bilingual education, and dual language and English as a second language programs for those students who are classified as English language learners (ELLs). Other states such as Nebraska demonstrate a tolerance model, not mandating or sanctioning bilingual programs. Finally, there are the English-Only states – Arizona, California, and Massachusetts – which display a restrictive language policy orientation, prohibiting and proscribing the use of L1 in classrooms. These restrictive language oriented state policies have emerged in the last two decades in the United States as the English-Only Movement (Wiley and Wright 2004) made its way through ballot measures to the classroom (Wright and Choi 2006). While all three states mandate English as the official language of instruction, Arizona is the most restrictive, sanctioning the use of students' native language in classrooms and prescribing a teacher preparation endorsement that promotes a restrictive language policy.

Language policy orientations influence the type of educational programs designed for language minority students. As Table 1 below indicates, programs which promote assimilation for language minority students impose the majority language or recognize the minority language for a very limited period of time. This is the case with transitional bilingual education (TBE), where the goal is not bilingualism but monolingualism.

Reference Baker 1996, Tables 1, and 2

Conversely, where the goal is pluralism and enrichment, we see a promotion language orientation which supports bilingualism and biliteracy.

Table 1 Weak educational program options for language minorities

Type of program	Typical child in program	Language of the classroom	Societal and educational aim	Language and/or literacy aim
<i>Submersion</i> (a.k.a structured english immersion)	Language minority	Imposes majority language	Assimilation	Monolingualism in English
<i>Submersion</i> (with withdrawal ESL)	Language minority	Imposes majority language	Assimilation	Monolingualism in English
<i>Segregationist</i>	Language minority	Minority language (forced, no choice)	Apartheid	Monolingualism
<i>Transitional</i>	Language minority	Moves from minority to majority language	Assimilation	Relative monolingualism in English
<i>Majority language plus foreign language</i>	Language majority	Majority language with L2/FL lessons	Limited enrichment	Limited bilingualism
<i>Separatist</i>	Language minority	Minority language (out of choice)	Detachment/autonomy	Limited bilingualism

This table is adapted from Baker (1996, p.172)

L2 second language, L1 first language, FL foreign language

See pp. 172–197 for elaboration

Table 2 Strong educational program options for *both* language minorities and majority children

Type of program	Typical child	Language of the classroom	Societal and educational aim	Language and/or literacy aim
<i>Immersion</i>	Language majority	Bilingual with initial emphasis on L2	Pluralism and enrichment	Bilingualism and biliteracy
<i>Maintenance / heritage language</i>	Language minority	Bilingual with emphasis on L1	Maintenance / pluralism and enrichment	Bilingualism and biliteracy
<i>Two-way/dual language</i>	Mixed language minority and majority	Minority and majority languages	Maintenance/ pluralism and enrichment	Bilingualism and biliteracy
<i>Mainstream bilingual</i>	Language majority	Two majority languages	Maintenance/ pluralism and enrichment	Bilingualism and biliteracy

This table is adapted from Baker (1996, p.172)
 L2 second language, L1 first language, FL foreign language
 See pp. 172–197 for elaboration

Recent research by Collier and Thomas (2012) in the United States shows that two-way dual language education has had a clear positive impact on native English speakers and English learners. They maintain that when ELLs get bogged down in ESL (English as a Second Language) or mainstream English classes, where the curriculum is only instructed in English, only half of the achievement gap closes and they tend to fall further behind in school. Two-way dual language education, when implemented properly, prevents this from happening; Collier and Thomas (2012) argue that two-way dual language education is the only model that allows English learners to fully close the achievement gap and even outperform their native English-speaking classmates on standardized tests. Two-way dual language instruction allows students, whether they are heritage speakers of a minority language or native English speakers, to learn English and their native language through all content areas in the implemented curriculum. This method encourages students to increase their vocabulary across various areas of study and to develop a deeper academic proficiency than they could with traditional foreign language instruction, which focuses more on studying the language instead of actively using it.

Bi/Multilingual Education in Postcolonial Contexts

Almost half a century after the transition to political independence in much of the former colonial world, the concept of linguistic imperialism (Phillipson 1992, 1996) and associated constructs such as “elite closure” (Scotton 1990; Kamwangamalu 2001) as adequate frameworks in explaining the language situation in this geopolitical area has been found to be increasingly wanting and elitist fundamentally because these frameworks largely ignore local dynamics and agency. The neat taxonomy of

bilingualism and bilingual education proposed and expounded on by Baker (2011) and García (2009) do not necessarily capture what actually happens in some instances at the coalface of bi/multilingual education policy implementation in postcolonial contexts. In fact, García (2009, p. 117) echoes this view by observing that “the very neat frameworks and types of bilingual education that were developed in the second half of the twentieth century started to *leak*, as the concept of diglossia itself was questioned, and as features of one type were combined with features of another to better fit the situation at hand, and especially to adapt to the complex bilingualism of students.” This deduction reflects advances in bilingualism and bilingual education research and scholarship in which “during the last decades of the twentieth century, western scholarship has slowly become aware of the vast linguistic complexity of the East, of Africa, [and] of the developing world” (García 2009, p. 116). As Banda (2009, p. 1) eloquently argues, “one of the main drawbacks of current policy [in postcolonial contexts] is that it is still based on Western and colonial notions of multilingualism, which basically involves multiple monolingualisms.” The net result of this policy approach over successive development management cycles in postcolonial contexts is that “languages which have existed side by side for significant periods of time, complementing and supplementing each other in a multilingual symbiosis, are suddenly cast as competing for spaces. Additionally, multilingual communities are then erroneously characterized as made up of distinctive monolingual enclaves” (Banda 2009, p. 2).

In these settings, students’ presumed “mother tongue” or local language become both important and problematic in the conceptualization and implementation of educational policies. In other instances, even when the language-in-education policies are allegedly intended to increase opportunities for educational access and equity, in practice, they (re)produce, perpetuate, and entrench unintended outcomes which are, by and large, inimical to some of the progressive goals of bi/multilingual education policy. On the other hand, there is the often understated ingenuity of education practitioners in postcolonial contexts, who, in complex settings characterized by policy absence and ambivalence coupled with limited teaching and learning resources, go out on a limb to operationalize a semblance of bi/multilingual education in these contexts.

These emergent discourses in bilingualism and bilingual education research and scholarship and how they apply to the highly multilingual postcolonial contexts are in line with postcolonial theorizing which entails “an attitude of critical engagement with colonialisms after-effects and its constructions of knowledge” (Radcliffe 1997, p. 1331) in search of a “conceptual frame which works to destabilize dominant discourses in the metropolitan west, to challenge inherent assumptions, and to critique the material and discursive legacies of colonialism” (Crush 1994). While the discussion in this section adopts postcolonial theorizing as the overarching theoretical scaffolding, it is also conscious of the view that “post-colonialism as a theoretical and analytical perspective includes a diverse range of perspectives: historically based critiques of colonial discourses, anthropology’s critical revision of its own colonial complicity, accounts of formations such as diasporas, studies of the cultural productions of colonized peoples and, not least, the various articulations

of those who are themselves speaking from the margins” (Jacobs 1996, p. 26). However, a core theme of postcolonial theory is “the intent to challenge the logic of linear ‘development’ and its ‘entourage of binaries’” (McClintock 1992, p. 85 cited in Jacobs 1996, p. 26). As a way of integrating these insights on postcolonial theory and the already articulated complexities attendant to bi/multilingual education policy in postcolonial contexts, the following discussion presents two vignettes from postcolonial contexts – from Kenya and South Africa – while remaining cognizant of the reality that the historical trajectories of each of the polities in the postcolonial world with their critical junctures (Acemoglu and Robinson 2012) nuance and instantiate language policy generally and bi/multilingual education policy specifically. The vignette on Kenya is entitled “Mother tongue learning in another tongue” and the one on South Africa is titled “Apartheid language-in-education policy and practice relic”.

Mother Tongue Learning in Another Tongue

At the heart of eastern Kenya, one will find Mbeere which is part of modern-day Embu County. Geolinguistically, Mbeere is an ethnolinguistic enclave surrounded by larger ethnolinguistic communities. To the north and the northeast, it shares borders with Embu and Meru, and Tharaka, respectively. To the east and south, it shares borders with Kitui and Machakos, respectively. To the west, it shares borders with Kirinyaga and Murang’a. The conterminous nature of Mbeere in relation to these other ethnolinguistic communities notwithstanding, Kimbeere – the language of the Mbeere people – is a fairly stable language without recorded or noticeable evidence of language shift. Since independence in 1963 and contrary to the Kenyan language policy that calls “for the use of the mother tongue or ‘language of the catchment area’ in the first three grades of primary school” (Trudell and Piper 2014, p. 11; Kenya Institute of Education 1992, p. 143) as well as further outlining that “in linguistically homogenous school neighborhoods, the indigenous language of the area is to be used from Standard 1 to 3 [and] in linguistically heterogeneous school neighborhoods, such as is the case in urban areas, the national language Kiswahili or English is to be used” (Bunyi 2005, p. 131), Kimbeere-speaking teachers and pupils have had to contend with Kikuyu mother tongue learning materials. Much of Mbeere consists of relatively rural-bound communities thus making it highly linguistically homogenous. In this setting, having Kimbeere mother tongue learning materials in the first years of schooling would not only be a legitimate expectation but an expression of official policy. In line with official policy, a worst case scenario would be to have Kiswahili and/or English mother tongue teaching and learning materials; not another Kenyan indigenous language – Kikuyu – as the language of mother tongue teaching and learning. Attempts at justifying the retention of Kikuyu mother tongue learning materials in Mbeere for much of Kenya’s postcolonial period can be found in the research literature such as Ogechi et al. (2012); and they mainly hinge on the erroneous view that Kimbeere and Kikuyu “have minor structural differences at the phonological and morphological levels but these do not imply

the existence of different languages” (Mwangi 2012, p. 20). At morpho-phonological, lexical-semantic, and discourse levels, Kimbeere is a distinct language with only marginal intelligibility with Kikuyu. At a policy level, the fact that Kikuyu is not spoken in Mbeere as “the mother tongue,” “the language of the catchment area,” or “the indigenous language of the area” only makes the use of Kikuyu learning materials in the first three grades of schooling in Mbeere the more tenuous didactics-wise and pedagogy-wise. It is hardly coincidental that decision-making appertaining to mother tongue education in central and eastern Kenya during the postcolonial period, at policy and program levels, has largely been at the behest of Kikuyu elites, drawn from the dominant political grouping in regional and Kenyan politics since independence.

There are several insights into bi/multilingual education in postcolonial contexts which can be drawn from this vignette. First, the fact that more than half a century after Kenya’s independence, Kimbeere teaching and learning materials have not been developed is a microcosm of “mother tongue education quandary” (Mwaniki 2014, p. 1) in postcolonial contexts in which “planning tends to be equated with policy-making alone, while implementation tends to be treated with lack of serious concern or even downright levity” (Bamgbose 1999, p. 18). This approach also entails “‘implementation avoidance strategy’ which consists of policy-makers formulating a policy, which they have no intention of implementing (or know they cannot be implemented), building into the policy escape clauses, and leaving implementation strategies unspecified as to modalities, time frame, and measures to ensure compliance” (Bamgbose 1999, p. 19). Second, the assumption that colonial languages adopted as languages of teaching and learning in much of the postcolonial world are the only hindrance to the actualization of bi/multilingual education does not always hold true. Dominant indigenous languages are worthy accomplices in subverting the implementation of bi/multilingual education for minority children; often riding on the power of the governing elite (and their networks in academia/research) to determine what code constitutes a language/dialect and thus a mother tongue worthy of being included in the curriculum and in effect worthy of being resourced from the national fiscus. A third insight from this vignette would entail an invitation to critically question the complicity of postcolonial elites, especially from dominant political and ethnolinguistic groups, in pursuing educational policies that are inimical to the educational needs of ethnolinguistic minority children as part of colonialism’s aftereffects. The “policy” that keeps Kikuyu teaching and learning materials in Mbeere schools more than 50 years after Kenya’s independence is a material and discursive legacy of postcolonial indigenous domination of minorities.

A last insight, but not any less important, relates to how teachers and learners negotiate the problematic learning situation created by the lack of Kimbeere teaching and learning materials. In line with research literature on bilingualism and bilingual education, the concept of “diglossia without bilingualism” (Fishman 1972, 1980; Baker 2011) could be used to explain how teachers and learners negotiate this problematic situation. However, because the use of Kikuyu learning materials is restricted to mother tongue classes, and not other subjects or other interactions outside the classroom, the most apt description would be “restricted diglossia

without bilingualism,” a description that would explain why there is no noticeable Kimbeere-Kikuyu bilingualism or language shift to Kikuyu. In this complex setting, in which teachers are seemingly left to their own devices, the implementation and actualization of a semblance to bilingual education rests almost entirely on the ingenuity/circumspection of teachers in implementing official policy. This in itself is a matter for further research.

Apartheid Language-in-Education Policy and Practice Relic

Jan Blommaert (1996) noted a few years after South Africa’s democratic transition that “the historical changes in South Africa triggered a new enthusiasm among language scholars, and almost automatically drove them into the direction of language planning issues because of the nature of the political-ideological debate surrounding the end of apartheid” (p. 203). Fascination with South Africa’s official languages dispensation endures to the present because for many researchers, South Africa, with its tempestuous history that saw “342 years of white domination, some of it under Dutch and British colonialism, and some under indigenous Afrikaner-led apartheid” (Venter 2009, p. 3) is a “near perfect” social laboratory in which language dynamics are not only critical but catalytic. Despite the legitimate fascination, it masks the persistence of apartheid era language-in-education policies and practices especially within a section of South Africa’s higher education sector often referred to as Historically Afrikaans-medium Universities (HAUs), which in itself is an aberration because some of these universities have strong and well-documented “English as a language of teaching and learning” history (cf. Du Plessis 2006). Antecedents of these apartheid era language-in-education policies in HAUs, known as parallel-medium education, are traceable to “Milnerism”; “a rabid, racist and narrow ethnic chauvinism, based essentially on shared language, religious orientation and alleged descent among white Afrikaans-speaking people” which “helped to entrench the racist version of Afrikaner nationalism that eventually gave birth to the political policy of apartheid” (Alexander 2003, p. 8). A lasting legacy of these developments on language-in-education in HAUs is what Reagan (1987, p. 299) aptly refers to as “politics of linguistic apartheid” which “rests on two interrelated pillars: the ‘ideology of apartheid’ and the ‘mother tongue principle’” (Reagan 1987, p. 300). Kamwangamalu (1997, p. 236) corroborates these views by noting that “language-in-education policies in South Africa have historically been based on racial discrimination by one segment of South Africa’s population, the whites, against another segment, the blacks.” In modern-day South Africa HAUs, these ideological and policy undercurrents have found expression, in policy and practice, through parallel-medium education in which Afrikaans and the so-called English-speaking students (students from all other ethnolinguistic groups) attend different lectures often under different tutors; and in the odd case, with language facilitation in lectures.

When this peculiar higher education learning and teaching arrangement is analyzed against the typology of bilingual education (Baker 2011, pp. 209–210), it falls

under “monolingual forms of education for bilinguals.” Under this typology, parallel-medium education will aptly fit into the “segregationist” type of program; with the typical student type being “from a language minority” (cf. Henrard 2001 for a detailed argument as to why all ethnolinguistic groups in South Africa are minorities); with the language of the lecture room being “minority language (forced, no choice), by default”; with the societal and educational aim being “apartheid”; and the aim in language outcome being “monolingualism”. This analysis is corroborated by Du Plessis (2006, p. 107) who unwittingly observes that “the preference for parallel-medium education creates the impression that the historically Afrikaans-medium universities are more interested in survival than in the notion of bilingual higher education.” The persistence of these language-in-education policies at the threshold of the third decade of democracy demonstrate “the extent to which South Africa’s education system remains unreformed and continues to perpetuate social injustice(s), especially in its higher education sector” (Mwaniki 2012, p. 214).

Against the backdrop of South Africa’s tempestuous history as well as peculiar contemporary circumstances, a few insights into bi/multilingual education in postcolonial contexts could be drawn from this vignette. First, in a postcolonial context like South Africa in which language “has effectively been used to serve the ends of social exclusion for some and social inclusion for others” as well as being “deployed to serve ends that neither entrench nor deepen social justice” (Mwaniki 2012, p. 214), an actualization of bi/multilingual education policies that seek to increase opportunities for educational access and equity in higher education remain, to paraphrase Furlong and Cartmel (2009, p. 4), is a political bullet that few university administrators in HAUs are prepared to bite, partially because it would involve the imposition of restrictions on opportunities of their families and members of their social and economic networks, which could alienate a large section of their political base. A second insight which logically flows from the preceding one is that bi/multilingual education is often a site for the (re)production of asymmetrical power relations and discourses in postcolonial contexts. Thirdly, under the weight of history and when not managed in a progressive manner that takes into account access and equity parameters, bi/multilingual education has the potential to accentuate ethnolinguistic cleavages in postcolonial contexts.

Conclusion: The Current State and Future Prospects for Bi/Multilingual Education

Advances in politics and sociology of language scholarship may not yet be at a point of developing a *problematique*, i.e., “a structural model of relationships among members of a set of problems” (Warfield and Perino 1999, p. 221), to fully account for the often problematic permutations attendant to bi/multilingual education in postcolonial contexts, but a critical engagement with the material and discursive aftereffects of the colonial experience (including indigenization of colonial constructs and discourses) on policy and practice would be a good starting point. A key aspect of this endeavor would be to expose and interrogate the complicity of politics

and sociology of language scholarship in perpetuating colonial legacies in bi/multilingual education in postcolonial contexts. These observations notwithstanding, bi/multilingual education in postcolonial contexts remains a potent tool for social, political, and economic inclusion of marginalized groups.

Cross-References

- ▶ [Bilingual Education in Sub-Saharan Africa: Policies and Practice](#)
- ▶ [Bilingualism in South Africa: Reconnecting with Ubuntu translanguaging](#)

Related Articles in the Encyclopedia of Language and Education

- Bernard Spolsky: [Language Policy in Education: History, Theory, Praxis](#). In Volume: Language Policy and Political Issues in Education
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Language Rights and Bilingual Education

Tove Skutnabb-Kangas

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Abstract

Are Indigenous and minority children guaranteed a right to learn both their own languages and at least a/the dominant language in their country of residence, up to a high formal level, through bilingual education of various kinds, most importantly including a right to mother-tongue-based multilingual (MTM) education (see Skutnabb-Kangas and McCarty 2008 for definitions)? Do schools support Indigenous/tribal/minority communities' right to reproduce themselves as Indigenous/tribal peoples/minorities (ITMs), through enabling and encouraging intergenerational transfer of their languages? In other words, do ITM children enjoy linguistic human rights (LHRs) in education?

This chapter attempts to answer these questions. It analyses how bilingual education intersects with issues of language rights (LRs). It presents some of the important international and regional legal provisions and it discusses their implications.

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The conclusion is that there are still relatively few binding **positive** rights to MTM education or bilingual education in present international law, including case law. Today most language-related human rights are **negative** rights, only prohibiting discrimination on the basis of language. Explanations and interpretations of human rights law and many court cases have made it clear that treating citizens de jure equally, i.e., identically (for instance, using an official language as the only medium of education for *all* children, regardless of their linguistic background and competencies) does not lead to de facto equality and may often constitute discrimination. Identical treatment is not always equal treatment. “Positive discrimination” or “affirmative action” is necessary for substantive de facto equality. Neoliberal ideologies are disastrous for ITMs human rights.

Keywords

Indigenous education • Minority education • Linguistic Human Rights • Mother-tongue-based multilingual education • Human rights law

Introduction

To what extent are indigenous and minority children guaranteed a right to learn both their own languages and at least a/the dominant language in the country where they live, up to a high formal level, through bilingual education of various kinds, most importantly including a right to mother-tongue-based multilingual education (see Skutnabb-Kangas and McCarty (2008) for definitions)? Do all children have the right to access high quality education, regardless of what their mother tongue is? Do schools support Indigenous/tribal/minority communities’ right to reproduce themselves as Indigenous/tribal peoples/minorities (hereafter ITMs), through enabling and encouraging intergenerational transfer of their languages? In other words, do ITM children enjoy linguistic human rights (LHRs) in education?

This chapter attempts to answer these questions by analyzing how bilingual education intersects with issues of language rights (LRs), by presenting some of the important international and regional legal provisions and discussing their implications. Much more about these human rights instruments (legal provisions of various kinds are called instruments in legal texts) is presented in Skutnabb-Kangas and Dunbar (2010).

Research on educational performance indicates that ITM children taught through the medium of a dominant language in submersion programs often perform considerably less well than native dominant language speaking children in the same class, in general and on tests of both (dominant) language and school achievement. They suffer from higher levels of push-out rates, stay in school fewer years, have higher figures for unemployment and, for some groups, drugs use, criminality, and suicide figures. There is strong evidence that such children do not benefit from the right to education to the same extent as children whose mother tongue is the teaching language of the school, and that this distinction is based on language. Those (mostly Asian immigrant minority) groups that show a more positive pattern (e.g., in Canada,

the USA, even the UK) seem to do this not because of the way their education is organized but despite it.

Given the educational benefits of mother-tongue-based multilingual (MTM) education and, as importantly, the educational harm of education of ITM children mainly through another language, it can be forcefully argued that only MTM education, at least in primary school, is consistent with the provisions of several human rights documents (see Skutnabb-Kangas and Dunbar 2010 for elaboration). No other form of education seems to guarantee the full development of the human personality and the sense of its dignity nor does it enable children who are subject to non-MTM education to participate as effectively in society. There is much research that shows that maintenance-oriented MTM education (with good teaching of a dominant language as a second language, with bilingual teachers) is often the best way to enhance ITM children's high-level bilingualism, school achievement, a positive development of identity and self-confidence, and their future life chances (see "► [Bilingual Education: What the Research Tells Us](#)" by May, this volume).

Early Developments

Particularly in the case of higher formal education, instruction has for millennia been in languages other than the students' mother tongues, often in classical languages used for religious purposes (e.g., Sanskrit or Latin), but both the teachers and the students were usually multilingual. The "rules" for the diglossic/multiglossic division of labor between languages were in practice flexible. The learning of both languages and content was often lifelong, for instance, in monasteries, east and west. The education could be called bi- or multilingual in the sense that several languages were used in instructional situations, at least orally.

In contrast to deciding the religion ("*cuius regio, eius religio*"), feudal landlords globally were in most cases not interested in what languages their underlings spoke, as long as their labor could be exploited ("exchanged for protection"). Whatever education there was was in most cases informal and through the medium of the various mother tongues. This was also the case with indigenous peoples worldwide before colonization, even if many learned neighboring and other languages through peaceful contacts or sometimes conflict.

Colonization and creation of state borders had a decisive role in formally minorizing certain languages and, correspondingly, majorizing others. Religion has played a major role in denying ITMs educational LHRs. Indigenous peoples were to be "civilized" through assimilation into the colonizers' "superior" cultures and languages (see, e.g., Churchill 1997; Crawford 1995; Del Valle 2003; Fesl 1993; Milloy 1999; Richardson 1993; Skutnabb-Kangas 2000). Some missionary work has ironically also "saved" some forms of Indigenous languages (in Africa, Australia, Canada, Latin America, the USA, etc.); missionaries learned and wrote down (some of) these languages, to be more efficient in capturing the souls of the "pagans." Initially, Indigenous peoples had the land (and their own religions); when they woke up, they had the bible but the states that the missionaries came from had the land.

Often missionaries not only used distorted and reduced versions of indigenous languages in their “bilingual education”; they also created new “languages” and divisions between “languages,” thereby further minorizing them. In colonies, several different models of language regimes coexisted in education, with colonial languages and local languages used as languages of instruction. The patterns and motivations varied hugely; they have still not been properly clarified globally (see, e.g., Phillipson 1992; Pennycook 1998) and are being vigorously debated.

In general, multilingualism and to a large extent MTM education have been accepted and normalized among citizens outside the western world; colonization was mainly responsible for the new negative linguistic inequalities. But even in the west, until the mid-1800s attitudes towards multilingualism and multilingual education were more relaxed or at least more indifferent and even tolerant than during the last 150 years. This was true more for national and sometimes immigrant minorities (who could be majorities in their own regions) than Indigenous peoples. Some “national” or “traditional” minorities did and still do have some language rights in Europe. These rights were also recognized in education already in the late 1800s, in both constitutions and in bi- and multilateral treaties, even if many were granted to religious minorities, and a religion different from the dominant one often coincided with speaking another language. In the USA, laws were published in German and English in Ohio and Pennsylvania, in Spanish and English in California and New Mexico, and in French and English in Louisiana, while children had a right to minority language medium or bilingual education as a self-evident part of the system (Del Valle 2003, pp. 10–17). But even some Indigenous peoples controlled their own education, e.g., the Cherokee, Cree, Choctaw, Chickasaw, and Seminole between 1830 and 1898 in the USA (Del Valle 2003, p. 282).

During the last decades of the 1800s, with the labor and disciplining needs of industrialization, more children started to come into the realm of formal education, concurrently with the spread of nation-state ideologies (one nation – one state – one language). In the western world, “pernicious” boarding schools for Indigenous children arose “whose overt purpose was cultural genocide, including most prominently the eradication of Indian languages use,” writes James Fife about the USA (2005, p. 365, quoting Allison Dussias 1999). These residential schools have been “arguably, the most damaging of the many elements of Canada’s colonization of this land’s original peoples and, as their consequences still affect the lives of Aboriginal people today, they remain so” (Milloy 1999, p. xiv).

Indigenous peoples often knew themselves the disastrous consequences of the “white” education from very early on. Handsome Lake, a Seneca born in 1735, a Confederacy Chief of Six Nations, “created a code to strengthen his people against the effects of white society. The code helped to unify the Iroquoian community.” Chief Jacob Thomas’s 1994 book contains *The Code of Handsome Lake* (“The Good Message”). According to Thomas (1994, pp. 41–42), Handsome Lake (a Seneca prophet, born 1735) told his people:

We feel that the white race will take away the culture, traditions, and language of the red race. When your people’s children become educated in the way of white people, they will no

longer speak their own language and will not understand their own culture. Your people will suffer great misery and not be able to understand their elders anymore. We feel that when they become educated, not a single child will come back and stand at your side because they will no longer speak your language or have any knowledge of their culture.

Chief Thomas noted that the actual results of education imposed by the “white race” were as destructive as Handsome Lake had predicted:

Two children were selected from each tribe to receive the white race’s education. The chiefs at the time believed that this education might benefit the native people. By following the Good Message, the chiefs discovered that the education received from the white race robbed their children of their language and culture. They realized the importance of educating their own children.

States and educational authorities (including churches) in many parts of the world (including the Nordic countries) have also at the latest since the end of the 1800s had the knowledge about the negative results of submersion education and the superior results of even transitional bilingual education (where the mother tongues are used as teaching languages for some years before transitioning children to a dominant language medium education). For instance, the USA Board of Indian Commissioners wrote in their 1880 report (quoted in Francis and Reyhner 2002):

... first teaching the children to read and write in their own language enables them to master English with more ease when they take up that study. [...] A child beginning a four years’ course with the study of Dakota would be further advanced in English at the end of the term than one who had not been instructed in Dakota (p. 77). [...] It is true that by beginning in the Indian tongue and then putting the students into English studies our missionaries say that after three or four years their English is better than it would have been if they had begun entirely with English (p. 98).

The earliest formal descriptions of various LRs (or, in many cases, lack of them), even in education, were mainly written by lawyers, often for administrative purposes. The time after the First World War produced, often inspired directly or indirectly by the League of Nations, a large number of language rights documents and research and other accounts about them. The LRs situation in Europe was then on paper better than it is internationally today: in the Minorities Treaties that were passed with the Peace Treaties in Paris, many minorities were granted LRs in education. The problem then – as to a large extent today too – was lack of implementation and enforcement.

Major Contributions

During the first three decades after the Second “World” War, various United Nations bodies, nongovernmental organizations (NGOs), and academic institutions engaged in lively discussions on the lack of language rights in (monolingual and bilingual) education. A variety of historical descriptions and analyses were written by

sociolinguists, educationists, and lawyers. New demands, including court cases with direct or indirect bearing on language rights in education, started to come forward (see Del Valle 2003, for the USA).

The UN Sub-Commission on the Prevention of Discrimination and Protection of Minorities did suggest some positive measures, especially in a 1967 report (see Gromacki 1992, p. 544). But it was not until the UN Special Rapporteur on the Rights of Minorities, Francesco Capotorti, published his 1979 report that international and regional (human rights) law in the area of language rights and education started to develop. After some early discussions (e.g., Tabory 1980), some language rights have started to be accepted as linguistic human rights during the last 15–20 years (see Skutnabb-Kangas and Phillipson 1994; de Varennes 1996, 2000). There are many useful overview articles about LRs that include education (Google LHRs).

Indigenous peoples and minorities are provided with some general protections under various UN and regional charters and conventions. The **UN Convention on the Rights of the Child** of 1989 (CRC) has been ratified by more countries than any other UN human rights document – the only country (as of April 20, 2016) that has failed to ratify it is the USA. But while Art. 17, para 1 of the **African Charter on Human and Peoples' Rights** of 1981 provides that every individual shall have the right to education, the USA Constitution does not grant such a right. Para 1(c) of Art. 29 in CRC provides that the education of the child shall be directed “to the development of respect for the child’s parents, *his or her own cultural identity, language and values*, for the national values of the country in which the child is living, the country from which he or she may originate, and for civilizations different from his or her own.” Art. 13, para 1 of the **International Covenant on Economic, Social and Cultural Rights** (ICESCR) of 1966 (in force 1976) provides that the States Party to the Convention recognize the right of *everyone* to education. Similarly, Art. 28, para 1 of the CRC provides that States Parties recognize the right of *the child* to education and specifies that States Parties shall “take measures to encourage regular attendance at schools and the reduction of drop-out rates” (subpara (e)). Given what we know about the effects of enforced dominant language medium educational policies, which tend to result not only in considerably poorer performance results but also higher levels of noncompletion, etc., the pursuit of such policies could be said to be contrary to subpara 1(e) of Art. 28. Combined with the comments made with respect to Art. 13, para 1 of the ICESCR, it would seem clear that an education in a language other than the child’s mother tongue and which contains no recognition of that mother tongue is unlikely to contribute to the respect for the child’s own cultural identity, language, and values, i.e., this kind of education violates the demands of the Conventions.

Art. 30 of the **Convention on the Rights of the Child** provides that “in those States in which ethnic, religious or linguistic minorities or persons of indigenous origin exist, a child belonging to such a minority or who is indigenous shall not be denied the right, in community with other members of his or her group, to enjoy his or her own culture, to profess and practice his or her own religion, or to use his or her own language.” This provision echoes Art. 27 of the **International Covenant on Civil and Political Rights** of 1966 (in force, 1976). The precise implications of both

provisions are, however, far from clear. The Human Rights Committee has noted in its General Comment No. 23 of 1994 on Art. 27 of the ICCPR that, although phrased in the negative, the Article requires States to take positive measures in support of minorities. Unfortunately, the Human Rights Committee has not spelled out what those measures are or whether they include measures relating to MTM education.

ITMs are also protected by specific language rights regulations in some countries and regions. In contrast, other countries (e.g., Denmark, France) are even contemplating violating parents' right to speak their own languages to their infants in their own homes.

The provisions which more specifically address minority language education rights – both the teaching of and through the medium of one's mother tongue – are generally most developed in certain minority legal provisions. Binding treaty commitments have been established in two Council of Europe human rights instruments to which only members of the Council have thus far become party, the **Framework Convention for the Protection of National Minorities** and the **European Charter for Regional or Minority Languages**. Other very influential nontreaty standards have been set within the Organization for Security and Co-operation in Europe (OSCE), the most significant of which is the 1990 **Document of the Copenhagen Meeting on the Human Dimension**. Influential principles have been developed through the office of the OSCE High Commissioner on National Minorities, the most relevant of which in the context of education is **The Hague Recommendations Regarding the Education Rights of National Minorities** of October, 1996 (<http://www.osce.org/hcnm/32180>). More particular guidance is provided in minorities-specific legal provisions. All of these standards apply mainly in Europe (loosely defined; Canada and the USA are also members of the OSCE).

Work in Progress

There are still relatively few binding **positive** rights to MTM education or bilingual education in present international law, including case law. Today most language-related human rights are **negative** rights, only prohibiting discrimination on the basis of language, as a prerequisite for the promotion of equality. Both various explanations and interpretations of human rights law and many court cases (see, e.g., de Varennes 1996; Higgins 2003; Thornberry 1997, 2002; Thornberry and Gibbons 1997) have made it clear that treating citizens de jure equally, i.e., identically (for instance, using an official language as the only medium of education for *all* children, regardless of their linguistic background and competencies) does not lead to de facto equality and may often constitute discrimination. Identical treatment is not always equal treatment; therefore, “positive discrimination” or “affirmative action” is necessary for substantive de facto equality. Substantive equality also includes a positive obligation on the state to protect conditions, which enable ITMs to maintain their special features, including their languages. Still, many court cases and UN Human Rights Committee's General Comments and Communications have been satisfied with formal equality, even if there are also positive exceptions (most of the legal

references above detail these), both in relation to LRs in general and also educational LHRs. At this point there are still many contradictions in, and confusion about, how to handle educational LRs legally and de facto. Today's "free market" approach has also many really negative consequences for these rights (e.g., Devidal 2004).

UNESCO is mapping today's situation in relation to which LMs do in fact have MTM education (see <http://www.unesco.org/new/en/culture/themes/endangered-languages/>), Unesco's report from February 2016 (<http://unesdoc.unesco.org/images/0024/002437/243713E.pdf>) recommends minimally six years of MTM education.

In contrast to earlier, there seems today to be more understanding, on paper, for the demands of indigenous peoples educational LRs – presumably because most of them are numerically so small that **their** educational LRs (as opposed to those of minorities) do not seem to threaten the states – whereas their land rights demands do.

UNDRIP, the **United Nations Declaration on the Rights of Indigenous Peoples** (Resolution A/61/L.67, September 13, 2007), provides in Articles 13.1-2 and 14.1 the right for an Indigenous child to learn the mother tongue and in 14.2 access to the "education of the State"; the child does not have this access without knowing the State language; hence high levels of at least bilingualism must be a goal in the education of an Indigenous child. But since state education through the medium of the dominant state language is "free" (although there are school fees even in elementary education in many countries where Indigenous peoples live), most Indigenous children are forced to "choose" the "state education." Their parents are "free" to establish and control their own educational systems, with their own languages as teaching languages – but at their own cost. How many Indigenous and tribal peoples can afford this? There is nothing about the State having to allocate public resources to Indigenous-language-medium education.

Aspects of these recommendations bear some similarity to the educational provisions of the United Nations General Assembly **Declaration of the Rights of Persons Belonging to National or Ethnic, Religious and Linguistic Minorities** of 1992 ([UNGA Minorities Resolution](#)). Art. 4, para 3 provides that "States *should* take *appropriate* measures so that, *wherever possible*, persons belonging to minorities have *adequate* opportunities to learn their mother tongue *or* to have instruction in their mother tongue." (emphases added).

Problems and Difficulties

Despite both the positive tone of these and other recommendations, and the high level of awareness and networking of many ITMs, opt-outs and claw-backs in educational provisions for ITMs are significant. In order for children to have human rights in education, they must in the first place have a **right to free compulsory education**. This right is far from guaranteed in all countries to all children. Not even primary education is free in 91 countries (Tomaševski 2004, p. 23), and immigrant or refugee children face threats of exclusion from schools in many countries (e.g., Del Valle 2003, p. 331; Eurydice 2004, pp. 33–34).

Secondly, however, as Katarina Tomaševski, the former UN Special Rapporteur on the Right to Education, states, “mere access to educational institutions, difficult as it may be to achieve in practice, does not amount to the right to education” (Tomaševski 2004: para 57; see also her brilliant 2006). Educational State obligations in international law contain four elements – *availability, accessibility, acceptability, and adaptability*. Tomaševski discusses “language of instruction” under “acceptability” (2001, pp. 12–15, 29–30); it can also be seen as “accessibility” (see Skutnabb-Kangas and Dunbar 2010 for details). Barriers to “access” can be interpreted as **physical** (e.g., distance to school), **financial** (e.g., school fees, already mentioned, or the labor of girls being needed at home), **administrative** (e.g., requirements of birth registration or residence certificate for school enrolment, *ibid.* para 4b; or, e.g., school schedules, Tomaševski 2001, p. 12), or **legal**. If the educational model chosen for a school (legally or administratively) does not mandate or even allow ITMs to be educated mainly through the medium of a language that the child understands, then the child is effectively being denied access to education. If the teaching language is foreign to the child and the teacher is not properly trained to make input comprehensible in the foreign language, the child does not have access to education. The US Supreme Court acknowledged this in 1974 in the *Lau v. Nichols* case (414 US 563). Likewise, if the language of instruction is neither the mother tongue/first language or minimally an extremely well-known second language of the child and the teaching is planned and directed towards children who have the language of instruction as their mother tongue (i.e., the norm is a child who knows the teaching language), the LM child does not have equal access to education. We see this as a combination of **linguistic, pedagogical, and psychological** barriers to “access” to education.

The present practices of educating ITM children through the medium of dominant national/state languages are completely contrary to solid theories and research results about how best to achieve the goals for good education. They violate the parents’ right to intergenerational transmission of their values, including their languages. The human right to use one’s own language is made impossible if the children lose it during the educational process. These practices can be seen psychologically, linguistically, educationally, and sociologically as genocide according to definitions 2b and 2e in UN’s Convention on the Prevention and Punishment of the Crime of Genocide; they can also be seen as crimes against humanity, as we show in Skutnabb-Kangas and Dunbar 2010.

Future Directions

Comparing the various developments in how human rights instruments, courts, and various regulations have handled educational LHRs during the last many decades, there seems to be a constant tension in how the place, function, and future of ITMs (seen as Other) have been envisaged. States seem to strive towards some kind of unity, wholeness, integration, but ideas about how this can be achieved vary.

Segregation versus integration and bilingual versus monolingual are some of the main polarities here.

The Other has often been feared, despised, marginalized, and excluded, and a separate physically segregated development has been seen as necessary and preferable. At the same time, the Other has been strictly controlled and disciplined. South African (SA) apartheid Bantu education or US (especially South) black and white schools are examples. The only positive aspect of this kind of education in SA was that ITMs often had MTM education. But the quality and financing of the education in both SA and the USA, including buildings, materials, teacher training, etc., were mostly dismal and the content often racist. Legally mandated (the *Brown v. Board of Education 1954* case in the USA) or allowed (SA 1990s Constitution and education regulations) desegregation brought the Other into schools which were earlier reserved only for Self, the “whites.” Physically it may have meant permission for integration, but housing patterns interacting with class ensure that “race” turned “ethnicity” still keep most quality education for children of Self. And medium of education interacts with it; Kathleen Heugh’s (2000) countrywide longitudinal statistical study of final exam results for “Black” students in South Africa showed that the percentage of “Black” students who passed their exams went down every time the number of years spent through the medium of their mother tongues decreased.

In the other polarity, a reproduction of minorities through MTM or proper bilingual education has been seen as a threat towards the unity of a state. Linguistic reproduction of minority mother tongues has been seen as a beginning of a conflict where states have feared that the existence of minorities can lead to a disintegration of the state. The Turkish oppression of Kurds is perhaps the worst example of this today; but in Europe, both France and Greece violate LHRs for similar reasons, and the same reason has been frequently invoked in the USA, pointing at the possibility of Quebec separation from the rest of Canada as a threatening example. Many Asian and African conflicts also have elements of state elites connecting minoritized groups to disintegration threats and therefore denying them basic language rights. This seems to be one of the main reasons in state resistance against proper bilingual education in many countries. Even if the scientific evidence for bilingual education is compelling, assimilationist mainstreaming mostly wins because MTM maintenance-oriented education can reproduce minorities as minorities. Likewise, content in bilingual education is seen as possibly ideologically threatening because it cannot (for linguistic reasons) be completely controlled by the dominant group.

All this can lead to interesting contradictions – and their solution is a major future challenge. My chapter in the second edition of this handbook has some examples from the USA and Europe.

Majority/dominant group children do not have any right to become high level bi- or multilingual through education either. This is so even if many states are in practice organizing programs for them to achieve this goal, e.g., immersion or CLIL – content and language integrated learning – programs. Thus, accepting temporary physical segregation as a means for achieving educational, psychological, societal, and

political integration of minorities and majorities later on is an absolute necessity for a human-rights-oriented education.

Many peace researchers have shown that it is often precisely lack of language rights that leads to conflict and that LHRs, also in education, may be part of the solution. Yet, most states continue the schizophrenic and counterproductive policies of denying indigenous and national and immigrant minority children basic linguistic human rights, including in education. States can expect to have to pay huge reparations if this is continued – the first court cases have already been won by ITMs. The whole human rights “business” has been impressively denounced by Hopgood (2013) but not in ways that invalidates arguments in this chapter. On the other hand, in my view, the neoliberal researchers skeptical of MTM do not really have a case. The primary principles of neoliberalism are that market forces should determine everything in our societies, that all services can be commodified, and that this “freedom” is in the interest of all. This ignores the reality of social classes and the fact that those with financial or cultural capital, including linguistic capital, are structurally favored in this economic universe. Social justice is ignored. Dominant languages are privileged; ITM mother tongues are seen as unwelcome and obsolete. Deep ITM identity issues are ridiculed, and (forced) assimilation is seen as being in the best interest of ITMs, economically and politically. Education to achieve a harmonious, just society is not on the neoliberal agenda.

Cross-References

- ▶ [Bilingual Education for Indigenous Peoples in Mexico](#)
- ▶ [Bilingual Education: What the Research Tells Us](#)
- ▶ [Indigenous Bilingual and Revitalization-Immersion Education in Canada and the USA](#)
- ▶ [Indigenous Bilingual Education in Latin America](#)
- ▶ [Key Concepts in Bilingual Education](#)

Related Articles in the Encyclopedia of Language and Education

- James Tollefson: [Language Planning in Education](#). In Volume: Language Policy and Political Issues in Education
- Leanne Hinton: [Language Endangerment and Revitalization](#). In Volume: Language Policy and Political Issues in Education
- Stephen May: [Language Education, Pluralism, and Citizenship](#). In Volume: Language Policy and Political Issues in Education
- T. Skutnabb-Kangas, S. May: [Linguistic Human Rights in Education](#). In Volume: Language Policy and Political Issues
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Key Concepts in Bilingual Education

Wayne E. Wright and Colin Baker

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Abstract

This chapter provides a broad overview of historical and contemporary key concepts in bilingual education while noting the ambiguous definitions and varying purposes and sometimes conflicting aims as driven by ideologies and

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politics. Major contributions and work in progress are considered through traditional program models and efforts to extend bilingual education to varying student populations and global contexts. Problems associated with determining effectiveness are discussed, along with challenges to the traditional concepts of program models based on new scholarship challenging monolingual perspectives and encouraging multilingual understandings of bilingualism as dynamic classroom practices that do not insist on the strict separation of languages. We conclude with a discussion of future directions in bilingual education related to school, classroom, and student-level concepts.

Keywords

Bilingual Education • Immersion Bilingual Education • Transitional Bilingual Education • Dual Language Bilingual Education • Deaf Students Special Education • Gifted Bilingual Education • School Effectiveness

Introduction

This chapter provides a broad introduction to the origins, aims, and varieties of bilingual education. It shows that bilingual education is an ambiguous term with aims that variously include the assimilation of immigrants, helping children to gain employment through multilingual competences, increasing school achievement, and helping to preserve a minority language. The varieties of bilingual education discussed include United States Dual Language bilingual education and the Canadian immersion bilingual education. In these two varieties, there is a considerable volume of research attesting to the relative success and effectiveness of their programs. Recent developments have taken place in bilingual and multilingual education in major international languages, as well as in bilingual education for Deaf students, thus expanding the types of students who can benefit from such education. While there is less research on bilingual special education and on gifted and talented bilingual education, such topics are of current international interest. Such variety in bilingual education aims and styles means that simple definitions are typically misleading, but the term “bilingual education” often refers to education where two (or more) languages are used for teaching and learning for some, most, or all of the curriculum.

The chapter discusses the difficulties of research into the effectiveness of bilingual education, including the variety of possible outcomes from some such education: academic, social, personality, and employment at an individual level but also social integration and cohesion, language revitalization, and school performance at a local and national level. Arguments about important outcomes from bilingual education also include a movement from outlining effective models and varieties to discussing effective practices, particularly at the classroom level. The chapter ends by discussing the importance of: highly effective staff in bilingual classrooms; language leadership particularly at the school level; achieving high standards of literacy in the languages of the home and school; the involvement of parents and the

local community; classroom strategies for the distribution of two or more languages in instruction and learning; and the value of translanguaging inside and outside the curriculum.

Early Developments

Bilingual education may be as old as education itself and likely used in formal and informal settings where students lived in language contact centers. However, bilingual education is an ambiguous term with many different aims and outcomes within its varieties. For example, the term has been used when students in the school are bilingual, but the emphasis is on just the majority language with only minimal support provided in the home language. Yet the term bilingual education is more accurately used when both languages are used for daily classroom instruction and the students become successfully bilingual and biliterate.

Such variety is revealed in one of the early discussions of international bilingual education by Ferguson et al. (1997) who suggested ten varying, sometimes conflicting, aims of bilingual education: (1) to assimilate individuals or groups into the mainstream of society; (2) to bring unity to multiethnic or multilingualistic country; (3) to enable people to communicate outside their country; (4) to increase language competencies that are marketable, for example, to gain employment; (5) to preserve ethnic or religious identity; (6) to harmonize different linguistic and political communities; (7) to spread the use of a colonial language; (8) to strengthen elite groups and preserve their privileged position in society; (9) to give equal status or rights to unequal languages; and (10) to deepen an understanding of language and culture. To modernize this list can be added: (11) to preserve an endangered or minority language and (12) to increase curriculum achievement and school performance. These two additions highlight that bilingual education aims can be societal (e.g., language planning within a region) but also for the individual child (e.g., the potential communication, cultural, cognitive, character, curriculum, and economic advantages for each student). Thus the aims of bilingual education relate not just to school and classroom pedagogic practices but also to wider societal aims, and different types of bilingual education have varied underlying philosophies, policies, provisions, practices, and not least different politics.

Major Contributions and Work in Progress

Major contributions of bilingual education may be considered through the ways in which it has been conceptualized ideologically and implemented politically with varying linguistic and sociopolitical aims. At the same time, these options may be considered work in progress, given ongoing debates and efforts to extend bilingual instruction to different students in a variety of contexts. Several varieties are now

considered, with the caveat that outlining particular forms of bilingual education in this manner is a simplistic and reductionist way of exploring the complexity of bilingual education.

Developmental Maintenance Language Bilingual Education

Variably called “maintenance,” “developmental maintenance,” “indigenous,” “native,” and “heritage language” bilingual education, such school programs are mostly, but not exclusively, for language minority children. Some, much, or most of the curriculum is provided in the child’s home language. Some examples are programs for Navajo in the USA, Māori in New Zealand, Basque in Spain, and Chinese in Cambodia. Most programs are found at the primary school level, and the amount of curriculum time in the minority language is typically between 50 % and 90 %. Developmental maintenance programs aim for students to become bilingual and biliterate in the home and majority languages. In some contexts, the aims may also include a desire to preserve a minority language in its historical strongholds, especially when that language and its culture are deemed threatened.

Immersion Bilingual Education

Canadian education has a high international reputation for its immersion bilingual schools where first-language English speakers are taught mostly or partly through the medium of French. The “immersion” student already owns one prestigious language and acquires another high-status language in school. Immersion children in Canada usually: (1) become bilingual and biliterate, (2) reach normal achievement levels throughout the curriculum including languages, (3) have an enhanced appreciation of the traditions and culture of both French-speaking and English-speaking Canadians, and (4) potentially have an edge in the employment market. Immersion bilingual education has particular variations in the age at which a child commences the experience (*early, delayed, or late immersion*) and the amount of time spent in the immersion second language, ranging from commencing with 100 % immersion in the second language (total immersion) to about 50 % (partial immersion). Immersion teachers are competent bilinguals but initially appear to the younger children as able to speak French but only understand (and not speak) English. Canadian immersion education has the most thorough research of any bilingual education model. Hence, claims for its effectiveness and considerable success are well grounded and amply supported.

Adaptation of Canadian immersion has occurred internationally in countries such as Finland, the Basque Country, Singapore, Hong Kong, Israel, United States, New Zealand, Ireland, and Wales. Such adaptations sometimes use (even misuse) the brand name of immersion rather than paralleling the successful Canadian model. For example, structured (or sheltered) English immersion in the United States is a

monolingual assimilationist program that immerses linguistic minority children into English, without any efforts to develop or maintain students' home languages.

Transitional Bilingual Education

Transitional bilingual education is the most common form of bilingual education in the USA and has received the most financial support from the federal government. It allows temporary development and use of students' home languages for literacy and content-area instruction. The aim is to rapidly transition students to majority language monolingual instruction by increasing use of the majority language while proportionately decreasing use of the home language. Thus the dominant aim is for the student to move to learning in the dominant language of the region and not for the development of the home language.

Two main types of transitional bilingual education are mostly found in primary schools: "early exit" (typically K-3) and "late exit" (typically up to 5th or 6th grade). Both may have benefits for self-esteem and curriculum progress compared with mainstreaming, and its proponents argue that it provides equality of opportunity in adjusting to mainstream society. Its critics suggest that it is a remedial, compensatory, and segregating program, reinforcing and reproducing differences in power and progress for those from a lower socioeconomic class and essentially assimilationist in political ideology.

Dual Language Bilingual Education

Dual Language bilingual education is a predominantly US model that has developed and spread since 1963 to the present and has a high-quality research foundation to demonstrate its success. The basic approach is to attempt to have a reasonably balanced number of minority language speakers (e.g., Spanish) and majority language speakers (e.g., English) in each class; both languages are used for around 50 % of instruction time, though variations include programs with 60 % of instruction in the minority language and 40 % in the majority language (60:40) and other configurations (e.g., 80:20, 90:10). In each period of instruction, one language is used; language is primarily learned through content rather than specific language lessons; and among the intended outcomes are relatively balanced bilingualism, biliteracy, performance across the curriculum that is at least equal to monolingual mainstream education, and positive intercultural attitudes and behaviors (Lindholm-Leary 2001).

A traditional feature of Dual Language bilingual programs is language separation. Language boundaries are often established in terms of: time (e.g., learning through each language on alternative days or in different lessons); curriculum content (e.g., Mathematics in English and Social Studies in Spanish or varied according to the "language day"); and teacher (e.g., one uses Spanish only and another English only). In reality, children tend to use both languages spontaneously and pragmatically. This

has been called “translanguaging” with considerable international interest in the concept (Garcia 2009; Baker 2011). Translanguaging among children maximizes their linguistic and cognitive resources such that language compartmentalization in Dual Language bilingual education may need to be decreasingly emphasized.

Bilingual and Multilingual Education in Major International Languages

The use of major international languages in education has within the last decade or two become increasingly popular among parents, educators, and policymakers. In Singapore, Luxembourg, Japan, China, Brunei, Taiwan, Germany, and Kazakhstan, to name just a few countries, there has been a recent growth in this type of bilingual and multilingual education. In the context of growing globalization, internationalism, global trade, multinational corporations, and transnational employment, many parents and their children have a strong desire to capitalize on the cognitive, social, and economic benefits bilingualism and multilingualism in a major international language may provide. In this context, international schools have blossomed, with over 5000 schools in over 230 countries. While many use just English for curriculum transmission, others use two or more major languages. Prestigious schools at the primary and secondary levels are mainly private, target the more affluent social classes, and enjoy a growing reputation for excellence, including producing bilinguals and multilinguals.

With a prestigious clientele, a high reputation has been accorded to the European Schools movement. Such schools are typically more multilingual than international schools, and particularly cater for over 20,000 children from different European Community nations. Such schools have up to 11 different language sections reflecting the first language of their students. Younger children use their home language as the medium of learning but also receive second language instruction in the primary years. Older children take their instruction partly through their home language but also through the medium of a “vehicular” (working) language that is typically English, French, or German.

Trilingual and multilingual educations have recently been growing. For example, in the Basque Country, a recent interest has been in Basque, Spanish, and English being used in schools, with positive outcomes in achievement. In Luxembourg, children become trilingual through schooling starting their formal education at the age of five through the medium of Luxembourgish, with German then introduced as a main teaching medium, such that students function in much of the curriculum in German by the end of grade six. French is introduced as a subject in grade two and increasingly used as a teaching medium in secondary education. Thus the model is to emphasize learning through Luxembourgish in the early years, then through German in the primary school, and eventually also French, with trilingualism as a successful outcome. In China, India, Uruguay, Argentina, and more multilingual countries, efforts are made in some schools for students to develop and learn through the medium of regional, national, and international languages. For example, for some

children from the Dong ethnic group in southern China, instruction in local schools is provided through the medium of the regional (Dong), national (Mandarin), and international languages (English) (Feng and Adamson 2015).

Finally under this heading comes the European “Content and Language Integrated Learning” (CLIL) – a relatively generic term suggesting that at least some content areas are taught in a target “nonnative” language, but actual practices vary widely (Cenoz et al. 2014). Such practices include a Canadian total immersion approach, a pattern closest to Dual Language bilingual education, but also, at the other end of the spectrum, minimal content learning through a second language. CLIL needs to be understood as rooted in Europeanization as a political ideology and the vision of a multilingual Europe with growing communication in trade between European countries as part of its *raison d’être*.

Bilingual Education for Deaf Students

Many Deaf individuals are bilingual in a sign language (e.g., American Sign Language) and the written variety of the language spoken by non-deaf people (e.g., Standard American English). Their need for bilingualism is great given that most Deaf children are born to hearing parents, and most Deaf parents have hearing children who develop sign language as their “native” language (Reagan 2015). Historically, Deaf students were often mainstreamed, with no sign language support, and often perceived as having not only an auditory “problem” but were also seen as “remedial,” even “retarded,” thus leading to feelings of isolation and disempowerment (Baker 2011). Other approaches in the past focused on oralism (e.g., lip reading, speaking), with great debate over the appropriate role (if any) for sign languages.

In contrast, bilingual education programs for Deaf students enable them to be first taught through sign with varying emphasis on oracy and/or literacy in the majority language but with bilingualism as an outcome. Stephen Nover, an expert on bilingual Deaf education from Gallaudet University, “argues that the order of significance and emphasis of these three kinds of language skill must, in the case of the deaf child, be signacy, literacy and oracy (i.e., S-L-O), rather than the more traditional focus on oracy, literacy and then (if at all) something akin to signacy (i.e., O-L-S)” (Reagan 2015). Also, effective bilingual programs help students develop a positive Deaf identity – not as students with a deficit but as members of the Deaf community with its own distinct culture and ways of using language. The outcome may be increased pride in confidence in Deaf culture and its communities, raise self-esteem and self-identity, and improved school performance.

Bilingual Special Education

A distinction needs to be made between normally developing bilingual children wrongly ascribed as having learning problems and bilingual children with legitimate

learning disabilities (e.g., autism, dyslexia, cognitive disorders). In the United States, for example, there are problems with both overrepresentation and underrepresentation of bilingual children placed in special education due to ignorance, lack of observation, fear of legal repercussions for misplacement, and misuse of assessments designed for monolingual English speakers (Wright 2015). Proper identification and placement in special education requires teams of educators with expertise in both bilingual language development and learning disabilities who consider a wide range of linguistic, cultural, and development factors using screening tools and assessments appropriate for bilingual students (Hamayan et al. 2013).

Bilingual students with genuine learning disabilities should be placed in the “least restrictive environment” depending on the severity of their disability. Past trends focused more on placing students in separate special education classrooms, while current preferences for “full inclusion” emphasize the integration of as many students as possible and appropriate into regular classrooms with specialized support for the student and classroom teacher. Such specialized classrooms and supports, however, do not need to be provided solely in the dominant language. Full inclusion can take place in bilingual classrooms, and instruction and supports provided in a special education classroom can be provided bilingually (Beam-Conroy and McHatton 2015). Indeed, allowing students who receive special education services to develop and draw upon all of their linguistic resources may provide the greatest opportunities for effective learning.

Gifted and Talented Bilingual Education

Bilinguals and multilinguals with exceptionally high abilities are rarely mentioned in the academic literature on bilingual education (Valdés 2003 is an exception) or in educational research and writing on the gifted and talented in general. In practice, there are few examples of bilingual education for gifted and talented students in the USA (e.g., in Milwaukee, New York City, and San Antonio). Despite the literature on bilingualism and cognition indicating that bilinguals share cognitive giftedness in, for example, metalinguistic abilities, creative thinking, and sensitivity to communication, such talents have rarely been examined in the school setting. However, in recognition of these talents, Anatoliy V. Kharkhurin (2012, 2015) has proposed a framework for bilingual creative education which “constitutes a unified teaching model that introduces both language learning and creativity-fostering instructions to the school curriculum” and which “rests on a four-criterion construct of creativity that includes novelty, utility, aesthetics and authenticity.” Bilingual students tend to be grossly underrepresented in gifted and talented (GT) education for many of the same reasons described above for special education. In addition, when bilingual students are included, there are often efforts to “change or reconfigure” them to resemble white GT students (Beam-Conroy and McHatton 2015). While some states in the USA require that students screened for GT be assessed either in the language(s)

they understand or nonverbally, in reality there are few linguistically and culturally appropriate measures available for bilingual students (Beam-Conroy and McHatton 2015). Nonetheless, GT programs can and should be conducted bilingually for bilingual students of high ability, and traditional bilingual education programs can also provide the same types of enrichment lessons and activities featured in GT programs, even without the official “GT” label.

Problems and Difficulties

Several problems and difficulties associated with specific models and student populations have been outlined above. An additional challenge is determining the effectiveness of each program and identifying the most effective programs. Overall, research ranging from evaluation studies, comparative analyses, and meta-analyses have generally found that bilingual approaches are superior to monolingual approaches and that longer-term programs aiming for bilingualism and biliteracy have more positive linguistic and academic outcomes for students than do short-term (i.e., transitional) program models (for a review see Baker 2011; Wright 2015). Such research is often valuable in persuading parents about bilingual education, yet politicians tend to prefer their preconceptions rather than research findings. In such studies, however, program effectiveness is defined by a relatively small range of curriculum outcomes. Performance in one or two languages has been the basic outcome measure, with core curriculum areas often added (e.g., mathematics), but outcomes such as self-esteem, social integration, and employment are rarely considered. Products have been investigated rather than processes in classrooms.

The whole notion of a “program model” is now being challenged as problematic out of concern that they represent a monolingual/monoglossic perspective in which the languages of bilingual students are treated as two separate distinct systems, as if students are two monolinguals in one and placed in programs where languages are simply subtracted or added (Flores and Beardsmore 2015; García 2009). In contrast, these and other scholars advocate for a multilingual/hetereoglossic perspective that views the languages of bilinguals as dynamic and coexisting. Such a perspective opens up space to engage with optimal classroom Dual Language or translanguaging practices that maximize growth and gains for individual students, as well as positive outcomes for schools in an accountability era (Celice and Seltzer 2013; Lewis et al. 2012a). We thus seem to be witnessing a historical change from effective *models* to effective *practices*, although the latter is built upon the former, and space can be made within existing program models for multilingual/hetereoglossic perspectives and effective translanguaging practices. Some effective practices may be similar across models, making pedagogic decisions more universally informed rather than just from within a model. We thus conclude this chapter with a brief exploration of some key modern concepts in effective practices in bilingual and multilingual education that must be considered as we move forward.

Future Directions

School-Level Concepts of Effectiveness

While there are a multitude of school-level elements to effectiveness in bilingual schooling, three important concepts will be considered here. *First*, a foundation element is the recruitment, selection, and retention of highly effective staff. Among the attributes of staff needed are: language proficiency in one or more languages; positive attitudes to bilingualism, multilingualism, biculturalism, and multiculturalism; positive attitudes to minority languages, minority students, and to bilingual education; being inclusive yet seeking an individualized and child-centered curriculum for each student; being engaged in continued professional development; being sensitive to home and community contexts, and working with parents as partners; and not least an enthusiasm and commitment to bilingual schooling. Research on school effectiveness has revealed that leadership is highly important. Principals, headteachers, and other senior staff can encourage high expectations among staff and students, show strength of purpose and direction, be motivating and innovating, work in partnership with community leaders, and empower all staff in decision-making processes and in an enthusiastic bilingual and bicultural mission of the school.

Second, an effective bilingual school is typically dedicated to: achieving high standards of literacy, biliteracy, and multiliteracies to aid learning across the curriculum and engendering the pleasure of reading and writing in two or more languages for multiple purposes; preparing an empowered citizenship; and gaining employment for all its students. Particularly where there are minority languages, the varied use of literacies in the home and community, in religion and neighborhood, to include visual, audio, and gestural elements to literacy, may need to be encouraged.

Learning to read and write in a second language can be achieved simultaneously or sequentially. In Dual Language bilingual education, the simultaneous acquisition of biliteracy tends to successfully occur. In contrast, in Canadian immersion education, children tend to learn literacy in French before English, and this also results in considerable success. What occurs in both models is relatively easy transfer from one language to another. Though vocabulary, grammar, and orthography may be different, generalizable skills in decoding and specific reading strategies (e.g., contextual guessing of words, scanning, and skimming) transfer easily from reading one language to another. When two languages have different writing systems (e.g., English, Arabic), there is still some transfer from the first to a second language (e.g., knowledge of text structure, sensorimotor skills, attitudes to writing) (Koda and Zehler 2008).

Third, parents, siblings, and the local community are typically important in students' educational development. Students may move between reading sacred religious texts in one language (e.g., Arabic), to speaking in the family and neighborhood in a different language (e.g., Urdu), and then using English in school (Guo 2014). The literacy and language practices of the family and religion may be different from the school, thus needing teachers to have a sympathetic understanding

of out-of-school uses of different languages and literacies but also regarding parents as partners and working for mutually agreed outcomes. Parents have “funds of knowledge,” stored wisdom in their histories and traditions, while schools transmit an agreed curriculum. At its best, both parents and teachers understand that education is not the same as schooling, and both the school and the home are educators. Also, home-school cooperation, family engagement and parental leadership in the school, and a family’s understanding of the school’s bilingual mission can empower students and the school itself (Arias 2015).

Classroom-Level Language Distribution Concepts

Decisions need to be taken for every bilingual classroom regarding how two or more languages will be used by the teacher, between teacher and students as groups and individually, and preferences in informal student exchanges although this may not be easily controlled. For example, what language(s) will be used for Mathematics and Science compared with Social Studies/History/Geography? Will both languages be used for each curriculum area or just one for each specific curriculum activity? Will languages be kept separate as strictly as is possible? For example, will one day be allocated to instruction through Spanish and another day for instruction through English? Or will teachers and students switch between languages in either a formally encouraged manner or serendipitously? Will there be a difference across grades and ages in language distribution decisions? Will more emphasis be given to the minority language in the early grades, with more emphasis on the majority language in later grades? What happens if a child enters the classroom not speaking a standard variety of either of the languages? At what age and grade is a third language introduced? Historically, language distribution decisions tended to reflect separation of languages rather than concurrent usage.

Language distribution decisions also relate to specific content preferences of politicians, public, parents, and pedagogues. The best example is the language of instruction for Science and Mathematics, where some have argued that this should be through the medium of the majority language, particularly English, partly if the other language lacks scientific terminology, partly as University education in Science is often through English or another majority language, and partly because most scientific textbooks and electronic information will often mostly be in the country’s majority language. In opposition, the argument has been that a language will lose prestige and status when it is not used for all curricula areas, including Science and Mathematics. Thus, some minority languages (e.g., Basque, Welsh) have developed terminology to cover all aspects of the curriculum including Science.

Even when there is a clear language distribution strategy in a bilingual classroom, students will often be heard code switching (e.g., between Cantonese and English in Hong Kong). This typically reflects local contexts and traditions, with teachers as well as students code switching frequently. This is sometimes for specific purposes such as encouragement, individualized feedback, reprimands, and not least to aid explanation and understanding among students. While Dual Language and

immersion approaches may seek separation of languages, classroom talk, in reality, often utilizes both languages. Students and teachers may be exploiting the availability of both languages to maximize learning. Even when code switching is discouraged, students may find that they best express themselves by code switching. If other students and the teacher understand both languages, communication and understanding are increased for the benefit of all.

Recognition of this reality in classrooms is one of the elements of a relatively new concept called translanguaging. The strategic use of “translanguaging” derives from schools in North Wales in the 1980s (Lewis et al. 2012b). Two educationalists (Cen Williams and Dafydd Whittall) believed that increased competency in two languages and deeper learning would occur if the language of input in a classroom lesson was in one language and the output in another language. For example, children may do their reading in English from a textbook, worksheet, or the Internet and then complete a written assignment (or an oral presentation) through Welsh. They argued that this will produce a deeper and fuller understanding of the subject matter, develop oracy and literacy in both languages, and better integrate language learning with content learning, as well as integrate children with different home languages in classroom activity.

Ofelia García (2009) suggests that in New York classrooms, a looser form of translanguaging is often prevalent. Students systematically, strategically, and sensibly use both languages to maximize understanding, communication, and performance. Students did not have clear-cut boundaries between their languages but functional integration. This led her to believe that teachers can maximize learning by encouraging children to use both of their languages without compartmentalization or boundaries, allowing students to define and maximize use of their two language repertoires and their language preferences in classroom activity (see Celic and Seltzer 2013).

Translanguaging requires some degree of competency in both languages, though the level of competency is rarely equal in both languages. When one of their languages is less well developed in emergent bilinguals, an important dimension in effective bilingual classrooms is the scaffolding of language. Scaffolding refers to language support that children need in the classroom when they cannot easily operate in the majority language of that classroom. Scaffolding includes use of gestures, visual aids, and repeating something in a simpler way, using concrete examples and simpler vocabulary to enable an “emergent bilingual” to understand a lesson (Walqui and van Lier 2010).

Student-Level Concepts

Effective bilingual education for students involves numerous complex and interacting list of concepts and considerations. The many very effective and high-performing bilingual schools in many countries attest that there is now sufficient evidence to ensure success. In this section, three important issues are considered to exemplify student-level considerations to promote success.

First, scholars involved in Dual Language bilingual education in the United States have debated the optimal balance of students from different language backgrounds in each classroom. In theory, in a 50/50 model half the students come from English speaking homes and half come from homes where the target non-English language is spoken, and each language is used 50 % of the time. However, in practice, the higher status language – English – tends to dominate and be more highly valued (Valdés 1997). In the USA and around the world, another challenge is when children who speak neither of the languages of the local children are placed in bilingual classrooms (e.g., Eastern European immigrants in Ireland placed in Irish/English bilingual classrooms). Another challenge is when students speak three or more languages at home or there are multiple home languages in a single classroom as is common in many urban centers around the world that attract immigrants, refugees, and international workers. Bilingual educators must consider ways to value students learning new languages (including third or fourth languages) such as with school-wide activities that celebrate multilingualism and multiculturalism. The language balance of the classroom is important if bilingualism is to be achieved and hence is an important topic in individual and group student considerations.

Assessment of bilingual students, especially those not yet proficient in the dominant societal language used for testing, is another widely debated consideration. For example, in English-dominant countries, when assessment and testing in school is only or mostly available in English, then accommodations are essential for students who have not yet obtained sufficient proficiency to obtain meaningful results. Examples include testing in the home language, oral interpretation of instructions and/or test items, simplified English for instructions and test items, allowing use of a bilingual dictionary, and more time to complete a test. Such accommodations attempt to make the test more valid and reliable for bilingual children and enable them to demonstrate their true ability. However, the research literature on such accommodations is too small to drive effective policy and practice (Wright 2015).

Finally, one of the most important considerations, not only for the future of bilingual education but also for the future of each bilingual child, is identifying the desired outcomes from bilingual education. The expectation is that the child becomes competent in two or more languages. Above that baseline, helping students become bicultural, biliterate citizens who value linguistic diversity is highly desirable. For a bilingual school, the success of its students on assessments, in graduating from secondary school, and getting into university is essential for its status, image, and attractiveness to future parents. Less attention has been given to success in the job market. Where there is a customer interface needing bilingualism or multilingualism, in multilingual economies and multinational companies and in many forms of employment where communication is important, bilingual students are increasingly of more value.

There are also other potential gains from bilingual education: the higher self-esteem of children who otherwise would have experienced monolingual mainstream education; the higher self-esteem of students who can operate in two or more different language communities; and the cognitive, communication, cultural, and

character advantages that research has located for bilinguals. No outcomes can be assured, but bilingual education appears increasingly to have multiple positive outcomes for education systems, schools, classrooms, and not least, for students.

Cross-References

- ▶ [Bilingual Education in Canada](#)
- ▶ [Indigenous Bilingual and Revitalization-Immersion Education in Canada and the USA](#)
- ▶ [Sign Bilingualism in Deaf Education](#)
- ▶ [Translanguaging in Bilingual Education](#)

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Bilingual Education: What the Research Tells Us

Stephen May

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Abstract

This chapter explores key research findings about bilingual education and the related efficacy of various approaches to teaching bilingual students. Its principal focus is on the research to date on the most common forms of bilingual education. This research consistently supports the efficacy of bilingual education, particularly when it is predicated on additive bilingual principles. Even so, ongoing public opposition to bilingual education, often highly misinformed, remains strong. The chapter also examines recent research around the notions of “dynamic bilingualism” and “translanguaging,” along with their pedagogical implications for existing bilingual programs.

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Additive bilingualism • Biliteracy • Bilingual programs • Dynamic bilingualism • Enrichment bilingual programs • Heritage/indigenous programs • Immersion programs • Linguistic interdependence • Maintenance bilingual programs • Subtractive bilingualism • Transitional bilingual programs

Introduction

This chapter explores key research findings about bilingual education and the related efficacy of various approaches to teaching bilingual students. Its principal focus is on the research to date on the most common forms of bilingual education. When this research is examined, and taken seriously, a picture of what constitutes an effective educational approach for bilingual students can be clearly ascertained. However, this clarity is still not yet reflected in wider public and policy debates where strongly polarized positions both for and (more often) against bilingual education remain commonplace.

A key reason as to why wider public and policy debates on bilingual education continue to be so contested rests with the widely different understandings among commentators of what such an education actually comprises. At one end of the continuum are those who would classify as bilingual *any* educational approach adopted for, or directed at, bilingual students, *irrespective* of their educational aims (fostering bilingualism or monolingualism) or the role (if any) of first language (L1) and second language (L2) as languages of instruction. In other words, simply the presence of bilingual students in the classroom is deemed sufficient to classify a program as bilingual (see, e.g., Baker and de Kanter 1981). At the other end of the continuum are those who distinguish clearly between nonbilingual, weak, and strong bilingual programs (e.g., Baker 2011; Cummins 2010; May 2010; Skutnabb-Kangas 1981, 2000). It is the latter approach that I will adopt in this analysis.

Early Developments**Philosophy/Aims of Bilingual Education**

There are a plethora of existing bilingual education typologies in the research literature, although, as one might expect, they do not always correspond or overlap, depending on the initial starting point and position of the researcher. Some of the most accessible and informed can be found in Cummins (2010), Genesee et al. (2006), Hornberger (1991), May (2010), May et al. (2004), and Skutnabb-Kangas (2000). For the most recent comprehensive overviews, see Baker (2011), García (2009a), and May and Dam (2014).

Before unpacking the characteristics of bilingual education further in light of these typologies, however, it is useful to begin with a classic definition of bilingual education, first posited by Andersson and Boyer:

Bilingual education is instruction in *two languages* [emphasis in original] and the use of those two languages as mediums of instruction for any part or, or all, of the school curriculum. (1970, p. 12)

Put simply, bilingual education involves instruction *in* two languages (see also Baker and Prys Jones 1998; Cummins 2010; Freeman 1998; Hamers and Blanc 2000). This immediately excludes programs that include bilingual students but which do not involve bilingual instruction, most notably submersion majority language programs, where students are taught only in the majority language, irrespective of their language background. It also excludes programs where an L2 is taught as a subject only. English as a second language (ESL) classes, which include the sheltered instruction approach increasingly popular in the USA, are examples of this, as are foreign language classes. Along with submersion programs, they can also clearly be described as nonbilingual programs.

For a program to be deemed to be bilingual, the key is that both languages must be used as media of instruction and thus to deliver curriculum content. As Baker and Prys-Jones (1998, p. 466) conclude: “If there is a useful demarcation, then bilingual education may be said to start when more than one language is used to teach content (e.g., Science, Mathematics, Social Sciences, or Humanities) rather than just being taught as a subject by itself.” On this basis, immersion models that teach majority language students predominantly through a minority or “target” language, such as French-immersion programs in Canada or Māori-immersion programs in New Zealand, are also clearly bilingual programs. This is because some curricular instruction in the majority language (English, in both cases) almost always occurs at some point prior to the end of the program, even in those programs with very high levels of immersion in the minority or target language.

An additional key point addressed by many commentators in defining bilingual education relates to the constituency of students each program serves, along with the *philosophy* and related educational *goals* of any given program. Within the literature on bilingual education, these have most often been described in terms of dichotomies, most notably those between “elective bilinguals” and “circumstantial bilinguals” on the one hand and between “additive bilingualism” and “subtractive bilingualism” on the other. Elective bilinguals are those who *choose* to learn an additional language, usually as a means of social and educational advancement. The context of such acquisition is also often described as additive bilingualism in that the process of bilingual acquisition and learning is seen as socially, cognitively, and educationally beneficial, both by the learners themselves and in the wider society. An example of this might be the English-speaking student who decides to undertake French-immersion education in Canada, with the end result that they will be bilingual in English and French. In contrast, circumstantial bilinguals are those who are *required* to learn another language, most often because their first language

(L1) is not the language of the wider society in which they currently live. These circumstantial bilinguals, the majority of whom are immigrants or speakers of minority languages, often subsequently experience “subtractive bilingualism.” Subtractive bilingualism occurs when the ongoing use of a person’s L1 is seen as “harmful” to the “successful” acquisition and use of the dominant or majority second language (L2) at the individual level, while the maintenance of the L1 is seen as problematic at the wider societal level. In both instances, a majority L2, or the language of the wider society, is seen as being in competition with, and eventually replacing, the L1 of minority language speakers. In the process, their bilingualism is problematized, even pathologized, both individually and societally. An example would be Latino students in the USA whose ongoing bilingualism is often viewed negatively, with Spanish seen as “interfering” with the acquisition of English, while ongoing use of Spanish is seen as a failure to integrate sufficiently into US society (see, e.g., Crawford 2008; González 2012).

The additive–subtractive distinction, first postulated by Lambert in Canada in 1974, is also useful for another reason. Research over the last 40 years has consistently demonstrated that those programs which are most likely to achieve bilingualism and biliteracy for their students – i.e., additive bilingual programs – are also the most likely to see those students succeed educationally. In contrast, subtractive programs not only atrophy their students’ existing bilingualism but also exhibit far lower levels of educational success for these students, particularly over time (see Baker 2011; Cummins 2000; Genesee et al. 2006; May et al. 2004; Thomas and Collier 2002; see also below).

To this additive–subtractive dyadic, however, we need to add García’s (2009a) important additional notion of “dynamic bilingualism.” Dynamic bilingualism highlights the complex and evolving language use of bilinguals in the increasingly globalized world of the twenty-first century. This allows for the possibility of moving beyond the somewhat arbitrary L1/L2 distinction (itself, increasingly questioned as a monolingual conception of language learning; see May 2014a). Instead, bilingual learners/learning are conceived in terms of a bilingual continuum, ranging from emergent bilinguals through to highly proficient bilinguals (García 2009a). A key aspect of this dynamic bilingualism is what García, following Cen Williams, terms “translanguaging” (see García 2009a, b), which refers to the multiple and complex discourse practices in which bilinguals engage every day in order to facilitate communication with others and to comprehend their bilingual worlds. It is thus increasingly accepted that, while additive bilingualism remains useful in foregrounding the positive potential of bilingualism and bilingual education (along with its wider societal implications), dynamic bilingualism better describes the actual complexities of ongoing bilingual language use. Nancy Hornberger’s important notion of “continua of biliteracy” (see Hornberger 2003) similarly highlights the complex interface between bilingualism and biliteracy in any given bilingual learner.

In what follows, I continue to discuss the additive–subtractive bilingual distinction as a central explanatory framework for evaluating the aims and philosophy of bilingual education and related attitudes towards bilingualism and bilingual learners. That said, the notions of dynamic bilingualism and translanguaging necessarily

complexify the phenomenon of bilingualism itself, along with its development in bilingual learners, and related learning approaches, an issue I will return to in the final section on future directions in this field.

Models of Bilingual Education

The next level of classification of bilingual programs can now be made in terms of the specific linguistic and/or educational aims of particular bilingual education *models*. According to Freeman (1998, p. 3), models are defined in terms of “their language-planning goals and ideological orientations toward linguistic and cultural diversity in society.” They can be understood as broad categories that help us to understand on a very general level what bilingual education means, although there is inevitably a degree of arbitrariness in distinguishing among them.

Despite the welter of different classifications of bilingual education in the research literature, there are three broad models that are consistently included in these various typologies. These are: *transitional* models, *maintenance* models, and *enrichment* models of bilingual education. In addition to these three broad models, there are also what have come to be known as *heritage* language models, which fall somewhere in-between maintenance and enrichment approaches (May and Hill 2005; see below).

A *transitional* model of bilingual education uses the L1 of minority language students in the early stages of schooling but aims to shift students away from the use of their L1 as quickly as possible towards the greater use of the majority (L2) language, in order to “cope” academically in “mainstream” or general education (Freeman 1998; de Mejia 2002). In other words, the L1 is used only to the extent that it facilitates the transition of the minority language (L1) speaker to the majority language (L2). Accordingly, most transitional programs are also early-exit programs, where the L1 is used for only 1–2 years before being replaced by the L2, and can thus be regarded as both a subtractive and a weak bilingual model. In assuming that the (minority) L1 will eventually be replaced by a (majority) L2, bilingualism is not in itself regarded as necessarily beneficial, either to the individual or to society as a whole. This in turn suggests that the eventual atrophy of minority languages, or the aim of moving eventually *from* bilingualism *to* monolingualism in the majority language, remains a central objective of transitional bilingual programs. For example, transitional bilingual programs were developed widely in the USA for Spanish (L1) speakers from the 1970s and, while in decline since the 1990s, still remain common in some states (e.g., Texas) (Crawford 2008; Cummins 2010).

A *maintenance* approach to bilingual education, on the other hand, differs fundamentally from a transitional approach because it aims to *maintain* the minority language of the student, *strengthen* the student’s sense of cultural and linguistic identity, and *affirm* their individual and collective ethnolinguistic rights. As such, it is clearly an additive and strong bilingual model. There are many types of bilingual program that can be said to fit into this model and these will be discussed more fully below. However, the typical participant in a maintenance bilingual program will be a national minority group member (e.g., Welsh in Britain, Catalan in Spain, French

Canadian in Canada, Latinos in the USA) whose L1 is already developed to an age-appropriate level (although they do not need to be literate yet in the language). The language of instruction of the program will either be predominantly in the L1 or, if both L1 and L2 are used as mediums of instruction, at least 50 % in the L1. This is because the aim of such programs, as their designation suggests, is to maintain the L1 for a sufficient amount of time for academic language proficiency in the L1 to be achieved. This, in turn, facilitates the acquisition of literacy in an L2, on the basis of what Cummins (1979, 2000; see also Koda 2007) has termed the “linguistic interdependence” principle. Consequently, the most common programs in a maintenance bilingual model are late-exit programs – that is the use of L1 as an instructional language continues *for at least* 4–6 years, often longer.

Closely related to maintenance bilingual programs are *enrichment* programs, a term first coined by Fishman (1976). If the former are geared towards maintaining the L1 of minority language students, the latter are generally (but not exclusively) associated with teaching majority language students (such as L1 English speakers) *through* a minority target language. French immersion in Canada, where many of the students come from middle-class, L1 English-speaking homes, is perhaps the most often cited example of an enrichment bilingual program. Welsh-medium schools, which also include many middle-class L1 English speakers, are another example. Elite bilingual programs such as the European schools movement are also widely regarded as enrichment programs (see Baetens Beardsmore 1993; de Meija 2002).

As with maintenance programs, the emphasis in enrichment programs is not just on achieving bilingualism and biliteracy for individual students but also on the ongoing maintenance of the minority language(s) in the wider community. As Hornberger argues, the enrichment model “encompasses all those bilingual education program types which aim toward, not only maintenance, but development and extension of the minority languages, cultural pluralism, and an integrated national society based on autonomy of cultural groups” (1991, p. 222). Accordingly, Hornberger asserts that this type of program has the greatest potential to educate students successfully, given its strong additive bilingual basis. It is also the program most likely to reduce the educational and wider social and linguistic inequalities experienced by minority language speakers.

This broad L1/L2 distinction between maintenance and enrichment approaches is a useful form of shorthand in the research literature but it also clearly has its limits – not least, because of the limitations of the L1/L2 distinction itself, signaled earlier. With respect to bilingual education programs, for example, it does not necessarily help us to identify clearly where a *heritage* language model of bilingual education might fit in. Heritage programs are most often associated with two distinct constituencies. The first comprise Indigenous language revitalization efforts, along with a wide range of related Indigenous language education initiatives. These include Māori-medium education in New Zealand; Navajo language education in the USA; Quechua/Quichua language education programs in Bolivia, Ecuador, and Peru; and Sámi language education in Norway, among many others (Baker 2011; Hinton and Hale 2001; Hornberger 2008; May and Hill 2005). Some of these Indigenous language programs are aimed at students who still speak the Indigenous

language as an L1 (e.g., Navajo; Hualapai in the USA; Inuit in Nunavut, Canada; Sámi in Finnmark, Norway) and may therefore be regarded as L1 maintenance bilingual programs. But many also cater for students with a mix of L1/L2 speakers of the language (Māori in New Zealand, Hawaiian), and some have only L2 speakers (or, rather, learners) of the language (the Master/Apprentice program developed for the now largely moribund Indigenous languages of California) and are therefore closer to the enrichment end of the continuum.¹

The second constituency comprises other established and immigrant groups (Valdés et al. 2006; Wiley 2001; Wiley et al. 2014). These latter programs tend to focus solely on the *reclamation* of a heritage language no longer spoken as an L1 – i.e., the students are L2 learners of the heritage language. In both cases, however, heritage programs can clearly be regarded as an additive and strong bilingual approach, albeit situated somewhere in between maintenance and enrichment models in terms of the L1/L2 status of their students (May 2010; May and Hill 2005). Even so, increasingly, the majority of students in such programs tend to be L2 speakers of the target language, the result, in turn, of previous patterns of language shift and loss of the heritage/Indigenous language. For example, McCarty (2002, 2012) notes that in the Navajo heritage language program at Rough Rock in Arizona – one of the strongest and longest established in the USA – less than 50 % of Navajo now speak their own language and their numbers are declining each year. And in Māori-medium education in New Zealand, the overwhelming majority of students are now L1 English speakers (Hill and May 2011, 2013; May and Hill 2005).

Bilingual Education Programs

The final level at which bilingual education can be examined is the *program* level, which is also, necessarily, the most complex and diffuse. According to Hornberger (1991), bilingual programs are more concrete categorizations than models and can be differentiated from one another by an analysis of specific contextual and structural characteristics. For Hornberger, contextual characteristics include: characteristics of the student population (numbers, stability/mobility in the school, SES, minority status, language background) and characteristics of the teacher population (ethnic background, degree of bilingualism, training, roles). Structural characteristics include: “program in school” (whether school-wide or targeted); “languages in curriculum” (sequencing, oral/literate development, and subject allocation of the languages); and “classroom language use” (patterns and functions).

There is not space in this chapter to discuss the complexity of programs involved here (for an exemplary extended analysis, see Baker 2011), except to highlight – in

¹Not all Indigenous communities accept heritage bilingual programs as an appropriate overarching term – as evident, most clearly, in the rejection of the term by many First Nations peoples in Canada (Cummins, personal communication).

light of the preceding discussion – the most common types of program. Nonbilingual programs include submersion, ESL, and sheltered instruction programs (all subtractive programs). Bilingual programs include weak (and subtractive) bilingual programs, such as transitional bilingual education, where use of the students' L1 is limited usually only to the first years of schooling. Strong (and additive) bilingual programs include L1 maintenance bilingual programs, immersion, and heritage programs. These programs have also been termed “one-way” programs (Thomas and Collier 2002) because they tend to have a preponderance of either L1 or L2 students within them, depending on the context. They may vary in terms of both their level of immersion in the minority or target language and the related timing and balance of instruction in the majority language. However, most of these programs will use the minority or target language as the medium of instruction between 50 % and 90 % of the time. For example, the program may begin as a 90:10 program in the early years (with 90 % in the minority or target language) and change gradually to a 50:50 program by year four of a student's schooling.

Increasingly popular in the USA with respect most often to Spanish–English bilingual instruction is “two-way immersion” or two-way dual language immersion. The aims of two-way immersion are the same as other strong, additive programs – bilingualism and biliteracy for their students. However, unlike other forms of immersion, two-way programs include L1 speakers as well as L2 speakers of the target or minority language in the same classroom, wherever possible, in roughly equal proportion. These programs specifically integrate L1 and L2 students in the target language (e.g., Spanish) so that the L1 target language students scaffold/support the L2 target learners, while the latter, in turn, scaffold/support the L1 target language learners in the majority language (e.g., English). The aim is thus to develop the bilingual and biliterate skills of both groups, drawing not only on the teacher's but also the students' language learning knowledge (Cloud et al. 2000; Howard et al. 2007; Lindholm-Leary 2001; Pérez 2003). Because of this, and the prominence of the mixed student groups, these programs are often associated by parents with the attributes of enrichment programs and the associated advantages of elective bilinguals. This perhaps explains their growing popularity, despite a wider political climate in the USA that is increasingly hostile to bilingual education (see below).

The discussion thus far can be summarized, albeit somewhat simplistically, via Diagram 1,² where the left-hand side can be equated with subtractive approaches and the right-hand side with additive approaches to bilingual students. As we shall see, addressing these various dimensions of bilingual education is a necessary but not sufficient prerequisite for understanding what research has subsequently found in relation to the relative efficacy of the various approaches just described. It is to this research that I now turn.

²This diagram was developed in conjunction with my colleague, Richard Hill and is loosely based on an earlier diagram by Hornberger (1991). It was previously published in May (2010).

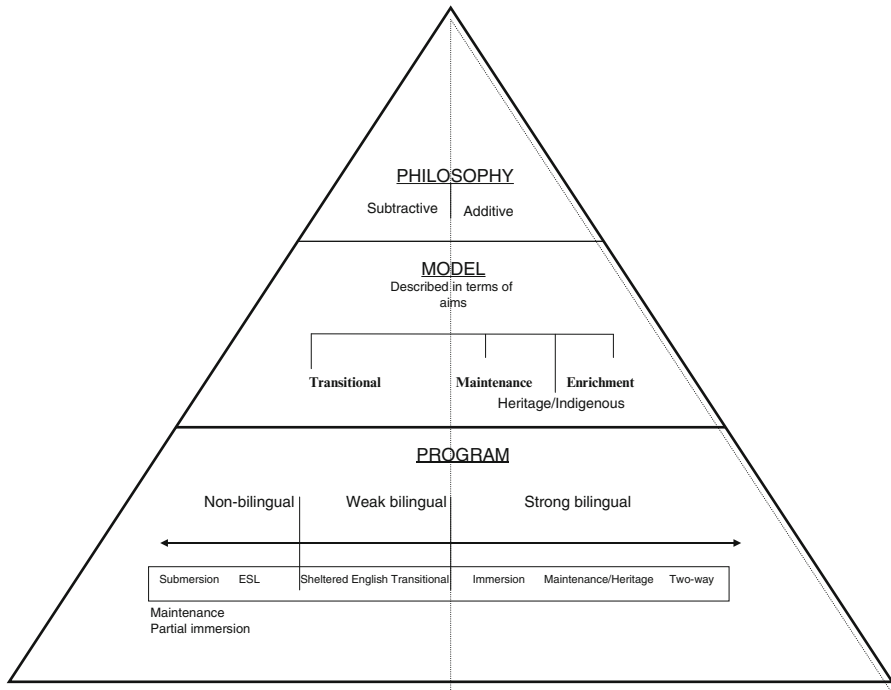


Diagram 1 Principal axes of bilingual/immersion education

Major Contributions

The complexity of the types of bilingual programs available, along with the widely different understandings of bilingual education adopted in the research literature, have significant implications for how one might proceed to assess fairly and accurately the effectiveness of such programs. This is crucial because the veracity of the research evidence gathered will, in turn, determine how informed subsequent educational policy and practice is likely to be on bilingual education. Accordingly, even where research is drawn upon as a basis for policy and practice it needs to be carefully examined and evaluated. For example, the recent dismantling of many bilingual education programs in the USA (see Crawford 2000, 2008; Cummins 2000; Dicker 2003; May 2014b, c) has largely been based on a highly effective antibilingual education campaign that promoted a combination of popular misunderstandings about bilingualism and highly selective, often directly misleading, “research evidence” to support its (erroneous) claims. The latter can be most clearly seen in the effective political mobilization by bilingual education opponents of two deeply flawed US government sponsored research studies which cast (some) doubt on the effectiveness of bilingual education.

The first of these, the American Institutes for Research's (AIR) evaluation of bilingual education programs, was commissioned in the 1970s by the United States Office of Education (Danoff et al. 1978). It provided an overview of US federally funded bilingual programs operating at the time and found that such programs had no significant impact on educational achievement in English, although they did enhance native-like proficiency. It furthermore suggested that pupils were being kept in bilingual programs longer than necessary, thus contributing to the segregation of such students from mainstream classes.

Despite concerns about its methodology (see below), the conclusions of the AIR study were seemingly replicated by a second piece of US federally commissioned research by Baker and de Kanter (1981, 1983; see also Rossell and Baker 1996). They reviewed the literature and likewise concluded that bilingual education was not advancing the English language skills and academic achievements of minority language students, predominantly Spanish-speaking L1 students. In short, Baker and de Kanter argued that students in bilingual programs demonstrated no clear educational advantages over those in English-only programs.

Given the increasingly skeptical political climate of the time, this research generated enormous publicity and exerted even more influence on subsequent federal US policy. However, as Crawford (1989) observes, while the Baker and de Kanter (1983) report is easily the most quoted US federal pronouncement on bilingual education, it is probably the most criticized as well. As with its predecessor, much of this criticism had to do with the methodology that was employed. For example, as with the AIR study, Baker and de Kanter specifically rejected the use of data gathered through students' L1. They also failed to account for the fact that two thirds of the comparison group in English-only education programs *had previously been in bilingual programs* where, presumably, they had benefited from first language instruction.

Moreover, neither report distinguished between the wide variety of educational approaches to bilingual education, particularly in relation to the degree to which the first language (L1) was used as the medium of instruction, and whether the programs were based on an additive or subtractive bilingual approach. By simply aggregating all results, these reports thus singularly failed to differentiate meaningfully between different bilingual education programs. We can see this, for example, in the related failure of both reports to differentiate between early- and late-exit bilingual programs in their analysis, the former being largely subtractive, the latter largely additive. Consequently, the somewhat lesser educational effectiveness of early-exit bilingual programs, which constituted the majority of the programs under review, inevitably subsumed the better educational results of the late-exit programs (Cummins 1996).

Overall, the inadequacy of Baker and de Kanter's findings has been confirmed by subsequent meta-analyses of their data. Willig (1985, 1987), for example, controlled for 183 variables that they had failed to take into account. She found, as a result, small to moderate differences in favor of bilingual education, even when these were predominantly early-exit programs. Willig's conclusions are also replicated in two subsequent major longitudinal bilingual education research studies in the USA, those of Ramírez et al. (1991) and Thomas and Collier (2002; see also 1997). By

specifically differentiating among the widely different approaches to bilingual education, and controlling for their variable effectiveness, the findings of each of these major studies (see also Hakuta et al. 2000) clearly and consistently support the efficacy of bilingual education in *additive bilingual* contexts.

Ramírez et al. (1991) compared English-only programs with early-exit (1–2 years) and late-exit (4–6 years) bilingual programs, following 2,352 Spanish-speaking students over 4 years. Their findings clearly demonstrated that the greatest growth in mathematics, English language skills, and English reading was among students in late-exit bilingual programs where students had been taught predominantly in Spanish (the students' L1) – equivalent to one-way maintenance bilingual programs. For example, students in two late-exit sites that continued L1 instruction through to grade 6 made significantly better academic progress than those who were transferred early into all-English instruction. Ramírez et al. conclude that:

Students who were provided with a substantial and consistent primary language development program learned mathematics, English language, and English reading skills as fast or faster than the norming population in this study. As their growth in these academic skills is atypical of disadvantaged youth, it provides support for the efficacy of primary language development facilitating the acquisition on English language skills. (1991, pp. 38–39)

In contrast, the Ramírez study also highlighted that minority language students who receive most of their education in English rather than their L1 are *more* likely to fall behind and drop out of school. In fact, it is important to note here that the English-only programs used for comparison in the Ramírez study were not typical to the extent that, while the teachers taught in English, they nonetheless understood Spanish. This suggests that, in the far more common situation where the teacher does not understand the students' L1, the trends described here are likely to be further accentuated.

In the largest longitudinal study conducted to date, Thomas and Collier (2002) came to broadly the same conclusions. Thomas and Collier analyzed the education services provided for over 210,000 language minority students in US public schools and the resulting long-term academic achievement of these students. They did so by examining in depth five urban and rural sites from throughout the USA over 5 years, from 1996 to 2001. The school bilingual program types examined within these contexts varied widely – they included full immersion programs in a minority language, dual-medium or two-way programs, where both a minority and a majority language (usually, Spanish and English) were used as mediums of instruction, transitional bilingual education programs, ESL (English as a second language) programs, and mainstream submersion (English-only) programs.

As with the Ramírez study, one of Thomas and Collier's principal research findings was that the most effective programs – “feature rich” programs as they called them – resulted in achievement gains for bilingual students that were above the level of their monolingual peers in mainstream classes. Another key conclusion was that these gains, in both L1 *and* L2, were most evident in those programs where the child's L1 was a language of instruction for an extended period of time. In other

words, Thomas and Collier found that *the strongest predictor of student achievement in L2 was the amount of formal L1 schooling they experienced*. As they state, “the strongest predictor of L2 student achievement is the amount of formal L1 schooling. The more L1 grade-level schooling, the higher L2 achievement” (2002, p. 7). Only one-way and two-way or dual immersion programs – strong bilingual programs in effect – achieved these results. As Thomas and Collier conclude:

[These] are the only programs we have found to date that assist students to fully reach the 50th percentile in both L1 and L2 in all subjects and to maintain that level of high achievement, or reach even higher levels through the end of schooling. The fewest dropouts come from these programs. (2002, p. 7)

As with Ramírez et al., Thomas and Collier also found that students in English submersion classes performed far less well than their peers in strong bilingual programs, as well as dropping out of school in greater numbers. Students in transitional bilingual programs demonstrated better academic performance over time but not to the same extent as strong bilingual programs. In both these major large-scale studies, then, length of L1 education turned out to be more influential than *any* other factor in predicting the educational success of bilingual students, *including* socioeconomic status.

These findings have been corroborated by more recent related research. August and Shanahan (2006), for example, in their major review of the literature on developing literacy for L2 learners, acknowledge directly the benefits of L1 oral proficiency and literacy as a basis for successfully achieving literacy in English for language minority students. A meta-analysis undertaken by McField and McField (2014) further confirms the consistent achievement advantages found for students in additive bilingual programs. Callahan and Gándara (2014) provide in-depth quantitative analyses in support of the positive links between bilingualism and subsequent social and economic mobility in the USA.

I have concentrated on the US-based research findings – at the risk of underemphasizing research in other contexts (although see below) – because they provide us with such a clear demonstration of research supporting the effectiveness of additive forms of bilingual education. The major longitudinal studies discussed here are particularly important in this regard. These findings are also significant, however, because they highlight the wider social and political forces often arraigned against the ongoing development of bilingual education and the willful manipulation, or ignoring, of related research that supports its clearly attested efficacy.

Of course, there are a wide range of studies from other national contexts that also broadly corroborate these findings in support of bilingual education – not least, the contributions in this volume. Of the wider, book-length, research-based literature, Baker (2011) and García (2009a) provide magisterial overviews of the field of bilingual education. Cummins (2000), May et al. (2004), and Genesee et al. (2006) provide useful overviews of the key research findings with respect to the academic success of students in bilingual programs. Baetens Beardsmore (1993) and de Mejia (2002) discuss various European models of bilingual education, while

more recent research examines and supports the efficacy of content and language integrated learning (CLIL) programs in Europe (see Cenoz et al. 2014), where particular content areas are taught through the medium of another language. Barnard and Glynn (2003) explore developments in bilingual education in New Zealand (see also May and Hill 2005). García et al. (2012), Johnson and Swain (1997), Jones and Ghuman (1995), and Tollefson and Tsui (2004) provide a wide range of international examples of effective bilingual and immersion education programs, while the *International Journal of Bilingual Education and Bilingualism*, 13(2), 2010 explores the interconnections between deafness and bilingual education. All these contributions add to the burgeoning international research literature confirming the efficacy of strong forms of bilingual education.

Work in Progress

The chapters in this volume clearly demonstrate the breadth of work currently being undertaken internationally in bilingual education. There are also a number of key journals where research findings on bilingual education are regularly published. These include, most prominently, the leading *International Journal of Bilingual Education and Bilingualism*, the *Journal of Multilingual and Multicultural Development*, the *International Multilingual Research Journal*, the primarily US-focused *Bilingual Research Journal* and, the most recent addition, the *Journal of Immersion and Content-based Education*.

Key websites that are worth exploring in relation to the bilingual education research discussed in this chapter include the websites of Wayne Thomas and Virginia Collier <http://www.thomasandcollier.com/and> James Crawford <http://www.languagepolicy.net/>. Also useful is the first comprehensive web-based resource specifically for teachers working with bilingual students, *Language Enhancing the Achievement of Pasifika* (LEAP). This was developed in New Zealand between 2004 and 2006 by a team led by the author in relation to working with Pasifika bilingual students in mainstream (English-medium) contexts. However, it draws extensively on best practice in bilingual/immersion education and the general principles can be applied to all bilingual students. It can be found at <http://leap.tki.org.nz/>. For website access to research on the links between bilingual education and deaf students, see also <http://www.fbarnes.camden.sch.uk/Resources/Bilingual-Education-Research-Resources/>.

Problems and Difficulties

The problems and difficulties associated with this area have already largely been discussed. They include the plethora of, sometimes conflicting, definitions of bilingual education, along with the often-markedly different positions taken upon the educational effectiveness of bilingual education. In this chapter, I have tried to

untangle this often-bewildering complex range of positions – highlighting, first, the clear educational differences among programs for bilingual students and, from that, providing a means by which those programs can be accurately assessed. When this is achieved, the research on the efficacy of bilingual education becomes much clearer – starkly clear in fact – with strong additive bilingual programs consistently outperforming other program options.

Conveying these research results to educational policy makers and the wider public – particularly in monolingual (often English-dominant) countries – remains, however, a significant challenge, particularly given ongoing misperceptions about, and often-vociferous opposition to, bilingual education. In this respect, an observation made by Thomas Ricento on the US context, made two decades ago, still largely applies: “the public debate (to the extent that there is one) [on bilingual education still] tends to focus on perceptions and not on facts” (1996, p. 142). Or as Fishman despairingly asks of the same context, “why are facts so useless in this discussion?” (1992, p. 167). This reminds us that in *any* discussion of bilingual education, we must not only address seriously the educational research underpinning it but also the ways in which this research is at times ignored, deployed, and misrepresented in wider debates, particularly by opponents of bilingual education. The examples from the USA discussed in this chapter highlight this clearly enough.

This raises in turn the question of the degree to which those who research and teach in the fields of bilingualism and bilingual education should also engage in wider public debate on these issues. While positions on the role of advocacy will inevitably vary, there is a growing consensus that those who research and teach in these fields should, where possible, act as public intellectuals on bilingualism and bilingual education as well. As McGroarty (2006) observes of this, for example, “[i]t is the job of [those] interested in policies that include attention to bilingualism to keep the value of bilingualism in the public consciousness, to continue to demonstrate that bilingual approaches to education are not only feasible but, in fact, actually exist.” (p. 5). Similarly, Dubetz and de Jong (2011) highlight the role and implications of advocacy for teachers in bilingual programs.

Future Directions

As well as making the educational efficacy of bilingual programs clearer to a wider policy and public audience, current research on bilingual education is increasingly turning to the implications of the “multilingual turn” (May 2014a) for the pedagogy and practice of approaches to bilingual education. For example, a key pedagogical consensus in the various approaches to bilingual education discussed in this chapter has been that languages of instruction should be kept separate, to the degree possible. However, the growing awareness of “translanguaging” among bilingual students and the potential linguistic resource that this might provide in, and for, the teaching and learning process has led researchers to increasingly question this maxim. Angel Lin (2013) highlights the implications of translanguaging in her recent review of three decades of research on the use of L1 in L2 classrooms (see also Lin 2006).

Cammarata and Tedick (2012) discuss how to balance the focus on content delivery alongside L2 language scaffolding in immersion contexts, particularly given the (more) fluid language use of bilingual students. García and Sylvan (2011) argue that rather than enforcing the need to use a particular language in a defined setting, teachers must allow students to develop their own awareness of language practices, in addition to that of their peers, as they are engaged in learning. Creese and Blackledge (2010) have also identified flexible pedagogies as an important and productive instructional strategy in teaching practices in bilingual education contexts in England.

Meanwhile, research on the most appropriate and effective forms of assessment in bilingual education remains largely nascent. This is a product, in turn, of the ongoing monolingual orientation of research in language testing worldwide, along with the agencies that administer such testing. The consequences of this are almost always deleterious for bilingual students, who are regularly assessed as if they were monolinguals in their L2 or target language (see, e.g., Extra et al. 2009; Menken 2008; Safford and Drury 2012; Shohamy 2006). Accordingly, González (2012) has recently proposed that assessment measures incorporate students' L1s for the purpose of coupling evaluation with academic ability across various subject matters, as well as ensuring that the cultural backgrounds of students are represented in classroom-based evaluations. Abedi (2004) likewise contends that the languages utilized in assessment must correspond with learners' principal language of instruction. Soltero-González et al. (2011) support the adoption of a "holistic bilingual view" (p. 72) by teachers in reviewing the writing of bilingual children. García (2009a) proposes a "translanguaging mode" to bilingual assessment, with this flexible assessment evaluating student proficiency in both (see also García and Flores 2014; Leung 2014).

It is clear, then, that assessment in bilingual education remains an area of ongoing development. Assessment measures must take into account the bilingual and biliterate "continua" of bilingual students/learners, as well as the integrated characteristics of their linguistic and content proficiency, if they are ever to reach their full linguistic and academic potential. Addressing these issues remains a challenge for a still predominantly monolingual assessment regime, although important recent work by Virginia Gathercole (2013a, b) provides an initial basis for a more holistic approach to the assessment of bilingual students going forward.

Finally, there is also a growing awareness among researchers in bilingual education of the need for more ethnographically based research studies of bilingual education – thus providing a basis of thick description for the more comparative and evaluative studies discussed here. To date, there have been surprisingly few extended ethnographic accounts along these lines. Hornberger (1988), exploring Quechua language education programs in Peru, was one of the first and is still one of the most influential. King (2001) has explored Quichua programs in the Ecuadorian Andes, while McCarty (2002) provides a fascinating ethnographic account of Navajo language education. May (1994) provides a critical ethnographic account of Richmond Road School in Auckland, New Zealand, which became internationally renowned for its critical approach to bilingualism and multiculturalism, while

Freeman (1998) provides a comparable ethnographic account of Oyster Adams Bilingual School in Washington DC. Both May and Freeman concentrate, in particular, on the program characteristics of these two schools. Heller (1999), in her ethnographic account of a bilingual francophone school in Canada, focuses more on students and their use of language as does, more recently, Paris's (2011) critical ethnographic account of students' language identities and use in an urban US school. There have also been a few accounts of bilingual/immersion schooling at the local or regional level, including de Courcy (2002) in relation to French/Chinese programs in Australia, Pérez (2003) in relation to two-way bilingual programs in San Antonio, Texas, and Freeman (2004) in relation to a range of community-based programs in Philadelphia.

These ethnographic accounts provide us with a useful starting point, but there is still much that can be done in unpacking, not only the characteristics and efficacy of particular bilingual education programs, as discussed in this chapter, but also the complex, lived experiences of all those involved in them.

Related Articles in the Encyclopedia of Language and Education

Stephen Nover, Timothy Reagan: [Language Planning and Policy in Deaf Education](#).

In Volume: Language Policy and Political Issues in Education

Jasone Cenoz: [Translanguaging as a Pedagogical Tool in Multilingual Education](#). In volume: Language Awareness and Multilingualism

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In volume: Literacies and Language Education

Tarja Nikula: [CLIL: A European Approach to Bilingual Education](#). In volume: Second and Foreign Language Education

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Part II

Language, Literacy, and Identity in Bilingual and Multilingual Education

Teaching for Transfer in Multilingual School Contexts

Jim Cummins

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Abstract

This chapter discusses the theoretical issues and empirical research relevant to instructional language use in bilingual and L2 teaching programs. In most contexts, language teaching is still largely based on monolingual instructional assumptions that view languages as separate and autonomous. Optimal instructional practice is frequently characterized as exclusive use of the target language with minimal or no reference to students' home or dominant language. In contrast to these common assumptions, there is overwhelming research evidence that languages interact in dynamic ways in the learning process and that literacy-related skills transfer across languages as learning progresses. When we free ourselves from monolingual instructional assumptions, a wide variety of opportunities emerge for developing students' L1 and L2 proficiencies by means of

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bilingual/multilingual instructional strategies that acknowledge the reality of, and strongly promote, cross-language transfer.

Keywords

American sign language • Bilingual instructional approaches • Code-switching • Cross-lingual interdependence • Dynamic systems theory • Monolingual instructional approaches • Multilingualism • Plurilingualism • Transfer across languages • Translanguaging

Introduction

During the past decade, a major gap has emerged between typical instructional practice in second language (L2) and bilingual teaching and the perspectives of researchers regarding optimal instructional practice. Language teaching is still largely based on monolingual instructional assumptions. In the case of teaching L2 as a subject, curriculum guidelines typically emphasize the desirability of maximizing instructional use of L2 and minimizing instructional use of students' home language (L1). In bilingual and L2 immersion programs, the "monolingual principle" (Howatt 1984) dictated that the bilingual student's two languages should be kept rigidly separate. Lambert (1984) expressed this assumption clearly in the context of Canadian French immersion programs:

No bilingual skills are required of the teacher, who plays the role of a monolingual in the target language ... and who never switches languages, reviews materials in the other language, or otherwise uses the child's native language in teacher-pupil interactions. In immersion programs, therefore, bilingualism is developed through two separate monolingual instructional routes. (p. 13)

This monolingual principle or "two solitudes" assumption (Cummins 2007) has increasingly been called into question in recent years on the basis of both theoretical and empirical considerations. In this chapter, I discuss the theoretical issues and empirical research relevant to instructional language use in bilingual and L2 teaching programs. This literature is definitive in refuting the monolingual principle and the legitimacy of instructional approaches based on that principle. When we free ourselves from monolingual instructional assumptions, a wide variety of opportunities emerge for developing students' L1 and L2 proficiencies by means of bilingual/multilingual instructional strategies that acknowledge the reality of, and strongly promote, cross-language transfer.

Fading Credibility of Monolingual Instructional Approaches

Changing perspectives regarding the nature of bi-/multilingualism and L1/L2 relationships in the instructional process are illustrated in the 2014 publication of two edited volumes focusing on "the multilingual turn" in language education (Conteh

and Meier 2014; May 2014). Prior to these publications, *TESOL Quarterly*, the major international journal focused on teaching English as an additional language, published a series of papers in two symposia focused on “Imagining Multilingual TESOL” (2009) and “Plurilingualism in TESOL” (2014) (Taylor 2009; Taylor and Snoddon 2013).

An immediate catalyst for this increased focus on “teaching through a multilingual lens” (Cummins 2014) was García’s (2009) book *Bilingual Education in the 21st Century: A Global Perspective* in which she elaborated on the construct of *translanguaging*. This construct was originally proposed in the Welsh context by Cen Williams (1996) to refer to the alternation of input and output mode in bilingual instruction. Thus, students may receive information through the medium of one language (e.g., Welsh) and then talk or write about this information through the medium of the other language (e.g., English) (Lewis et al. 2012).

García (2009) extended the notion of translanguaging to refer to the “*multiple discursive practices* in which bilinguals engage in order to *make sense of their bilingual worlds*” (p. 45) (emphasis original). This conception highlighted the fact that there are no clear-cut boundaries between the languages of multilingual individuals. The instructional implications include a shift away from a focus on teaching two separate autonomous linguistic systems to a more flexible set of arrangements that might include strategies such as students writing initially in their stronger language and using this as a stepping stone to writing in their weaker language (e.g., Fu 2009; Luk and Lin, 2014) or strategic use of code-switching by teachers and students, as well as a variety of other instructional strategies that focus on the affordances provided by students’ bilingualism (see, for example, Celic and Seltzer [2011] for a comprehensive compilation of translanguaging instructional strategies).

Although these recent developments have accelerated the fading credibility of monolingual instructional practices, the theoretical and empirical roots of this evolution go back much further.

Evolution of the Multilingual Turn

Theoretical Contributions

Two sets of theoretical contributions that predate recent discussions of translanguaging are discussed below. The first of these was the “linguistic interdependence” hypothesis that posited a common underlying proficiency that made possible cross-linguistic transfer. The second involved the elaboration of a dynamic systems view of multilingualism (e.g., Herdina and Jessner 2002), which drew on Cook’s (1995) articulation of the notion of “multicompetence” (Cook 1995) and Grosjean’s (1989) discussion of the very different mental structures that distinguish bilinguals from monolinguals.

Linguistic interdependence. One of the earliest observations of productive cross-lingual transfer in bilingual programs was made by Lambert and Tucker (1972) who noted that students in the Montreal-area French immersion program they evaluated

engaged in a form of contrastive linguistics where they compared grammatical and lexical aspects of French and English. This spontaneous focus by students on similarities and differences in their two languages occurred despite the fact that, as noted above, teachers kept the two languages rigidly separate.

A theoretical rationale for teaching for cross-linguistic transfer was articulated in the late 1970s by Cummins (1979, 1981) who noted consistently significant relationships among academic aspects of L1 and L2 (e.g., reading comprehension). On the basis of these cross-lingual relationships and a variety of other data (e.g., bilingual program outcomes, age effects in L2 learning), he formulated the “interdependence hypothesis,” which posited that at a cognitive level, languages are not separate but connect with each other by means of a common underlying proficiency. This hypothesis was formally expressed as follows (Cummins 1981):

To the extent that instruction in L_x is effective in promoting proficiency in L_x, transfer of this proficiency to L_y will occur provided there is adequate exposure to L_y (either in school or environment) and adequate motivation to learn L_y. (p. 29)

In concrete terms, what this hypothesis implies is that in, for example, a dual language Spanish-English bilingual program in the USA, Spanish instruction that develops Spanish reading and writing skills is not just developing *Spanish* skills, it is also developing a deeper conceptual and linguistic proficiency that is strongly related to the development of literacy in the majority language (English). In other words, although the surface aspects (e.g., pronunciation, fluency, etc.) of different languages can be distinguished, there is an underlying cognitive/academic proficiency that is common across languages. This common underlying proficiency makes possible the transfer of cognitive/academic or literacy-related proficiency from one language to another.

There is extensive empirical research that supports the interdependence of literacy-related skills and knowledge across languages (see reviews by Baker 2001; Dressler and Kamil 2006; Cummins 2001; Genesee et al. 2006). Thomas and Collier (2002), for example, found that immigrant students’ L1 proficiency at the time of their arrival in the USA was a strong predictor of English academic development. The research trends can also be illustrated by the research of Verhoeven (1991) in the context of two experimental transitional bilingual programs involving Turkish-background students in the Netherlands. These programs promoted L1 literacy over several elementary school grades. Verhoeven reported that bilingual instruction resulted in better literacy results in L1 at no cost to L2. In fact, in comparison to students receiving Dutch-only instruction, those in the bilingual transitional classes showed somewhat better performance in Dutch and a more positive orientation toward literacy in both L1 and L2. The study also supported the interdependence hypothesis by showing that “literacy skills being developed in one language strongly predict corresponding skills in another language acquired later in time” (p. 72).

The evidence supporting cross-lingual interdependence is clearly summarized by Dressler and Kamil as part of the Report of the National Literacy Panel on Language-Minority Children and Youth (August and Shanahan 2006). They conclude:

In summary, all these studies provide evidence for the cross-language transfer of reading comprehension ability in bilinguals. This relationship holds (a) across typologically different languages . . . ; (b) for children in elementary, middle, and high school; (c) for learners of English as a foreign language and English as a second language; (d) over time; (e) from both first to second language and second to first language; (p. 222)

A recent study carried out in Taiwan provides strong support for cross-linguistic interdependence. In a sample of 30,000 grade 9 students, Chuang et al. (2012) reported correlations of 0.79 between Mandarin and English reading ability. The fact that more than 60 % of the variance in English reading could be accounted for by Chinese reading suggests that cross-lingual interdependence operates even when there are few linguistic commonalities between the languages.

Research examining cross-linguistic relationships between natural sign languages (e.g., American Sign Language [ASL] and spoken languages reinforces this conclusion (see Hoffmeister and Caldwell-Harris (2014) for a review). For example, Strong and Prinz (1997) investigated relationships between English literacy and ASL in a sample of 155 students between ages 8 and 15 attending a residential school for the deaf in California. Forty of the students had deaf mothers and 115 had hearing mothers. They reported that ASL skill was significantly correlated with English literacy and children with deaf mothers outperformed children with hearing mothers in both ASL and English reading and writing. They also reported evidence that the differences in English literacy between children of deaf mothers and children of hearing mothers could be accounted for by the differences in ASL proficiency between these two groups.

The research evidence suggests six major types of cross-lingual transfer that will operate in varying ways depending on the sociolinguistic and educational situation:

- Transfer of conceptual elements (e.g., understanding the concept of *photosynthesis*)
- Transfer of specific linguistic elements (e.g., knowledge of the meaning of *photo* in *photosynthesis*)
- Transfer of more general morphological awareness (e.g., awareness of the function of *-tion* in *acceleration* [English] and *acceleration* [French])
- Transfer of phonological awareness – the knowledge that words are composed of distinct sounds
- Transfer of metacognitive and metalinguistic learning strategies (e.g., strategies of visualizing, use of graphic organizers, mnemonic devices, vocabulary acquisition strategies, etc.)
- Transfer of pragmatic aspects of language use (e.g., willingness to take risks in communication through L2, ability to use paralinguistic features such as gestures to aid communication, etc.)

The question sometimes arises as to whether we are talking about transfer or the existence of underlying attributes based on cognitive and personality attributes of the individual. For example, can the relationship between L1 and L2 reading comprehension be explained by the fact that both are related to underlying cognitive attributes of the individual? In reality, transfer and attributes are two sides of the same coin. The

presence of the underlying attribute makes possible transfer across languages. Attributes (e.g., verbal cognitive abilities) develop through experience; in other words, they are learned. Once they exist within the individual's cognitive apparatus or operating system (Baker 2001), they are potentially available for two-way transfer across languages. In other words, transfer will occur from L_x to L_y or from L_y to L_x if the sociolinguistic and educational context is conducive to, or supports, such transfer.

Dynamic systems theory. Grosjean (1989) originally emphasized that “the bilingual is not two monolinguals in one person” and this insight was subsequently elaborated in Cook's (1995, 2007) concept of *multicompetence*, which highlighted the fact that multicompetence is not comparable to monolingual competence in each language. Herdina and Jessner (2002) and de Bot et al. (2007) elaborated this perspective by proposing a dynamic systems theory which argued that the presence of one or more language systems influences the development not only of the second language but also the development of the overall multilingual system, including the first language. Dynamic systems theory goes beyond the notion of interdependence across languages by highlighting the fact that the entire psycholinguistic system of the bi- and multilingual is transformed in comparison to the relatively less complex psycholinguistic system of the monolingual. As expressed by Jessner (2006), there is “a complete metamorphosis of the system involved and not merely an overlap between two subsystems” (p. 35).

Dynamic systems theory and the concept of multicompetence are not in any way inconsistent with the notion of a common underlying proficiency. The interdependence hypothesis and common underlying proficiency construct were addressed to the explanation of a different set of issues and clearly do not aim to provide an elaborated cognitive model of bi/multilingualism. What all these constructs share is a recognition that the languages of bi- and multilinguals interact in complex ways that can enhance aspects of overall language and literacy development. They also call into question the pedagogical basis of monolingual instructional approaches that appear dedicated to minimizing and inhibiting the possibility of two-way transfer across languages.

Empirical Contributions

Lin's (1996) study of classroom Cantonese-English code-switching in Hong Kong schools was one of the first to cast doubt on the legitimacy of linguistic segregation in bilingual education and L2 immersion contexts. The classrooms she observed were ostensibly “English-medium” but operated in a Cantonese-English oral mode and English written mode. Rather than characterizing this instructional code-switching as inherently problematic and a failure to faithfully implement an English immersion model, Lin highlighted the sociocultural, linguistic, and educational functions it served. According to Lin, these practices represented teachers' and students' pragmatic and expedient response to cope with the symbolic domination of English in the Hong Kong context. However, because official policies discouraged bilingual classroom practices, teachers were largely unwilling to acknowledge

code-switching and bilingual language use in the classroom. As a consequence, there was no discussion at either policy or school level of the most appropriate approaches to bilingual language use for instructional purposes.

Lin (1996, 1997) pointed to the negative consequences of the lack of inquiry into alternative approaches to developing bilingualism among Hong Kong students. The bilingual practices observed did not affirm the value or support the development of Chinese academic literacy, thereby perpetuating the ideological domination of English academic monolingualism. Lin (1997) called for the development of “viable bi/tri/multilingual education approaches that will enable the majority of students to bridge the multiple linguistic gaps between their home world and their school world: the gaps between their mother tongue (Cantonese) and Chinese literacy, between Cantonese and spoken English, and between Chinese literacy and English literacy” (p. 288).

Over the past 15 years, educators and researchers working collaboratively have begun to move in the direction advocated by Lin by exploring alternative approaches to bringing home and school languages into productive contact with the goal of affirming and developing both. These bilingual instructional strategies (Cummins 2007) or translanguaging strategies (Canagarajah 2011; Creese and Blackledge 2010; García 2009; García and Li Wei 2014) have evolved within “monolingual” L2-medium classes for emergent bilingual students (e.g., Auger 2008; Cummins and Early 2011; Cummins and Persad 2014; Hélot et al. 2014), bilingual programs for emergent bilingual students (e.g., Celic and Seltzer 2011; García and Li Wei 2014) and L2 immersion programs for dominant language speakers (e.g., Lyster et al. 2009, 2013).

Two examples of students’ reflections (from Cummins and Early 2011) will illustrate both interdependence across languages and the effects of encouraging productive L1-L2 contact in the learning process. These late elementary grade students were in their first year of learning English in Lisa Leoni’s English-as-a-second language class in the Greater Toronto Area. Lisa had encouraged students to carry out creative writing and assignments in their L1 and generally use their L1 as a stepping stone to English.

When I am allowed to use my first language in class it helps me with my writing and reading of english because if I translation in english to urdu then urdu give me help for english language. I also think better and write more in english when I use urdu because I can see in urdu what I want to say in english. (Aminah; original spelling retained).

When I am allowed to use Urdu in class it helps me because when I write in Urdu and then I look at Urdu words and English comes in my mind. So, its help me a lot. When I write in English, Urdu comes in my mind. When I read in English I say it in Urdu in my mind. When I read in Urdu I feel very comfortable because I can understand it. (Hira; original spelling retained)

Emerging Issues

Two related issues relevant to the conceptualization of cross-linguistic transfer have emerged in recent years. The first concerns the terminological question of whether it is more appropriate to refer to individuals’ knowledge of multiple languages as

“plurilingualism” or “multilingualism”. The second concerns the question of whether it is legitimate to refer to “languages” as constructs or entities at all as opposed to using the verb form “linguaging” to express the integrated or fused nature of how people draw on their linguistic repertoires. Clearly, if the concept of “languages” is not legitimate, then it is problematic to talk about cross-linguistic transfer or bringing students’ languages into productive contact.

Plurilingualism or Multilingualism?

The Council of Europe (2001) elaborated the construct of plurilingualism to refer to the dynamically integrated and intersecting nature of bilingual and plurilingual individuals’ linguistic repertoires, which include unevenly developed competencies in a variety of languages, dialects, and registers (Cenoz and Gorter 2013; Coste et al. 2009; Piccardo 2013). Researchers who have adopted this terminology make a clear distinction between plurilingualism and multilingualism: the former is seen as expressing the mutual influence and dynamic relations among languages and dialects while the latter is characterized as implying a static and autonomous conception of languages. It is clear that this conception of plurilingualism is highly congruent with dynamic systems theories of multilingualism. The distinction is elaborated by Piccardo (2013):

Multilingualism keeps languages distinct both at the societal level and at the individual level. It also tends to stress the separate, advanced mastery of each language a person speaks. Plurilingualism, on the contrary, is focused on the fact that languages interrelate and interconnect particularly, but not exclusively, at the level of the individual. It stresses the dynamic process of language acquisition and use, in contrast with coexistence and balanced mastery of languages. (Council of Europe 2001, p. 601)

This distinction, however, is not universally accepted. Conteh and Meier (2014), for example, use both terms and point out that the choice of term depends largely on the researcher’s intellectual tradition, with plurilingualism being used more commonly in the francophone scientific community and multilingualism in the anglophone scientific community. Gajo (2014) points out that within the francophone tradition, multilingualism refers to the societal level and plurilingualism to the individual level.

The relevance of this debate in the current context is that none of the researchers who continue to use the term “multilingualism” to refer to both societal and individual realities would associate the term with the negative characterization outlined above. None of the researchers who discuss the “multilingual turn” in language education (e.g., Conteh and Meier 2014; May 2014) have characterized the languages of bi/multilinguals as autonomous systems separated by rigid boundaries. Their use of the term is entirely consistent with its use within a dynamic systems theory and largely indistinguishable from the conception advocated by those who prefer the term “plurilingualism.” Similarly, the pedagogical approaches implied by notions such as “teaching for transfer” or “teaching through a

multilingual lens” (e.g., Cummins 2014) in no way imply a static notion of multilingualism. My preference is to use both terms with “plurilingualism” preferred when the communicative goal is to emphasize specifically the dynamic and integrated relationships among language varieties within the individual.

Do Languages Exist?

The notion of cross-linguistic transfer has recently been questioned by García and Li Wei (2014) on the grounds that the construct of “a language” itself is illegitimate. They argue that there is only one linguistic system with features that are totally integrated rather than being associated with any one language. The terms *linguaging* and *translinguaging* are preferred in order to position “language” as a social practice in which learners engage rather than a set of structures and functions that they learn. As noted above, the relevance of this position for the present chapter is that if languages do not exist, then it is meaningless to talk about transfer from one language to another.

Based on this conceptualization of translinguaging, García and Li Wei (2014) highlight some problematic issues in relation to scholars “who still speak about L1, L2 and code-switching” (p. 62). They also argue that we can now “shed the concept of *transfer*. . . [in favor of] a conceptualization of *integration* of language practices in *the person of the learner*” (emphasis original) (p. 80). They question the notion of a common underlying proficiency because it still delineates separate L1 and L2 and separate linguistic features (p. 14): “Instead, translinguaging validates the fact that bilingual students’ language practices are not separated into an L1 and an L2, or into home language and school language, instead transcending both” (p. 69). They do admit that the linguistic features of the single integrated system are “often used in ways that conform to societal constructions of ‘a language’, and at other times used differently” (p. 15).

In light of the issues raised by García and Li Wei (2014), it is important to clarify the status of terms such as “home language” and “school language” (and L1/L2). Carried to its logical conclusion, the critique of the construct of “language” would mean that it would be illegitimate for a child to express an utterance such as “My home language is English but my school language is French.” It would also be illegitimate for web sites such as *Ethnologue* (www.ethnologue.com) to refer to and provide information about the 7,106 languages and dialects that humanity has generated. One could also not talk about Spanish-English (and other) bilingual programs since these languages do not exist. To claim that languages exist as social constructions but have no legitimacy “in reality” raises the issue of what is “reality” and what is a “social construction.”

García and Li Wei’s (2014) critique focuses on the linguistic reality of the construct of “language” rather than its social reality. Languages are clearly social constructions with arbitrary boundaries (e.g., between a “language” and a “dialect”) but these social constructions generate an immense material and symbolic reality (e.g., dictionaries, school curricula, wars, profits for corporations that teach and test

languages, etc.). It is entirely possible to reconcile the construct of translanguaging, which highlights the integrated conceptual/linguistic system through which plurilingual individuals process and use language, with the social reality of different languages, understood as historical, cultural, and ideological constructs that have material consequences and determine social action (e.g., language planning, bilingual programs, etc.).

An analogy can be made with the construct of “colors.” We commonly talk about distinct colors such as red, yellow, and blue as though colors had an autonomous and objective existence. Yet we know that these “colors” represent arbitrary cut-off points on the visible spectrum. Although each color corresponds to a particular wavelength range, the spectrum represents a continuum with no objective divisions. In western society, we typically distinguish about seven major colors even though the human eye can distinguish about ten million color variations. In short, the major colors we distinguish are social constructions that we use to make sense of and act on our world (e.g., paint our house). Despite their lack of “objective” reality, few people would argue that we should abandon any reference to distinct colors. In the same way, it can be argued that the boundaries between different languages represent social constructions, but it is nevertheless legitimate to distinguish languages in certain contexts and for certain purposes in order to make sense of and act on our worlds. Thus, it is no more problematic for a 10-year old to talk about her “home language” and “school language” than it is for the same child to distinguish her red toy from her blue toy.

The essence of the conceptualization of translanguaging proposed by García and Li Wei (2014) can be maintained by acknowledging that: (a) the boundaries between languages/dialects are fluid and socially constructed; (b) as emergent bilinguals gain access to their two languages, these languages become fused into a single system (common underlying proficiency); (c) languages and languaging are socially contested sites and encounters where the legitimacy of cultures and identities are negotiated; and (d) school programs serving plurilingual/multilingual students should connect with students’ background linguistic and conceptual knowledge and teach for transfer and greater integration across languages.

Conclusion

There is overwhelming research evidence that literacy-related skills transfer across languages as bilingual development progresses through the school years. Educators and researchers working collaboratively have begun to identify multiple ways in which teachers can use bilingual instructional strategies to support this transfer process both in order to increase students’ overall metalinguistic awareness and promote academic development in both languages. As our understanding of bilingual and multilingual development has advanced, researchers have elaborated constructs such as *translanguaging* and *plurilingualism* to express the dynamic nature of bilingual and multilingual cognitive processing. These constructs expose the intellectual fragility of the notion that the two (or more) languages of the bilingual or L2

learner should be kept rigidly separate in bilingual instruction. However, the integrated nature of bilingual language processing does not require us to relinquish the construct of specific “languages” nor to banish from the lexicon constructs such as “home language,” “school language,” L1/L2, etc. Similarly, it is legitimate to talk about and promote instruction that teaches for transfer across languages.

Cross-References

- ▶ [Multicompetence Approaches to Language Proficiency Development in Multilingual Education](#)
- ▶ [Signed Languages in Bilingual Education](#)
- ▶ [Translanguaging in Bilingual Education](#)

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Translanguaging in Bilingual Education

Ofelia García and Angel M. Y. Lin

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Abstract

Since Cen Williams first used the Welsh term *trawsieithu* in 1994 to refer to a pedagogical practice where students in bilingual Welsh/English classrooms are asked to alternate languages for the purposes of receptive or productive use, the term *translanguaging* has been increasingly used in the scholarly literature to refer to both the complex and fluid language practices of bilinguals, as well as the pedagogical approaches that leverage those practices. This chapter reviews the growing scholarly literature that takes up the term translanguaging and discusses the ways in which the term is contested. We focus here on the potential and the challenges that a translanguaging theory provides for bilingual education. After a review of the scholarship, we discuss two of the problems that the scholarship on translanguaging and bilingual education makes evident – (1) that there are two competing theories of translanguaging, one which upholds national languages

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and calls for a softening of those boundaries in bilingual education and a second “strong” version which posits a single linguistic repertoire for bilingual speakers and thus an essential feature of bilingual education, and (2) the fear that translanguaging in bilingual education would threaten the minority language. In this light, we consider how translanguaging theory impacts issues of language allocation and pedagogy in bilingual education.

Keywords

Assessment • Bilingual education • Code-switching • Pedagogy • Translanguaging

Introduction

Since Cen Williams first used the Welsh term *trawsieithu* in 1994 to refer to a pedagogical practice where students in bilingual Welsh/English classrooms are asked to alternate languages for the purposes of receptive or productive use, the term *translanguaging* has been increasingly used in the scholarly literature to refer to both the complex and fluid language practices of bilinguals, as well as the pedagogical approaches that leverage those practices. This chapter reviews the growing scholarly literature that takes up the term translanguaging and discusses the ways in which the term is contested. We focus here on the potential and the challenges that a translanguaging theory provides for bilingual education. After a review of the scholarship, we discuss two of the problems that the scholarship on translanguaging and bilingual education makes evident – (1) that there are two competing theories of translanguaging, one which upholds national languages and calls for a softening of those boundaries in bilingual education and a second “strong” version which posits a single linguistic repertoire for bilingual speakers and thus an essential feature of bilingual education, and (2) the fear that translanguaging in bilingual education would threaten the minority language. In this light, we consider how translanguaging theory impacts issues of language allocation and pedagogy in bilingual education.

Early Developments

Although different epistemologically, translanguaging is linked to the study of code switching in education in that it also disrupts the traditional isolation of languages in language teaching and learning. Throughout the world, code switching, understood as the going back and forth from one language to another, has been used by teachers to scaffold the teaching of additional languages. Although this practice has not been generally legitimized in language-teaching scholarship, teachers engage in code switching on a day-to-day basis. It is, however, when this linguistic behavior is used to teach language-minoritized students that this practice becomes extremely contested. The fear, of course, is that the state or national language would be

“contaminated” by the other language. And yet, scholars have documented how teachers regularly code switch to make meaning comprehensible to students when they are taught through a colonial or dominant language (see, e.g., Lin and Martin 2005). Arthur and Martin (2006) speak of the “pedagogic validity of code switching” in situations in which students do not understand the lessons.

Despite the documentation of code switching as a prevalent pragmatic practice, code switching is “rarely institutionally endorsed or pedagogically underpinned” (Creese and Blackledge 2010, p. 105). In the late 1980s, Rodolfo Jacobson developed what he called the “concurrent approach,” although it was never fully legitimized (Jacobson 1990). Jacobson’s approach relied on having teachers code switch strategically, although only inter-sententially. Whether code switching is done pragmatically by the teacher or as in the Jacobson approach with pedagogical intent, code switching in the education literature, valuable as it may be, focuses not in sustaining bilingualism per se, but in teaching in, or simply teaching, an additional language. In this respect, the concept of translanguaging makes a very different contribution and it is, as we will discuss, an epistemologically different concept because it questions the proposition that what bilinguals are doing is going from one language to another.

In its Welsh origins, translanguaging, or *trawsieithu* as it was originally coined in Welsh (Williams 1994), referred to a pedagogical practice in bilingual education that deliberately changed the language of input and the language of output. Up to the time that Welsh scholars raised a voice of concern and questioned the long-held belief in language separation for language development, language scholars, with some exceptions, continued to view bilingualism, and bilingual education, as simply the addition of two separate languages. Armed, however, with a strong bilingual identity, the Welsh scholars understood that bilingualism was precisely an important instrument in the learning and development of their integrated bilingualism, as well as in the cognitive involvement that was required to be educated bilingually. Lewis et al. (2012b) clarify that translanguaging refers to using one language to reinforce the other in order to increase understanding and augment the pupil’s activity in both languages.

Colin Baker, one of the most influential scholars in the field of bilingual education, observed how the practice of what he first translated from the Welsh *trawsieithu* as *translanguaging* helped students make meaning and gain understandings and knowledge. He explained: “To read and discuss a topic in one language, and then to write about it in another language, means that the subject matter has to be processed and “digested”” (2011, p. 289). Baker (2001) pointed out four potential educational advantages to translanguaging:

1. It may promote a deeper and fuller understanding of the subject matter.
2. It may help the development of the weaker language.
3. It may facilitate home-school links and cooperation.
4. It may help the integration of fluent speakers with early learners.

A 5-year research project in Wales has determined that translanguaging was used as the only or dominant approach in approximately one-third of the 100 lessons

observed (Lewis et al. 2013). Lewis et al. (2013) found pedagogically effective examples of translanguaging in Welsh classrooms, although it was predominantly found in the latter years of primary education, and in the arts and humanities. The same Welsh researchers have concluded that in translanguaging, “*both languages are used in a dynamic and functionally integrated manner* to organise and mediate mental processes in understanding, speaking, literacy, and, not least, learning” (2012a, p. 1, our italics).

Translanguaging should also be seen differently from code switching. Code switching, even to those scholars who see it as linguistic mastery (see, for example, Auer 2005; Gumperz 1982; Myers-Scotton 2005), is based on the monoglossic view that bilinguals have two separate linguistic systems. Translanguaging, however, posits the linguistic behavior of bilinguals as being always heteroglossic (see Bakhtin 1981; Bailey 2007), always dynamic, responding not to two monolingualisms in one but to one integrated linguistic system. It is precisely because translanguaging takes up this heteroglossic and dynamic perspective centered on the linguistic use of bilingual speakers themselves, rather than starting from the perspective of named languages (usually national or state languages), that it is a much more useful theory for bilingual education than code switching. It is precisely because of its potential in building on the dynamic bilingualism of learners (García 2009) that translanguaging has been taken up by many bilingual educators and scholars in the twenty-first century.

Major Developments

Throughout history, bilingual programs had usually encouraged additive bilingualism for language majorities where an additional second language was simply separately added to a first. However, for language-minoritized people, schools had tended to pursue subtractive bilingualism, taking away the child’s home language. But as a result of the ethnic revival and the demands of minority groups for their civil rights in the second half of the twentieth century, bilingual education became a way of developing the bilingualism of language-minoritized people, especially of those groups that had experienced language shift and language loss as a result of monolingual schooling. In opening up the door of developmental bilingual education for all, a different type of bilingualism came into view, one that not always respected the sociopolitical boundaries that had been established among languages. It is this type of bilingualism that García (2009) has labeled dynamic bilingualism and that is enacted in what we call translanguaging.

At the end of the first decade of the twenty-first century then, three publications extended the concept of translanguaging beyond the Welsh context and in so doing transformed it. One was *Bilingual Education in the 21st Century: A Global Perspective* (2009) by Ofelia García. The other two were by Blackledge and Creese – one an article in *The Modern Language Journal* (Creese and Blackledge 2010) and the other a book titled *Multilingualism: A Critical Perspective* (Blackledge and Creese 2010). Other works on translanguaging soon followed. Canagarajah (2011a, b),

Li Wei (2011), and Hornberger and Link (2012) were among the first to join the dialogue and deepen the work. And Lewis et al. (2012a, b) responded with more translanguaging understandings from the Welsh perspective, also updating and extending Williams' original definition.

From the beginning there have been differences in the way in which scholars have taken up translanguaging, and as the dialogue continues, the concept itself has undergone some changes. In 2009, and speaking specifically about bilingual education, García posited translanguaging as “an approach to bilingualism that is centered not on languages as has been often the case, but on the practices of bilinguals that are readily observable” (p. 44). These practices, in which bilinguals “intermingle linguistic features that have hereto been administratively or linguistically assigned to a particular language or language variety” (p. 51), are “the normal mode of communication that, with some exceptions in some monolingual enclaves, characterizes communities throughout the world” (p. 44). Translanguaging, García (2009) continues, are “*multiple discursive practices* in which bilinguals engage in order to *make sense of their bilingual worlds*” (p. 45, emphasis in original). In education, García says, translanguaging goes beyond code switching and translation because it refers to the *process* by which bilingual students perform bilingually in the myriad multimodal ways of classrooms. García's 2009 text begins to extend the Welsh translanguaging concept as it questions, based on Makoni and Pennycook's influential 2007 book, the concept of language that had been the foundation of all bilingual education enterprise. In Part III of the 2009 book, García also begins to shape a translanguaging pedagogy for bilingual classrooms.

Likewise Blackledge and Creese (2010) speak about flexible bilingualism “without clear boundaries, which places the speaker at the heart of the interaction” (p. 109). Drawing on their ethnographic research in ethnic community complementary schools in the UK, Creese and Blackledge (2010) describe how the students' flexible bilingualism, their translanguaging, is used by teachers to convey ideas and to promote “cross-linguistic transfer.” In examining the translanguaging pedagogies used in complementary schools, Creese and Blackledge (2010) state:

Both languages are needed simultaneously to convey the information, . . . each language is used to convey a different informational message, but it is in the bilingualism of the text that the full message is conveyed. (p. 108)

And in analyzing the pair work students do, they comment: “It is the combination of both languages that keeps the task moving forward” (p. 110). In the complementary school classrooms they were studying, Creese and Blackledge (2010) witnessed the use of bilingual label quests, repetition and translation across languages, and the use of simultaneous literacies to engage students, establish students' identity positions, keep the pedagogic task moving, and negotiate meanings. For Creese and Blackledge, the translanguaging pedagogical approach of these complementary schools is used both for identity performance and for language learning and teaching. Language is just a social resource without clear boundaries of nation, territory, and social group.

Involved in the research on complimentary schools in the UK led by Blackledge and Creese, Li Wei (2011) developed the concept of a *translanguaging space* where the interaction of multilingual individuals “breaks down the artificial dichotomies between the macro and the micro, the societal and the individual, and the social and the psycho in studies of bilingualism and multilingualism” (p. 1234). A translanguaging space allows multilingual individuals to integrate social spaces that have been formerly practiced separately in different places. For Li Wei (2011), translanguaging is going both *between* different linguistic structures and systems and modalities and going *beyond* them. He says:

The act of translanguaging then is transformative in nature; it creates a social space for the multilingual user by bringing together different dimensions of their personal history, experience and environment, their attitude, belief and ideology, their cognitive and physical capacity into one coordinated and meaningful performance. (p. 1223)

Translanguaging, according to Li Wei, embraces both *creativity*, that is, following or flouting norms of language use, and *criticality*, that is, using evidence to question, problematize, or express views (Li Wei 2011).

In his work on writing, Canagarajah had used the term “codemeshing” to refer to a “communicative device used for specific rhetorical and ideological purposes in which a multilingual speaker intentionally integrates local and academic discourse as a form of resistance, reappropriation and/or transformation of the academic discourse” (Michael-Luna and Canagarajah 2007, p. 56). For Canagarajah, codemeshing differs from code switching in that it refers to one single integrated system in which there is a mixing of communicative modes and diverse symbol systems other than language per se. Michael-Luna and Canagarajah (2007) identified codemeshing strategies, which include selecting multilingual and multimodal texts and modeling oral and written codemeshing so as to encourage student agency in language choice.

In 2011 Canagarajah takes up the term translanguaging as “the ability of multilingual speakers to shuttle between languages, treating the diverse languages that form their repertoire as an *integrated* system” (p. 401, our italics). And yet, Canagarajah (2011a) points out that we have not developed a taxonomy of translanguaging strategies or theorized those practices. In his 2013 book, he coins the term *translingual practice* as an umbrella for the many terms that are presently being used to reflect the fluidity of language practices today – polylingualism, metrolingualism, codemeshing, and translanguaging – and says:

The term translingual conceives of language relationships in more dynamic terms. The semiotic resources in one’s repertoire or in society interact more closely, become part of an integrated resource, and enhance each other. The languages mesh in transformative ways, generating new meanings and grammars. (p. 8)

Canagarajah prefers the term translingual practices because he maintains that unlike translanguaging, translingual practices focus on the social practices of mixing modes and symbol systems as a creative improvisation to adapt to the needs of the

context and the local situations (Canagarajah 2011b). We, however, insist that translanguaging is not solely a social practice but also a linguistic theory that poses a mental grammar shaped, of course, through social interaction and negotiation (see Otheguy, García and Reid 2015).

Hornberger's *Continua of Bilinguality* (2003) had addressed the complex relationship between the languages of bilinguals. Hornberger (2005) explains:

Bi/multilinguals' learning is maximized when they are allowed and enabled to draw from across all their existing language skills (in two+ languages), rather than being constrained and inhibited from doing so by monolingual instructional assumptions and practices. (p. 607)

Translanguaging, Hornberger and Link (2012) claim, builds on Hornberger's continua of bilinguality. By doing away with the distinctions between the "languages" of bilinguals, translanguaging offers a way for students to draw on the diverse aspects of the Hornberger continua.

Scholars working on translanguaging have increasingly questioned the concept of language. Busch (2013) summarizes this trend, saying: "There is consent among the authors who deal with translanguaging that the focus of interest is shifting from languages to speech and repertoire and that individual languages should not be seen unquestioningly as set categories" (p. 506).

It is this position that was taken up by García and Li Wei in their 2014 book, *Translanguaging: Language, Bilingualism and Education*. That book is divided into two sections. The first section addresses a theory of translanguaging, building on the concept of languaging and of dynamic bilingualism. The second section gives examples of translanguaging in classrooms.

From a linguistic theory perspective, Otheguy, García and Reid (2015) explicitly differentiate translanguaging from code switching, defining translanguaging as "the deployment of a speaker's full linguistic repertoire without regard for watchful adherence to the socially and politically defined boundaries of named (and usually national and state) languages" (p. 3). This has deep social justice implications for the education of bilingual students. Whereas monolingual students are usually allowed the full use of their linguistic repertoire in assessment and in learning, bilinguals are seldom permitted to do so, thus keeping them silent and unengaged in teaching and assessment activities. We will return to what this means for bilingual education in the section on "[Problems and Difficulties](#)."

More Developments and Work in Progress

The take-up of the term translanguaging in the literature has been swift (see also, Li Wei and García, [forthcoming](#)). We focus here on how translanguaging has been used specifically in bilingual education. As more scholars take up translanguaging, it sometimes has drifted in meaning. Flores (2014) warns us that translanguaging is not simply a research methodology, or code switching, additive bilingualism, or a plain

response to globalization, as many claim. Translanguaging, Flores tells, is “a political act.” Although many are using the term, not all scholars see it in this vein.

In the USA, translanguaging has been taken up by scholars especially to push back against the “two solitudes,” to quote Jim Cummins (2007), that characterize dual language bilingual programs. In those programs, sometimes called “two-way immersion,” the languages are strictly separated. Many of the dual language bilingual programs are said to be two-way, attempting to include language majority and language minority students in balanced numbers. Although popular in the social imagination and among educators for whom this is the only way in the USA to develop bilingualism, there is controversy about whether these programs do serve language-minoritized children (see Valdés 1997; Palmer et al. 2014). Scholars have begun to use the concept of translanguaging both to describe the actual language practices in those classrooms and to carve a space for different language use in order to meaningfully educate language-minoritized children.

Palmer, Martínez, and their colleagues (2014) explore the instruction of two experienced bilingual teachers in dual language classrooms and give evidence of the translanguaging practices used by the students, as well as some translanguaging instructional strategies used by the teachers. Gort and Sembiante (2015) explore how translanguaging pedagogies support young emergent bilingual children in a pre-school Spanish-English dual language bilingual program. All of these scholars document how despite the policy of linguistic compartmentalization in the classroom, teachers cross these artificial boundaries to ensure that children are educated bilingually. The issue of the *International Multilingual Research Journal*, edited by Mileidis Gort (2015), gives evidence of the growing appeal of translanguaging for purposes of making the structures and practices in dual language bilingual education classrooms more flexible.

Language practices in transitional bilingual education programs have also been explained using the concept of translanguaging. Sayer (2013), for example, describes how in a second-grade transitional bilingual education classroom in San Antonio, Texas, Latino students and their bilingual teacher use features of what is named Spanish, English, and TexMex to mediate not only academic content but also the standard languages used in the classroom.

A translanguaging theoretical framework has also been increasingly used to study bilingual practices in early childhood bilingual education. In an Arabic-Hebrew bilingual kindergarten in Israel, Schwartz and Asli (2014) describe how both the children and their teachers use translanguaging. Garrity et al. (2015) have shown how infants aged 6–15 months in what is supposedly a dual language bilingual classroom use Spanish, English, and baby sign languages in what they called “simultaneous translanguaging practice.”

In the Basque Country, where trilingual education in Basque, Spanish, and English is becoming commonplace, Cenoz and Gorter are conducting research on how a translanguaging pedagogy can support the students’ trilingualism. In a school with a progressive orientation of the Sistema Amara Berri, students go to three

different classrooms daily where they work through one of three languages. Each classroom is organized into four tasks and four different groups that work collaboratively. Cenoz, Gorter, and their research team have developed translanguaging instructional material to be used with two of the four groups as they work in the different language classrooms. For example, in the Basque material for the Basque classroom, the experimental translanguaging material asks students to compare certain structures, vocabulary, or discourse in Basque to those in Spanish or English. The team is assessing student progress in each language when translanguaging tasks are introduced. Cenoz and Gorter's recent book titled *Multilingual Education: Between Language Learning and Translanguaging* (2015) contains contributions that support a translanguaging approach, arguing for the inclusion of the child's full and unique language repertoire in instruction.

It may be deaf bilingual education where the concept of translanguaging has proven more useful. Swanwick (2015) has been doing work on the bimodal bilingual translanguaging of deaf children and has found it to be a useful means of conceptualizing their language practices and the ways in which they use their language repertoires in the different spaces through which they move.

Although translanguaging is evident in bilingual and multilingual programs described by scholars, it is difficult for teachers, steeped in monoglossic language ideologies, to accept translanguaging. Martínez et al. (2014) explore how teachers in two Spanish-English bilingual elementary classrooms fluidly use their entire language repertoire while expressing ideologies of linguistic purism that emphasize language separation and showing concern about protecting the minoritized language.

It is precisely because even bilingual teachers suffer from monoglossic ideologies on language and bilingual instruction that developing translanguaging pedagogical strategies is so important. The project CUNY-NYSIEB has developed a number of pedagogical resources accessible on the project's website (www.cuny-nysieb.org). García et al. (2017) and García and Kleyn (2016) also offer guidance on curricular design, pedagogy, and assessment using translanguaging.

In assessment, López et al. (forthcoming) are developing a way of assessing bilingual students' knowledge of subject matter content through translanguaging. Using a computer-based platform (CBT), students have the opportunity to see or hear an item in both English and Spanish and to then write or say responses using their full language repertoire. To create the space for translanguaging and encouraging student-to-student interactions, students are asked to select a virtual friend or assistant. The translanguaged multimodal assessment creates a space for translanguaging by stimulating student-to-student interactions and promoting what López and his colleagues call "bilingual autonomy."

Clearly translanguaging has made its mark in the bilingual education scholarship, although its entrance has not been without controversy. In the next section, we discuss some of the problems and difficulties involved with translanguaging and bilingual education.

Problems and Difficulties

One of the problems that plagues translanguaging work in education has to do with the tension between two theoretical positions on translanguaging. On the one hand, there is the strong version of translanguaging, a theory that poses that bilingual people do not speak languages but rather, use their repertoire of linguistic features selectively. On the other hand, there is a weak version of translanguaging, the one that supports national and state language boundaries and yet calls for softening these boundaries.

The weak version of translanguaging has been, in some ways, with us for a long time, ever since the pioneer and premier scholar of bilingual education, Jim Cummins, taught us about linguistic interdependence and transfer (see Cummins, “► [Teaching for Transfer in Multilingual School Contexts](#),” this volume). Originally, Cummins hypothesis didn’t say anything about language separation in instruction; it simply alleged that instructional time spent through one language impacted the development of the other. But with time, Cummins (2007) started rethinking monolingual instructional strategies in bilingual education and challenging what he called “the two solitudes” especially in immersion bilingual education programs. Many scholars today follow Cummins in calling for flexible instructional strategies in bilingual education (see, for example, Lin 2013), but some use the term “translanguaging” to describe both the children’s fluid language use and the flexible strategies used in classrooms.

Although we support the strong version of translanguaging as a linguistic theory (see Otheguy, García and Reid 2015), bilingual education responds to the conception of languages as defined by states and nations. After all, languages as names of enumerable things have been socially constructed, maintained, and regulated especially through schools. It is important then to understand that named national and state languages have had real and material consequences and continue to have them. But to advocate for fairer and more just assessments and a more appropriate bilingual education that gives voice to all children, no matter what their language practices, are requires that we understand that named languages, imposed and regulated by schools, have nothing to do with individuals and the linguistic repertoire they use. From the bilingual child’s perspective, the language they have belongs to them and not to the nation or the state.

True, bilingual education must develop bilingual students’ ability to use language according to the rules and regulations that have been socially constructed for that particular named language. For some national groups, and especially groups that have been marginalized and have undergone language loss and shift, bilingual education is a way of revitalizing their language practices. But to get students to use features of the “named languages,” to get them to appropriate those features as part of their linguistic repertoire, educators must first concede that the lexical and structural features that make up a bilingual student’s repertoire are valid and need to be leveraged and used. This is, of course, where translanguaging pedagogical strategies come in, for besides providing students with opportunities to learn to select the appropriate features of their repertoire to meet the communicative

exigencies of the social situation at hand (and to suppress other features of their repertoire), bilingual education must also provide students with opportunities to fully use their entire language repertoire, without regard to the socially and politically defined boundaries of named languages and the ideologies of language purity that accompany them.

Minoritized languages must be protected and developed if that is the wish of people. But it is important to understand that the linguistic features that make up that minoritized language cannot be totally isolated from others because they are generally part of the linguistic competence of bilinguals. Bilingual education cannot maintain minoritized languages as if they were autonomous museum pieces; instead it can only help *sustain* and develop them in functional interrelationship within the communicative context in which they are used by bilingual speakers.

For bilingual education programs to both offer a fairer and more just education to bilingual children and sustain minority language practices, it is important that they combine the weak and strong versions of translanguaging theory. On the one hand, educators must continue to allocate separate spaces for the named languages although softening the boundaries between them. On the other hand, they must provide an instructional space where translanguaging is nurtured and used critically and creatively without speakers having to select and suppress different linguistic features of their own repertoire. Only by using all the features in their linguistic repertoire will bilingual students become virtuoso language users, rather than just careful and restrained language choosers. Only by assessing bilingual students on the full use of their linguistic repertoire – their ability to express complex thoughts effectively, to explain things, to persuade, to argue, to give directions, to recount events, etc. – and not simply on a set of lexical and structural features, will we understand their capacity for meaning and for achieving.

The Future

As always, translanguaging practices will continue to be present in bilingual classrooms, sometimes surreptitiously and other times out in the open. Translanguaging offers many advantages for a multilingual future, for by taking the perspective of the individual speaker, and not that of the state, bilingual users are freed from the strictures that keep us from understanding each other and from discovering the common features in our language repertoire and those held by others. The linguistic flexibility posed by a translanguaging perspective means that individuals will be able to more openly appropriate linguistic features and make them their own, rather than linking them to a particular language or state.

But translanguaging in education sometimes contradicts the regulatory role of schools. Bilingual educators must decide whether to always accept the regulations imposed upon bilingual students that restrict them as two monolinguals or to find spaces to liberate their tongues and minds. Only then will bilingual education be truly able to assist bilingual students to choose intelligently when to select or

suppress certain features of their repertoire and when to liberate their tongues, their full language repertoire, along with their minds and imagination.

Related Articles in the Encyclopedia of Language and Education

- Angel Lin: [Code-Switching in the Classroom: Research Paradigms and Approaches](#). In Volume: Research Methods in Language and Education
- Feliciano Chimbutane: [Multilingual Resources in Classroom Interaction](#). In Volume: Multilingual Resources in Classroom Interaction
- Judith Green: [Classroom Interaction, Situated Learning](#). In Volume: Discourse and Education
- Kate Menken: [Language Policy in Classrooms and Schools](#). In Volume: Language Policy and Political Issues in Education
- Li Wei and O. García: [From Researching Translanguaging to Translanguaging Research](#). In Volume: Research Methods in Language and Education
- D. Gorter, J. Cenoz: [Linguistic Landscape and Multilingualism](#). In Volume: Language Awareness and Multilingualism

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Signed Languages in Bilingual Education

Sangeeta Bagga-Gupta

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Abstract

The glossed concepts bilingual/ism and bilingual education (BE) have been recognized as being simplistic and misrepresentative of the complex, diverse human behaviors that they index. Moving beyond colonially framed monolingual, monoglossic understandings of bounded language systems and recognizing the fluid nature of languaging where more than one language variety, modality, and other resources constitute routine human communication, this chapter presents the place of signed languages (SLs) inside and outside education, as well as social life across time and space. It traces salient developments as well as the erasure and hegemonies related to the position accorded to different language varieties and modalities inside and outside deaf education (DE). This chapter identifies and accounts for the place and meaning of SLs in BE broadly and DE specifically. In addition to presenting an overview of the binary divisions (related to oralism/signing, deaf-normal/hearing, segregation/integration) that have plagued the field as well as research in the domain DE for over a century, this chapter highlights the establishment of a third position in terms of the place and

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space that is accorded to SLs both across time and space generally, and in BE and in DE research specifically. Significant issues that continue to frame the education and the situation of deaf children and adults and specific paradoxes in the areas of both education and research are up-fronted. The chapter presents key directions for future research taking cognizance of recent discussions in the language and learning sciences more generally.

Keywords

Signed languages • Deaf-hearing connectivity • Linguaging • Multidisciplinary research • Chaining • Third position • Visually oriented bilingualism • Deaf education • Inverted inclusion • ICED • Cochlear implants • Research ethics

Introduction

The terms *bilingualism* and *bilingual education* (BE) have been recognized over time as being simplistic, if not misrepresentative of the complex and diverse set of human behaviors that they index (Baker 2011; García 2009; Grosjean 1982). A concern here relates to moving beyond dominating (colonially) framed monolingual, monoglossic understandings of bounded language systems, to recognize the fluidity inherent in languaging and translanguaging, including multimodalities that comprise the heteroglossic nature of human communication (Blackledge and Creese 2014; Hasnain et al. 2013; García 2009; Linell 2009). In addition, different BE models like two-way bilingual programs, content- and language-integrated programs, plurilingual/multilingual programs, segregated programs, etc., are ideologically framed sites of contestation and are not uncommonly connected to academic fields of expertise in either the language sciences or the education sciences. This means that the institutional activity system of BE is often seen as an extension of the theoretically framed domain in research called BE (Bagga-Gupta 2012).

Different signed languages (SLs) have also been, and continue to be, framed in simplistic/reductionist terms in both the popular imagination and in some dominating scientific domains. Different SLs have evolved and exist in different communities where large numbers of members are deaf (Groce 1985), in a similar fashion as different oral languages have evolved in hearing communities. In other words, SLs are, at least since the 1960s, recognized within science and, since the 1990s in national policy contexts, as unique human languages, similar and just as complex in their makeup as oral/articulated languages (OLs). Five types of cheremic unit variation in SLs, similar to phonological variation in OLs, are recognized: handshapes, sign location, palm orientation, movements, and nonmanual embodied features. While SLs are often denied recognition and continue to be contested in policy as well as in some scientific domains, they have existed in different formats in communities worldwide, and especially so within deaf education (DE) even in institutional settings where they have been formally forbidden.

This chapter aims to identify and account for the place and meaning of SLs in BE broadly and DE specifically. While I will give an account of the field, I will steer

clear of the binary hegemonic ideologies that have continued to frame understandings related to SLs on the one hand, and BE, including DE on the other. Using brush strokes across the canvas (rather than specific areas on the canvas or individual colors or lines), my aim here is to trace salient developments and make visible the multiplicity of mainstream academic domains that contribute to and intersect in the field *SLs in BE*.

Developments: The Place of SLs in Education Across Time and Space

Recognition of the existence of groups and communities that use/used a specific SL predates the academic and/or political recognition awarded to specific “national” SLs in terms of a natural human language. The former include descriptions of the communicative repertoires in, often isolated, communities on islands, or remote areas (Fox 2007; Groce 1985; van Cleve and Crouch 1989). The latter saw academic recognition accorded to American Sign Language (ASL) in terms of a “real” language in the 1960s (Bauman 2008; Maher 1996). In the decades that followed, linguistic work emerged in different parts of the world with the aim of “codifying” SLs in national contexts and it is only in the last two decades that political recognition has been awarded to a dozen or so SLs in the world. While some SLs like Finnish Sign Language (FinSL), Uganda Sign Language (USL), and Venezuelan Sign Language (VSL) have been awarded the status of national minority languages in their respective nation-states, others like ASL, Norwegian Sign Language (NSL), and Swedish Sign Language (SSL) have been awarded recognition in terms of “languages of instruction,” primarily for the deaf.

European-American narratives dominate the accounting of the development of institutionalization of DE, including BE where the second half of the 1700s sees schools being set up for deaf children of the rich and the poor in France. Individualized or small group education of deaf children of the rich, emerged in Europe earlier in the 1500s with the aim of teaching them to speak orally, in addition to learning reading and writing. The experimentation of the teaching of groups of deaf where signing was privileged in France (by a teacher of the deaf, Abbé de l’Épée) is taken to the USA in the early 1800s by a hearing North American (Thomas Hopkin Gallaudet). In addition to learning about the model there from a hearing teacher (Abbe Sicard), Gallaudet brings back to North America a deaf French SL teacher – Laurent Clerc. ASL is accounted to have emerged from the local SL in conjuncture with the imported French Sign Language (LSF, langue des signes française). Of interest for present purposes is the fact that the ASL-American English model of teaching that emerges is termed “signing,” rather than “bilingualism.” Deaf and hearing teachers learn ASL and the use of two languages in DE spreads across the continent. Another point to note here, and one that is often erased in discussions of SLs in DE, is the close hearing-deaf collaboration that allows for the setting up of LSF-French schools and later ASL-American English schools in different spaces during the 1700–1800s.

The end of the 1800s sees the place of SLs in deaf BE explicitly marginalized when the second *International Congress on Education of the Deaf* (ICED) in Milan passed a motion condemning signing (van Cleve and Crouch 1989; Lane et al. 1996). However, its place in DE was considerably undermined already at the first ICED in 1878 in Paris. Significantly, the first two congresses were organized by proponents of the “oral method of teaching in DE.” The following resolution was adopted at Paris in 1878:

The Congress, after mature deliberation, is of the opinion that, while the use of signs with all deaf-mutes should be retained as an aid in instruction and as the first means of communication between teacher and pupil, preference should be given to the method of articulation and lipreading, which has for its purpose the restoration of the deaf-mute to society. (Fay 1879, p. 57, in Brill 1984, p. 14)

Reflecting upon this resolution, Brill states two issues that are important: firstly that the “oral/articulation versus manual/signing controversy” began with the passage of this resolution in 1878 and secondly that teachers advocated “teaching speech to all deaf children and simultaneously using manual communication as an important means of communication with deaf children” (1984, p. 14). The 1880 congress adopted resolutions that were harsher toward signing:

considering the incontestable superiority of speech over signs, (a) for restoring deaf-mutes to social life, and (b) for giving them greater facility of language, . . . the method of articulation should have preference over that of signs in instruction in education of the deaf and dumb. Considering that the simultaneous use of signs and speech has the disadvantage of injuring speech and lipreading and precision of ideas, . . . the oral method should be preferred. (Gallaudet 1881, p. 12, in Brill 1984, p. 20)

The hegemony of the oral method continues well into the second half of the 1900s. Presentations that support “total communication as a philosophy of education” emerged first at the 13th ICED in 1970 (Brill 1984, p. 247). The combined use of signing and talking, i.e., “total communication” (TC), thus becomes reestablished nine decades after signing was banned in DE.

The congresses of 1975 and 1980 saw a small but important rise of deaf participants at ICDE.

Deaf people played a much greater role in [1980 at the 15th] congress than in earlier congresses [and] for the first time interpreting was scheduled as part of the structure of the congress . . . in the German Sign Language, Scandinavian Sign Language, and American Sign Language. (Brill 1984, p. 388)

The most recent ICED in Greece (2015) witnessed an increase in deaf participants. Reports and discussions in social media forums and after the congress highlight concerns related to accessibility of the program in different SLs. Professionals, rather than scholars, make up the participants at the ICED’s (Brill 1984). Significantly also, the 1980 congress at Hamburg recognizes the role that the first two congresses (in 1878 and 1880) had had in DE worldwide, decreeing that it is not

ICED's role to pass resolutions. The 2010 ICED in Vancouver, sees "a long-awaited sweeping repudiation of the 1880 Milan ICED resolutions" wherein a "Statement of Principle and Accord for the Future" titled "A New Era: Deaf Participation and Collaboration" is presented. This rejects and expresses "deep regret for the detrimental effects of the Milan resolutions" and also promotes "acceptance of and respect for all languages and forms of communication in educational programs" (<http://wfdeaf.org/news/international-congress-of-the-deaf-iced-july-18-22-2010-vancouver-canada>). The *New Era* statement emphasizes the need for working with national governments, highlighting the United Nations Convention on the Rights of Persons with Disabilities that decrees SLs as "a human right," especially in education, which should include "full acquisition of language, academic, practical and social knowledge" (<http://wfdeaf.org/news/international-congress-of-the-deaf-iced-july-18-22-2010-vancouver-canada>). Other 2010 ICED statements endorse the following resolutions adopted by the World Federation of the Deaf at its 15th Congress in 2007:

equal and appropriate access to a multi-lingual, multi-cultural education; inclusion of Sign Languages as legitimate languages equal to the nation's spoken languages; the inclusion of Deaf people in all aspects of education from the very onset; and the promotion of human rights for all (<http://wfdeaf.org/news/international-congress-of-the-deaf-iced-july-18-22-2010-vancouver-canada>).

Two further relevant dimensions regarding developments vis-à-vis the place of SLs in education relate to (i) technologies and (ii) signing for hearing individuals, e.g., for babies, for children with cognitive disabilities and in "foreign language" college courses. Technology plays an important role in the lives of deaf people generally, and in DE specifically (Holmström 2013). The dominance accorded to oralism at the end of the 1800s allows audiologically oriented technologies to become relevant for augmenting language acquisition in DE. Understandably then, advances in hearing technologies like outer-ear hearing aids (1950s onwards) and inner-ear aids, i.e., cochlear implants (latter parts of the 1900s onwards), have, in medical/technological research quarters, been heralded as "cures that can eradicate deafness" (Blume 2010; Thoutenhoofd et al. 2005). Equally potent counter stances, taken by cultural/linguistic factions within science as well as professionals and community proponents of signing, include the assertion of a discourse of "deafhood" where the medical/technological eradication discourse gets framed as "linguistic-cultural genocide" (Ladd 2003; Skutnabb-Kangas 2000).

While the place of SLs continues to be contested in DE and different models of deaf BE exist, there has been a paradoxical surge of interest in and growth of signing programs available for hearing babies since the late 1980s (http://sign2me.com/index.php?option=com_content&task=view&id=17&Itemid=33). Here the role of "early signing" is accounted for in terms of enhancing the general language and cognitive development of hearing children. A similar paradoxical popularity has been noted in the ASL as "foreign language" option available to hearing college students in the USA. Furthermore, the use of a range of manual signing systems (like signed speech, signed support systems, alternative and complementary communication systems) is deployed in the education of hearing children with a range of

cognitive disabilities (http://sign2me.com/index.php?option=com_content&task=view&id=17&Itemid=33).

Some important issues of relevance emerge when discussing developments and the position of SLs in education, including DE across time and space. *Firstly*, different SLs have always existed in and around DE irrespective of the explicit oral/articulation, manual/signing, or variations of TC models in place in schools or deaf teacher education (Domfors 2000; Jankowski 1997). *Furthermore*, religion, philosophy, and science have played important roles in prescribing “what language is” in the domain of DE (Bagga-Gupta 2004a; Baynton 1996; Domfors 2000; Lane et al. 1996). Thus, oral communication is, across time, collated as being “true” language, and SLs have been marginalized and even forbidden. *Thirdly*, the pursuit of best models and pathways to literacy for the deaf frames both (i) the organization of DE and (ii) a dichotomized research field where either an oral education or a signing-based instructional model is pushed (Bagga-Gupta 2004a; Powers et al. 1998). *Fourthly*, a fairly consistent pattern exists across time in that the binary hegemonies vis-à-vis language and educational placements/organization for deaf children play an important role in DE and research in DE (Bagga-Gupta 2004a, 2007; Paul and Moores 2010). *Finally*, the labels deployed in DE can be misleading: titles of programs and models across time may not always correspond to the languaging or communicative-practices in those models (this is also an important caveat in research in DE) (Powers et al. 1998). Thus, for instance, signing instructional models are the equivalent of BE, but may not be labeled as such, and what is called “bilingualism” in DE differs across time and space. “Bilingualism” gets discussed at the 15th ICED in 1980 in terms of deaf immigrant pupils’ “additional” languages rather than an SL and the dominant language of the nation-state (Brill 1984). In some instances deaf bilingualism is represented in terms of an SL and only the written modality of the dominant societal language is included (Bagga-Gupta 2004a).

Major Contributions and Work in Progress: The Establishment of a Third Position

A dichotomized philosophy frames shifts in the ideologies related to language in DE where the importance of oral communication (often termed as the technical/medical perspective; henceforth *Position 1*) is pitted against the importance of visibility and manual- or signing-based communication (often termed as the linguistic or cultural/linguistic perspective; henceforth *Position 2*). This binary division can, as the previous section highlights, be more fruitfully conceptualized in terms of a heterogeneous and diffuse *continuum*, not least (i) given the various artificial sign-systems based upon oral language that continue to frame DE, and (ii) the non-clarity regarding the labels used for communication and the languaging in different DE models as well as in research on these models (Powers et al. 1998). Thus the oral-manual historical swings – i.e., Positions 1 and 2 – not only push an ideologically framed organization of DE but also the domain of research in DE wherein “we [researchers] have an obligation to place serious question marks [on] the validity of

results regarding language ability, be it spoken, signed or written” (Powers et al. 1998, p. 33; Bagga-Gupta 2004a, 2012). Significant scholarly contributions and current work in the field SLs in BE go beyond this dichotomy and include themes such as recognition of SLs, language socialization in deaf families, sociolinguistic practices in DE, and technologies in DE.

The previous section lays the basis for understanding both the general state of research in the field of SLs in BE as well as the first theme (i.e., recognition of SLs) regarding major contributions in the field. Studies by William Stokoe in the late 1960s are accredited with both paving the way for investigations that enabled ASL (and subsequently other SLs) to be viewed as a language in its own right (Maher 1996; Stokoe et al. 1965; Suppalla and Cripps 2008). While continuing efforts in science that “codify” SLs is related to demands for their political recognition, the parallel emergence of newer research traditions during the last two and a half decades is significant.

While Position 2 agendas push for securing political recognition of *nationally framed homogenous* SLs, an emerging concern in the literature highlights the erasure of different SL varieties as a direct result of these standardizing processes. Such newer research goes beyond an endorsement of SLs in terms of “true” languages, and de facto broadens their recognition. This means that Position 1 scholars (who may continue to deny the linguistic status of SLs) may operate on the same university campuses as both Position 2 scholars (who may be closely involved in political struggles for the recognition of a national SL with deaf activists) as well as scholars working in mainstream science, not infrequently in multidisciplinary projects where the working languages include a specific SL. The perspectives of these latter *mainstream* scholars and their research can, for present purposes be called a (new) *Position 3*, not least since this emerging body of work goes beyond issues of “what language is,” “best models” for language acquisition in DE, and the “Great Divide” in DE (Bagga-Gupta 2007). These researchers merely get on with mainstream academic scholarship, focusing upon what Stokoe (in Volterra and Erting 1994:vi) calls “real data.” Historically framed research, demographic research, and research on languaging (rather than the labels of educational programs or peoples accountings of the same) both inside and outside institutional DE comprise domains that are interesting and that contribute to a Position 3 perspective.

While recognition awarded to SLs since the 1960s, politically as well as academically, gives rise to discourses wherein deaf individuals become represented as members of unique minority groups with unique visual languages and gradually paves the way also for the emergence of a new discourse on “ethnicities” and deaf bilingualism, a large thrust of this work gets framed within Position 2 agendas.

Position 3 research emerges from the 1980s onwards. Here empirically grounded emic notions emerge that upfront the visual nature of languaging, such as “language acquisition by eye” (Chamberlain et al. 2000) and “visually oriented bilingualism” (Bagga-Gupta 2004b), as well as the intertwined nature of oral-written-signed bilingualism through concepts such as “‘sandwiching’, ‘chaining’, ‘chaining structures’ and ‘linking’” (Bagga-Gupta 2004a, p. 223). The latter represent the bilingual patterned use of SLs and a dominant societal language inside and outside DE settings

where deaf and hearing caretakers and professionals live and work (Lane et al. 1996; Padden 1996). Historically framed research accounts of the languaging in entire communities comprised of deaf and hearing individuals where an SL together with a spoken/written language was/is in use also contribute to understandings of issues of access and marginalization. This small body of research accords de facto recognition to SL and deaf-hearing connectivity in society. Presenting one such classical research account, Groce uses an “ethnohistorical approach” (1985, p. 5) to describe the situation in Martha’s Vineyard, an island in Massachusetts, US, highlighting that in most societies, a

deaf person’s greatest problem is not simply that he or she cannot hear but the lack of hearing is socially isolating. . . . On the Vineyard, however, the hearing people were bilingual in English and the Island sign language. This adaptation had more than linguistic significance, for it eliminated the wall that separates most deaf people from the rest of society. How well can deaf people integrate themselves into the community if no communication barriers exist and if everyone is familiar and comfortable with deafness? The evidence from the Island indicates that they are extremely successful at this. (Groce 1985, p. 4)

This Position 3 normalcy accorded to deafness is significant since instead of being disabling, it becomes merely one of many human traits of difference. Going beyond the two DE models of segregation and mainstreaming, this perspective allows for the conceptualization of an “inverted inclusive” DE model where both deaf and hearing children participate in an education delivered through an SL and a majority language. This also resembles (perhaps for the first time), the membership in the research teams focused in this section: this deaf-hearing partnership resembles the linguistic repertoires of the “bilingual” settings that are themselves under research scrutiny. Here deaf and hearing membership becomes the inclusive given, allowing for “a journey into the DEAF-WORLD” (Lane et al. 1996).

Not only is explicit recognition accorded to the fact that deaf and hearing human beings coexist in different institutionalized settings in societies, but more significantly recognition is accorded to the fact that membership of Deaf spaces is not and cannot be understood as being constituted along audiological lines. (Bagga-Gupta 2004a, p. 239)

While historical accounts and research on the everyday lives or the languaging of deaf and hearing people both inside and outside school settings surfaced in the 1980s, it continues to be marginal in the DE research arena. The collection of studies brought together in Volterra and Erting (1994) offers insights for the first time into not just the early communication of deaf and hearing young children acquiring SLs but also juxtaposes this with the early communication of hearing children acquiring OLs. This research highlights the inseparability of language from social interaction, including the close medley between gestural and vocal behaviors during the first few years of life. This close symbioses between different modalities (signing, written, oral language) and language pairs (ASL-American English, SSL-Swedish, NSL-Norwegian) gets conceptualized as linking or chaining and emerges as a small theme in the DE as well as the BE literature from North America, as well as Scandinavia, at the turn of

the century. Individual ethnographically framed studies of parent's languaging with infants (Andrews and Taylor 1987), case-studies of individual deaf and hearing children and/or deaf families in home and school settings (Blumenthal-Kelly 1995; Cramér-Wolrath 2013; Erting et al. 2000; Ewoldt 1991; Johnson and Erting 1989; Maxwell 1984; Padden and Le Master 1985) make available important insights regarding the linking and chaining between SLs and dominant societal languages. Ethnographically framed case-studies of individual teachers, classrooms, and schools in DE, primarily in the USA but also in Scandinavia, highlight issues of access including a significant dissonance with regard to deaf children's access to visual language even where manual systems of signing are used in conjecture with oral (and written) language (Bagga-Gupta 2002; Bailes 2001; Erting 1994, 2001; Hansen 2005; Padden 1996; Ramsey 1997; Tapio 2013, 2014).

Different deaf bilingual models have emerged in educational contexts where SLs play contrastingly different roles. In some settings variations of SLs based upon the dominating oral language are deployed, in others a "pure" SL is used parallel with the written and oral modalities of a dominating societal language, and in yet others, a "pure" SL is used parallel with a delayed introduction of only the written modality of a dominating societal language (Bagga-Gupta 2004a). While research on the use of SL interpreters within DE is almost nonexistent (Hansen 2005), Prinz and Strong (1998), in an overview, present five different approaches that bridge "the gap between ASL and written English within a bilingual framework" (1998, p. 55). For present purposes, what is relevant is the fact that these types of studies highlight the emergence of a new nonnormatively pushed discussion in a field which has long seen a dichotomized prescriptively framed agenda.

Discussing three different types of technologies in DE – audilogically oriented, visually oriented and tactile oriented – Holmström (2013) suggests that visually oriented, rather than audilogically oriented, technologies tend to be not only successfully deployed by deaf pupils and individuals but that their uptake in the "Deaf World" is quicker as compared to the hearing world. Furthermore her research in Sweden shows that (i) currently almost all deaf infants are implanted and are mainstreamed in Sweden and that (ii) audilogically oriented and communicative-link technologies both support, but also limit, these pupils' participation in mainstream education. Meta-research on the situation of cochlear implant recipients in education seems to suggest that while increased attention is being paid to specific outcomes (e.g., related to oral production) in the lives of implanted children, there is almost no research either on the impact of these technologies in broader social situations or on their impact over time (Blume 2010; Paludnevičienė and Leigh 2011; Thoutenhoofd et al. 2005).

Problems and Difficulties

It is striking that SLs continue to be ignored in the twenty-first century in overview articles and books that focus upon the linguistic ecologies of different communities, nation-states, or language in education. It can be reiterated that while many Position

2 scholars as well as activists continue efforts toward recognition of “national” SLs, this has created homogenized national “imagined communities” of deaf people (compare Anderson 2006), with the result that local community SLs are marginalized, and SLs have become “the property of deaf people,” thus eclipsing the deaf-hearing heterogeneity and the richness of the “many ways of being deaf” (Bauman 2008; Monaghan et al. 2003) in the “Deaf World.”

Furthermore, the organization of DE, and more fundamentally research into DE, continues in large measure, in the twenty-first century, to be pushed by representations of and framed by the guiding principles of oralism (Position 1) and manualism (Position 2). Some important points can be highlighted from these two issues: *firstly*, SLs are not made visible in the *family of languages* by scholars in the language and educational sciences themselves (see, for instance, chapters on the languages in different parts of the world in this volume). *Secondly*, SL and DE as institutional systems as well as research endeavors continue to live parallel lives *outside* mainstream discussions in science, including bilingual studies on the one hand and the educational sciences on the other. *Thirdly*, while SLs have recently become popular in early signing programs for language acquisition of hearing infants and as a “foreign language” for college students (particularly in the US), paradoxically the majority of deaf infants, including implanted infants, and deaf young people continue to be denied access to SLs. *Fourthly*, while models of DE have been, and currently are, conceptualized in different parts of the world in terms of oralism, manualism, TC, etc., there is a continuing paucity of research on the languaging in these educational settings. *Furthermore*, while near total-population implantation on deaf babies is reported in some countries since the turn of the century, there is a glaring paucity of knowledge based upon (a) longitudinal research on general languaging outcomes (Thoutenhoofd et al. 2005) and especially (b) on the communicative practices in educational settings the implanted children find themselves in, across time in both mainstreamed and segregated settings (Holmström 2013). Significantly, demographic data on these populations is conspicuously missing in many nation-states. *Finally*, while access to formal education for children, including deaf children outside the global North continues to be highly problematic (Haualand and Allen 2009), access to the curriculum for deaf children worldwide continues to be an issue, given the marginal place of SLs in education broadly. As Martin (1990) has said:

When you read educational research results [in the area of DE] you sometimes come away feeling, ‘What do we really know?’ and ‘How much we don’t know yet’. Results are confusing and conflicting and contradictory. (p. 32)

These words from a quarter of a century ago hold currency even today. The parallel lives that research into SLs and DE, as well as the parallel segregated schooling of deaf children – be it in an oral or a signing environment – needs to be highlighted as a major dimension of the difficulties and confusions that continue to frame the role that different languages play in the education of children with, and those without hearing disabilities. Using the labels of the DE programs as the

equivalent of the social practices, particularly the languaging in those programs is analytically problematic.

Future Directions

The continuing dominance of Positions 1 and 2 in DE can be exemplified and also understood by (i) the continuing domination of hearing scholars and professionals in the field of DE and (ii) the message in the following quote from the classical book, “Everyone here spoke sign language”:

Even if the deaf person knows sign language, only a very small percentage of the hearing population can speak it and can communicate easily with deaf people. The difficulty in communicating, along with the ignorance and misinformation about deafness that is pervasive in most of the hearing world, combine to cause difficulties in all aspects of life for deaf individuals – in education, employment, community involvement, and civil rights. (Groce 1985, p. 4)

Future directions for research on the role of SLs in BE need to both leave behind the “great divide” in DE and turn toward a Position 3 agenda where the focus is on (i) studying a range of issues from historical data, e.g., the ways in which deaf-hearing connectivity gets played out in communication, at work, in the “Deaf World”; (ii) demographics of deaf pupils, including deaf implanted pupils across educational settings; and (iii) the communication practices in different DE models. Tweezing out the relationship between experiences with SLs and the role they play in BE, including DE, needs to be attended to in scholarship, as does the relationship between language practices in education and children’s cognitive development (Marschark et al. 1997).

More recent multidisciplinary research on the history of technologies in DE (Blume 2010; Holmström 2013) and work on the languaging in settings where SLs and dominant languages are in use by scholars in North America and Scandinavia highlight the heterogeneity of communication practices of relevance for BE more broadly. Furthermore recent works by Erting and Padden and their colleagues and by Singleton et al. (1998) have highlighted that while fluency in an SL is important for the general well-being of a deaf child, proficiency in an SL does not automatically give pupils access to the dominant societal language. These, often single research projects, need to be consolidated in larger programs in mainstream science where longitudinal studies are carried out (against the backdrop of demographic studies) of (i) implanted children in mainstream educational settings, (ii) hearing and deaf children’s educational trajectories in “inverted inclusive” educational settings where SL is a language of instruction (these resemble societies where everyone uses SLs) (Groce 1985), and (iii) families and settings where two or more SLs and two or more spoken/written languages are used.

Present-day evidence from Positions 2 and 3 implies that an important future direction needs to build upon SLs as languages in their own right so that the analytic

focus lies on communities where an SL is used by individuals – deaf (with or without implants) and hearing – in different arenas. “Inverted inclusive” school environments where deaf and hearing pupils and adults are members and where SLs are used in BE constitute examples of such arenas (Teruggi 2003). Taking discussions of the situation in a community like Martha’s Vineyard where no communication barriers existed (Groce 1985) as points of departure, one can raise the following query: what types of issues emerge when deafness is not a criteria for inclusion in a BE model and where a specific SL is a language of instruction for both deaf and hearing pupils? Mapping school environments in terms of such communities where barriers for deafness have been eroded is one important way of going beyond the “Great Divide” that has framed DE for a couple of centuries.

Another important future direction can be framed in terms of ethics *of and in* research. The continuing paucity of deaf scholars and professionals in the field of DE and BE is regrettable (Padden and Humphries 2005) and comprises an important dimension of a politics of recognition. Furthermore, the involvement of industry in the field of cochlear implants and DE and their partnership with Position 1 scholars needs to be scrutinized and framed within research ethics endeavors. Thus, in addition to the multidisciplinary of the research enterprise, the field of *SLs in BE* needs to be mainstreamed into science where ethical framings are highlighted.

Cross-References

- ▶ [Bilingual Education Policy](#)
- ▶ [Bilingual Education: What the Research Tells Us](#)
- ▶ [Key Concepts in Bilingual Education](#)
- ▶ [Sign Bilingualism in Deaf Education](#)

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Biliteracy and Multiliteracy in Bilingual Education

Diana Schwinge

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Abstract

One explicit goal of most bilingual education is for students to become biliterate. For the purposes of this review, biliteracy will be defined as “any and all instances in which communication occurs in two (or more) languages in or around writing” (Hornberger NH, Teach Coll Rec 92(2):212–229, 1990). This chapter first examines the early work in the 1980s and 1990s that established biliteracy as an important topic for research and then reviews major theoretical contributions in the development of our understanding of biliteracy including the concepts of hybridity, pluriliteracy, multimodal literacy, and the continua of biliteracy. Important venues for biliteracy including emergent biliteracy in early childhood, biliteracy in two-way immersion programs, and the development of biliteracy

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through the study of literature and the biliteracy workshop are examined. Then, the chapter explores the recent focus in the field of biliteracy on the concept of translanguaging. Finally, the chapter reflects on challenges that need to be further researched within the field of biliteracy. These challenges include the fact that many teachers who support biliteracy are not fluent in the languages of their students or familiar enough with their multicultural backgrounds in order to assist their students in effectively achieving a high level of biliteracy. Also, macro language policies may negatively impact the implementation of bilingual education and the development of biliteracy in individuals and communities. In addition, the needs of various populations such as high school emergent bilinguals and students with special needs are often not considered by researchers of biliteracy.

Keywords

Balanced literacy • Dual language bilingual programs • Emergent literacy • Funds of knowledge • Hybridity • Literacy practices • Translanguaging

Introduction

As globalization and language contact has increased, the study of biliteracy, communication that occurs in two or more languages in or around writing (Hornberger 1990), has become increasingly important. The research that is reviewed in this chapter discusses how biliteracy can be acquired, the use of biliteracy as an educational resource, and formal models for analyzing biliteracy. Whether biliteracy is acquired at home, in the community, or at school, the studies cited in this review show that biliteracy can be used as a resource for communication, participation, and learning.

Early Developments

Early research in the development of biliteracy in educational environments focused primarily on the impact of the way that participation is organized within a classroom setting and the variety of ways in which multiple languages can be acquired and used as a resource for personal expression and instruction within bilingual classrooms. In the early 1980s, key research was done in a variety of cultural settings that showed that different communities had varying oral and written participation styles, and instructional effectiveness could be improved by drawing on participation styles that were congruent with minority students' cultural background. For example, in Hawaii, the staff of the Kamehameha Elementary Education Program showed that reading lessons that were organized in a way that was similar to the traditional Hawaiian talkstory discourse structure increased student participation and reading scores (Au 1980). Research on classroom participation structure on the Warm

Springs Indian Reservation showed that students were more likely to be viewed as competent at tasks when they were able to participate in ways that were congruent with their community ways of interacting such as working cooperatively, learning through completing activities physically and through observation, and minimizing oral corrections (Philips 1983). These early research studies of the variety of participation patterns among minority communities in English-speaking environments influenced similar studies of students acquiring biliteracy in bilingual education programs.

While bilingualism is often viewed by schools as a problem, in the 1980s a number of key studies showed that bilingualism and biliteracy could also be viewed as a resource to aid classroom learning. In one groundbreaking study, Moll and Diaz (1985) discovered that students in different level reading groups in Spanish were all placed in the same low-level English reading group. The researchers decided to change the teaching methods that were used in the English reading class to see if the students could understand the fourth-grade reading book in English. First, they initially read the story to the students orally rather than having the students read the story independently. They also occasionally discussed the English stories with the students in Spanish or translated key vocabulary words for the students. Their work showed that these students were able to understand the fourth-grade reading texts when their home language was used to support their English literacy skills. In another study, Edelsky (1986) conducted research into first- through third-grade students' writing development in an English/Spanish bilingual program. Her work challenged the myth that bilingual students become confused when developing biliteracy in two languages. Instead, she found that there was considerable transfer of writing skills between languages, and the use of two languages increased the students' options for communicating in an expanded range of texts to multiple audiences. Similarly, in a study of bilingual Spanish/Quechua schools in rural Peru, Hornberger (1988) found that the use of the students' indigenous language in schools had several advantages. Students in bilingual schools were able to participate more and write original sentences in class, instead of merely copying from the board as was characteristic of Spanish-only classrooms. In addition, in content area studies such as math, teachers in the bilingual classroom were more likely to explain to students how to do cognitively difficult problems. These early studies on biliteracy in bilingual classrooms were important in dispelling the myth that learning two languages would cause students difficulties in learning to read and write. These studies were the beginning of what has been an ongoing exploration into the possibilities that are available when two languages are used for classroom instruction.

Traditionally, schooling has primarily drawn upon a restricted body of academic knowledge and literacies, but research in the 1990s suggested that the knowledge that students gain from participation in the families and communities can also be successfully used as a basis of literacy learning in school. Moll et al. (1992) call the knowledge that is utilized in order to maintain functioning households and communities "household (local) funds of knowledge." This knowledge includes information about a variety of topics including agriculture, economics, household management,

medicine, scientific knowledge, and religion. Research suggests that utilizing community knowledge allowed students to participate in activities and produce written products that they would be unable to produce if they were forced to utilize only traditional academic knowledge in completing their assignments. Second, drawing on local funds of knowledge allows parents to participate more fully in their children's education. Third, when the students observe that the local funds of knowledge in their community are drawn upon in a formal setting such as the school classroom, it can help students to develop a more positive self-image and to value the languages and knowledge that is taught to them in their homes and communities.

Major Contributions

This section describes several major contributions to our understanding of the conceptualization of biliteracy and multiliteracy within bilingual programs. First, some research has focused on adapting major concepts from the social sciences to the analysis and formulation of effective literacy events in bilingual classrooms. One of the major contributions of this line of research includes studies that show how the principled use of hybrid linguistic codes, semiotic modalities, and participation structures can aid bilingual students' development of biliteracy and content knowledge. Second, another major contribution to the field is the creation of a general framework for analyzing biliteracy that can be used as a model for analyzing teaching, research, and language planning in multilingual settings. A third major contribution has been made by researchers who have written texts that give extensive examples of the types of practical teaching strategies that can be used in a classroom setting to help students develop biliteracy.

Hybridity, Pluriliteracy, and Multimodal Literacy

One major concept in the development of biliteracy is that while it may be considered the norm in most classrooms to draw upon one linguistic code, semiotic modality, or participation structure at a time, it is also possible for these ways of making meaning to be combined and mixed in a single literacy event. This mixing can be referred to as "hybridization" or "hybrid literacy practices." This mixing in bilingual classrooms is principled, purposeful, and organized. In diverse communities, interculturality and cultural flows give rise to polylingual practices and polycultural modes of expression. Multimodal literacy, making meaning through visual, audio, and spatial semiotic systems, often through the use of electronic technologies, is also an important part of biliteracy. The combination of multilingual literacies with multimodal means of expression is sometimes referred to as "pluriliteracy practices" (García et al. 2007).

One important example of hybrid literacy practices is the analysis by Gutierrez et al. (2011) of the uses of biliteracy in an after school program in California. Their research describes how elementary school students describe their activities, interests,

life experiences, and learning in daily e-mails to a fictional bilingual character, “El Maga.” The undergraduate students who answer these e-mails purposefully use both Spanish and English in a strategic way to help the bilingual students develop their literacy skills in both languages, improve their ability to communicate through electronic means using linguistic and graphic means, and develop a strong bond with “El Maga.”

Continua of Biliteracy

Another major contribution to the conceptualization of biliteracy is the creation of a general framework that can be used across contexts. The continua of biliteracy is a framework that can be used as a model for analyzing teaching, research, and language planning in multilingual settings. The framework has been described in great detail and applied to many different educational situations in an edited volume (Hornberger 2003). The framework is composed of four nested set of continua, each of which captures a significant aspect of the learning contexts that are essential for developing biliteracy including the media, context, development, and content of biliteracy. Each continuum consists of weaker and more powerful ends, and the continua thus recognize that all modes of expression and types of knowledge are not viewed as equally powerful by society. However, the model suggests that the more the learning context allows learners to draw from across the whole of every continuum, the greater the chances for the full development of biliteracy.

Emergent Biliteracy

Recent studies carried out on emergent biliteracy in early childhood education have also contributed to our theoretical understanding of the early development of biliteracy. Many studies of preschool learners examine their development of biliteracy in home and community as well as school environments. For example, Reyes and Asuara (2008) have researched emergent biliteracy in Mexican immigrant preschool children who are growing up in bilingual communities in Arizona. They primarily observed children in their home environments and discovered that young children were already learning the differences in the sound–letter correspondences between the two languages and were aware of key differences between writing in the two languages, such as the use of accent marks in Spanish. The study also showed how a major function of biliteracy among these children and their parents was to use Spanish to interpret English printed material in the children’s environment. These findings are supported by studies by Kenner et al. (2004) that have found that young children exposed to more than one writing system can distinguish between different scripts at an early age, by Schwarzer’s (2001) account of a first-grade student’s acquisition of three linguistic codes with varying writing systems at home and in a bilingual program at school, and by work by Li (2006) that examines how Chinese-Canadian young children exposed to three

languages can also develop extensive trilinguality. One interesting finding is that children have the ability to become biliterate and multiliterate even without formal literacy instruction, an ability that Reyes (2012) refers to as spontaneous biliteracy. In two cases of young Latino bilingual learners, she describes a teacher who uses a variety of teaching techniques to help students develop biliteracy in early childhood without formal bilingual instruction. For example, the teacher has students listen to a lesson in one language and then attempt to write about it in their additional language. Research on young learners provides interesting information about biliteracy because early childhood students are often unconstrained with prior ideas about code-switching or translation, and thus they use multiple languages in flexible, creative, and innovative ways.

Two-Way Immersion Programs

One area of special interest in recent years is the development of biliteracy in students enrolled in two-way immersion programs (also known as two-way dual language bilingual programs). As these programs have expanded in number in the USA, there has been a focus on how these programs assist students in attaining biliteracy and in the policy issues that are related to their implementation. Freeman (1998, 2004) has published two studies that examine two-way dual language bilingual programs. The first analyzes the established English/Spanish dual language program at Oyster School in Washington D.C., and the second text examines the implementation of a number of dual language programs in Philadelphia. This helps to give a rich description of the literacy events used to develop biliteracy among the students and also the challenges that the schools faced when attempting to elevate the status of Spanish and promoting a language policy that embraces bilingualism. Pérez (2004) presents a description of a two-way immersion program in San Antonio that she studied for 6 years using ethnographic methods. This research presents a detailed view of the ways in which the teachers and the learning environment aided students in becoming bilingual and especially the ways in which code-switching and linguistic transfer were used productively. This account is also notable for its discussions of how the pressure from the Texas state exams, the TAAS, affected the implementation of the dual language bilingual program.

While much of the research on dual language bilingual programs describes the positive effects on the children enrolled in successful programs, it is also important to consider the implementation challenges that some programs have encountered. Wiese (2004) has written of her experiences working with the implementation of a two-way dual language program in a second-grade classroom in a diverse school environment. Her study focuses on the tensions and conflicts that occurred when trying to assist students in becoming biliterate. These included the difficulties in meeting the needs of English speaking low-income students who came to school with little background in reading and writing, the time constraints in implementing balanced literacy instruction in two languages, and the ongoing process of deciding what type of language distribution would be best for the students at the school. This

type of study adds to our understanding of biliteracy by focusing on the complexity of meeting the language and literacy needs of diverse students.

Using Literature in Bilingual Classes

There are also a number of studies that have made major contributions to the understanding of biliterate development within bilingual programs by providing detailed analysis of how children's literature and the biliteracy workshop model can be incorporated into literacy instruction in two languages. One aspect of developing biliteracy is learning how to respond to literature. Ballenger (1999) is a heartfelt account of how culture influences students' responses to storybook read-alouds and creative play around stories in a preschool class with Haitian speaking students. Cox and Boyd-Batstone (1997) provide a detailed account of how literature and various types of reading responses are used in an upper elementary bilingual class. Their work is also notable for providing longitudinal case studies of three children's biliterate development between first and fifth grade, and an analysis of how their different home environments and experiences acquiring English and Spanish have influenced their literature response styles. Martínez-Roldán and López-Robertson (2000) also discuss how they used literature circles in a bilingual first-grade classroom. Their work explains the process of how they initiated Spanish and English literature circles in López-Robertson's classroom and the types of responses that were made by the children such as storytelling and intertextual responses. Ada and Campoy (2003) focus on how the use of children's literature, creative written responses, and the writer's authentic life experiences can create a bridge between the written responses required in school and the homes, communities, and cultures of students. In addition to a theoretical summary of creative writing by bilingual individuals, the text also provides ten thematic units that each focus on a different genre of writing. One of the key features of this text is the engaging examples of creative writing by teachers, parents, and students that are included in the text. Many of these are pictures of homemade books with illustrations that give the reader a positive view of the high quality of writing that can be produced by young biliterate authors. Overall, these four texts provide the reader with a variety of suggestions on how to encourage culturally and linguistically appropriate verbal and written responses to bilingual literature.

One common method of literacy instruction that is increasing in popularity is the balanced literacy workshop method which uses literature-rich activities to provide students with authentic practice using language for communication. In her expansive text on bilingual education, García (2009) describes in a chapter on biliteracy how the workshop model can be extended into a biliteracy workshop with the inclusion of multimodal texts, translanguaging practices, and multilingual literature. Building on the basic organization of the reading and writing literacy workshop, the chapter describes strategies that can be used in a biliteracy workshop including mini-lessons and vocabulary instruction in

multiple languages, reading activities to develop biliteracy practices, and the structure of a biliteracy writing workshop. This text is an excellent guide for teachers who want to implement this mode of instruction in a bilingual classroom.

Work in Progress

A large part of the work in progress in the field of biliteracy is an exploration of the concept of translanguaging. Translanguaging was a term first used by researchers in multilingual European contexts and is an expansive term that includes many aspects of multilingual and multidialectal language use including biliteracy, code-switching, translation, and the overall processes in which bilingual and multilingual individuals can use multiple languages and discursive practices flexibly in an integrated system. Researchers of translanguaging see the bilingual fluid language use not as evidence of a linguistic deficit, but rather as a resource that individuals who are bilingual or multilingual can use purposely and that demonstrates their multilingual competence and multicultural identity (García and Li Wei 2014).

One focus of research in translanguaging is looking at its role in achieving biliteracy and multiliteracy. Research in this area often focuses on the strategic moment-to-moment use of multiple languages and literacies in classrooms and out-of-school settings. For example, García and Sylvan (2011) examine the microalternation of languages in international high schools in New York City. Faced with students from many languages backgrounds with varied levels of proficiency in English, teachers in this context use a project-based curriculum and adjust the classroom language practices and the content to each student. For example, teachers in the international high schools make use of activity guides that give step-by-step guidelines for projects. While the activity guides are in English, some guides feature pictures and graphics with limited English text so that emergent bilingual students can still understand the content. Also, students who speak the same home language are often seated next to one another so that they can use their own language resources to figure out the class material together. In a different context, Creese and Blackledge (2010) examine the use of translanguaging in bilingual Gujarati and Chinese heritage (complementary) schools in the United Kingdom. They examine how English and Gujarati or Chinese are used alternately in school to make sure that as many of the students as possible can learn about upcoming school events, in label quests or translations to practice new vocabulary, and in group work where usage of both languages together is acceptable as long as the final product of the project is in the appropriate language.

Some research in the area of translanguaging also examines the various strategies that multilingual students can use to fully employ their biliteracy in the context of higher education in appropriate ways. Canagarajah (2011) introduced the concept of code-meshing, his term for the realization of translanguaging in written texts. His research analyzes the written work and writing process of a Saudi student who writes a linguistic autobiography in which she uses both Arabic and English in an

intergrated way. In another setting, Hornberger and Link (2012) describe a case of how university students training to be teachers at the University of Limpopo in South Africa are encouraged to freely translanguage in the Sepedi language, local language varieties, and South African English in order to better understand their class readings in English about child development and to carry out local research projects. These examples of translanguaging demonstrate that it can be a pragmatic approach to communication in multilingual classroom settings and show that translanguaging can break down communication barriers in interactions while developing additional language competencies.

Problems and Difficulties

While recent research provides strong support for the development of bilingual programs that would aid students in acquiring biliteracy, there is still a major difficulty in actually implementing bilingual education effectively. While some of these difficulties are related to questions of pedagogy or a lack of resources, many of the problems in implementing bilingual education are related to unequal power relationships in schools, communities, and related institutions.

One major difficulty is that many teachers are not fully biliterate themselves in the languages of their students. Thus, one area in which more research is needed is how teachers who are monolingual can promote biliteracy successfully. Skilton-Sylvester (2003) gives descriptions of the beliefs and teaching practices of four teachers of Khmer students who vary in their encouragement of the use of the students' first language in the classroom and their willingness to include the incorporation of elements of Khmer culture in their instruction. This research shows that the beliefs that the teachers hold about language acquisition and cultural identity strongly influence their teaching practices. Studies such as this one that examine the possibilities for preventing language shift and encouraging biliteracy need to be done in a large number of linguistic environments, especially where there are large numbers of students who speak lesser-known languages that may not be easily incorporated in existing school bilingual programs.

Another difficulty is how to ensure that biliteracy instruction is culturally appropriate when many teachers do not share a cultural background with their students. One suggestion to solve this problem is to use bilingual teaching assistants to help teachers adapt bilingual classroom instruction so that it is more congruent with the cultural funds of knowledge that are familiar to the students and the members of their community. An example of this is an ethnographic project that was conducted in classes in North West England on how classroom bilingual teaching assistants drew on their knowledge of the students' home languages and cultures to conduct a variety of culturally appropriate literacy events (Martin-Jones and Saxena 2003). In addition to describing the importance of the use of code-switching, nonverbal and multisemiotic cues, this work also shows how a variety of culturally appropriate activities such as cooking chapattis and telling stories about the Sikh New Year can be used to teach students academic content knowledge and biliteracy skills.

While much of the research regarding biliteracy focuses on younger learners, a third difficulty is how to develop biliteracy and ensure school success for high school students who are in danger of not completing high school. While younger learners have a more limited range of literacy abilities and a longer time span for acquiring biliteracy before entering college or the work force, there are distinct populations of emergent bilinguals at the middle and high school level who are often characterized by teachers and school administrators as “deficient” in language and literacy abilities. This has a major effect on the entire school experience for older emergent bilinguals. Menken (2013) describes the state of research on biliteracy instruction for emergent bilingual students in secondary schools. This population includes students with interrupted formal education (SIFE) and long-term English language learners (LTELs). These students are faced with the need to pass many high-stakes tests and to meet high literacy expectations, often with few instructional supports and limited instructional scaffolding. While there is a substantial literature on how middle school and high school emergent bilinguals can be assisted in achieving high rates of biliteracy, one problem that needs to be addressed is how to scale up the implementation of best practices in education for bilingual students, especially in areas with lower incidences of emergent bilinguals, rural areas, and in under-resourced urban schools.

Future Directions

While the research literature on the development of biliteracy in bilingual programs continues to expand, there are still a number of areas for further research that are still remaining to be explored in greater depth. More research is particularly needed in three areas: (a) the acquisition of biliteracy in lesser-known languages, (b) the influence of language planning efforts and government policies on biliteracy and bilingual education, and (c) the biliteracy development of students enrolled in bilingual special-education classes.

Languages vary in their grammatical organization, their writing systems, and their associated literacy practices. Thus, an important further direction for the field of biliteracy is an expansion of biliteracy research into more languages, especially non-Indo-European languages. In addition, we know quite a bit about the acquisition of biliteracy in North America, Western Europe, and Australia, but less is published about biliteracy acquisition in other areas of the world. The early focus of the field of biliteracy studies on the acquisition of literacy in indigenous languages needs to be revitalized, and more researchers need to be trained who are speakers of indigenous languages in order to carry out this research.

Furthermore, in the context of schooling in the United States, the policies enacted by the federal government are having a growing influence on the education of bilingual learners. Federal mandates have changed the context of schooling in bilingual programs by mandating the use of certain literacy programs and curricula as a part of comprehensive school reform and requiring students to take yearly English language exams. Some states in the USA such as California, Arizona, and

Massachusetts where voters approved propositions to limit access to bilingual education also have enacted policies that have changed the context of bilingual schooling. In addition, some states have high school exit exams that also have an influence on the context in which students are acquiring biliteracy. New Common Core standards have been approved in many states, and these standards may be having a negative effect on the ability of teachers to help students acquire biliteracy. Conversely, some states such as New York have examined research findings on the efficacy of bilingual education and are amending state requirements in order to encourage and require school districts to offer more bilingual programs. Clearly, more research needs to be done to document the effects that these federal and state restrictions are having on biliteracy development in bilingual programs. Literacy and language policy are intertwined, and it is essential that more research is done to determine the effects of new language policies on teachers' and schools' attempts to aid their students in developing biliteracy.

Many bilingual students also receive special-education services. However, little research has been done on the unique biliteracy developmental trajectory of bilingual special-education students. With a worldwide expansion of early childhood education, more research needs to be done on biliteracy development of bilingual childhood special-education students in the years before kindergarten entrance. Overall, there is little research that addresses this topic directly through ethnographic research, especially in a way that would examine how to best use the strengths of students in bilingual special education and their families. One notable study is Rodriguez (2005) that examines the home biliteracy activities of four bilingual Dominican families in New York City who have a special-needs child and suggests that the diverse language and socialization practices of these households could be used in effective ways in the bilingual special-education classrooms. More research of this type needs to be completed in additional populations and language groups.

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- V. Vaish: [Biliteracy and Globalization](#). In Volume: Literacies and Language Education
- H. Lotherington: [Elementary Language Education in Digital Multimodal and Multiliteracy Contexts](#). In Volume: Language and Technology

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Multicompetence Approaches to Language Proficiency Development in Multilingual Education

Ulrike Jessner

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Abstract

Due to a significant increase in interest in the phenomenon of multilingualism, research on multilingualism and multilingual education has grown over the last two decades. Some influential developments in research on second language acquisition and bilingualism have begun to exert an impact on second language teaching and bi- and multilingual education. These concerns include the symbiosis of the hitherto isolated fields of second language learning and bilingualism; the introduction of the concept of multicompetence, reflecting a *bilingual* view of

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bilingualism; and the application of dynamic systems theory to second language acquisition and multilingualism.

These new developments will be described in more detail, and the most important areas of research which have provided contributions to the development of multicompetence approaches to language proficiency will be examined. A central theme of the paper is that multilingual education can only be successful if the cognitive potential of multilingualism is explicitly acknowledged on the societal level.

Keywords

Multicompetence • Multilingual proficiency • Metalinguistic awareness • Dynamic systems theory • Third language teaching

Introduction

Due to a significant increase in interest in the phenomenon of multilingualism, research on multilingualism and multilingual education has grown over the last two decades. Some influential developments in research on second language acquisition and bilingualism have begun to exert an impact on second language teaching and bi- and multilingual education. These concerns include the symbiosis of the hitherto isolated fields of second language learning and bilingualism; the introduction of the concept of multicompetence, reflecting a *bilingual* view of bilingualism; and the application of dynamic systems theory to second language acquisition and multilingualism.

These new developments will be described in more detail, and the most important areas of research which have provided contributions to the development of multicompetence approaches to language proficiency will be examined. A central theme of the paper is that multilingual education can only be successful if the cognitive potential of multilingualism is explicitly acknowledged on the societal level.

Early Developments

The concept of language competence was introduced into linguistics by Chomsky (1965), who was one of the first linguists to develop an explicit theory of *competence*. Chomsky (1965, p. 3) stated that “[l]inguistic theory is concerned primarily with an ideal speaker-listener, in a completely homogeneous speech-community, who knows its language perfectly and is unaffected by such grammatically irrelevant conditions as memory limitations, distractions, shifts of attention and interest, and errors (random or characteristic) in applying his knowledge of the language in actual performance.” Although it was never explicitly stated by Chomsky, it can be assumed “[...] that the native speaker and her/his innate faculties are necessarily monolingual,” as pointed out by Herdina and Jessner (2002, p. 31).

Hymes (1972) as one of Chomsky's critics introduced the notion of *communicative competence*, thereby adding a stronger sociolinguistic dimension to the psycholinguistic notion of competence in which verbal repertoire, linguistic routines, and domains of language behavior play crucial roles. This contrasts with the Chomskyan point of view, which posits linguistic competence in isolation from general cognitive conditions or sociolinguistic aspects. Chomsky's approach is complemented by the principle of modularity of mind, which assumes both that the various faculties of the mind are to be thought of separately and that the components of language competence, that is, the lexical system, syntactic system, phonetic system, and so on, can also be interpreted as separate modules. In an attempt to define "competence," Chomsky (1980, p. 59) draws a distinction between knowing the forms of a language, the ability to use the language one knows, and actually using it.

Until very recently, the concept of language competence was seen as applicable to both first and second language contexts. Only when scholars such as Harley and colleagues (1990) started to develop common frameworks for both research fields – a turn which we might want to call a multilingual turn in research – did scholars start observing the competence of individuals who know more than one language.

Major Contributions

Current work on multilingualism and multicompetence, in particular, has mainly been influenced by holistic ideas of bi- and multilingualism. Grosjean's work (1985) on the bilingual as a competent but specific bilingual speaker-hearer strongly influenced both Cook's concept of *multicompetence* (e.g., 1991) and Herdina and Jessner's (2002) *dynamic view of multilingual development and multilingual proficiency*, as discussed in the following sections.

Bilingual View of Bilingualism

Grosjean (1985) was the first to introduce a bilingual or holistic view of bilingualism. His approach opposes the monolingual norm assumption that interprets bilingualism as a kind of double monolingualism. This viewpoint has dominated most research on bilingualism and has given rise to portraying bilinguals as deficient monolinguals in each of their languages. Such an attitude has also been accepted by a large number of bilinguals who, although they function in both languages on a daily basis, criticize their own language competences and therefore are hesitant about referring to themselves as bilingual. The strong belief that a person can only be called truly bilingual if she/he is ambilingual, that is, is fully competent and therefore comparable to a monolingual native speaker in both languages, still prevails. Such an approach to bilingualism reflects the focus of researchers on the so-called negative effects of contact between two languages, be they of linguistic or social nature. And this belief is also reflected in language tests used to assess the language skills of bilingual children since they do not consider features of bilingual speech. Grosjean (1985)

compared the bilingual speaker to a high hurdler who combines his or her competences, jumping and sprinting, in one person, although she/he is neither a sprinter nor a high hurdler. In this sense the bilingual speaker is a human communicator who has developed communicative competence in two languages in order to be able to cope with the communicative needs of everyday life.

In his more recent work, Grosjean (e.g., 2001) concentrated on language mode as a crucial control variable to be taken into account in research on bi- and multilingualism. Language mode, which has to be seen on a continuum from monolingual to multilingual mode, describes the state of activation of the multilingual person's linguistic repertoire, that is, when and why a speaker uses or activates one, two, or three of her/his languages.

The Concept of Multicompetence

Over the past 15 years, Cook (e.g., 1991, 2003a) has developed the notion of multicompetence understood as the knowledge of more than one language in the same mind or, in other words, including both the knowledge of the first language (L1) in addition to the interlanguage and the knowledge of the second language (L2). Cook's concept has been discussed and used in several areas of (applied) linguistics, mainly in second language research and teaching (<http://homepage.ntlworld.com/vivian.c/SLA/Multicompetence/index.htm>). By drawing on Grosjean's ideas of the bilingual as a person in her/his own right, separated someone who knows more than one language from the native monolingual speaker by emphasizing that the monolingual mind differs from the mind of the second language learner. Additionally, the term *L2 user* became preferred over the L2 (or bilingual) learner by Cook to imply that the user is different from a learner who is always learning and never achieving.

Cook states that the second language user has a different perspective compared to the monolingual on the L1 and the L2 and also develops a different kind of metalinguistic awareness and engages in different forms of language processing. The research that has derived from this concept has been concerned in particular with the effect of the L2 on the L1 (Cook 2003b) and with the relationships between the language systems in the L2 user's mind, as discussed in Cook (2006). As pointed out by Cook (e.g., 2006) himself, in order to capture the multilingual learner's mind, we need a novel approach such as that taken by Herdina and Jessner (2002) who introduced dynamic systems theory as a metaphor for discussing multilingual development.

Dynamic View of Multilingualism

As one of the first to apply dynamic systems theory to applied linguistics, Herdina and Jessner (2002) developed a dynamic model of multilingualism (henceforth DMM). They emphasize that dynamic systems theory provides a useful metaphor for discussing multilingual development. A multilingual system is an adaptive

complex system which possesses the property of *elasticity*, the ability to adapt to temporary changes in the systems environment, and *plasticity*, the ability to develop new systems properties in response to altered conditions. In DMM, perceived communicative needs, which are psychologically and sociologically determined, are identified as the driving force of language learning and use. Such a holistic view is a necessary presupposition of a dynamic view of multilingualism assuming that the presence of one or more language systems influences the development not only of the second language but also the development of the overall multilingual system. Research on third language acquisition has been able to show the complexity of a multilingual system by focusing in particular on the differences between second and third language acquisition (e.g., Cenoz et al. 2003) and the teaching of third languages (Jessner 2008b).

In DMM, multilingual proficiency is defined as a cumulative measure of psycholinguistic systems in contact. These systems are not identical to language systems as a result of their crosslinguistic interaction, which also integrates synergetic and interferential effects, and the influence that the development of a multilingual system exerts on the learner and the learning process such as greater expertise in learning skills and qualities distinguishing the experienced from the inexperienced learner. As emphasized by Herdina and Jessner (2002), Cummins' interdependence hypothesis (1991), which is based on the assumption of a common underlying proficiency due to the contact between two languages, presents a related concept in a similar way to Kecskes and Papp's (2000) notion of a common underlying conceptual base; they both describe an overlap between L1 and L2 and not a complete metamorphosis of the systems involved as is the case with DMM.

A heightened level of metalinguistic awareness is defined as part of the multilingualism factor which also relates to cognitive aspects of multilingual learning such as an enhanced multilingual monitor and/or the catalytic effects of third language learning (see Cenoz et al. 2003) on the effects of bilingualism on third language learning). Metalinguistic knowledge and awareness of that knowledge play a key role in multilingual learning and use, as discussed in detail in Jessner (2008a). Changes of quality between second and third language learning are based on the differences in norms that the language learners relate to, that is, a bilingual norm in third language learning as opposed to a monolingual norm in second language learning. In addition, in most contexts, third language learning assumes that the learner has already gained experience in learning a second language (Hufeisen 1997).

Work in Progress

Although the notion of multicompetence has not yet exerted a major impact on discussions of the multilingual mind in learning and teaching contexts, a tendency to incorporate the main conceptual ideas of multicompetence into new ways of thinking in research studies of bi- and multilingualism can be detected (e.g., Hall et al. 2006). Recent publications such as May's edited book on the multilingual turn in SLA,

TESOL, and bilingual education (2014) take up the idea of criticizing the monolingual bias which has been prevalent in applied linguistics for a considerable time. Many of these new tendencies are associated with efforts in multilingual education contexts to raise metalinguistic awareness or to promote broader cognitive benefits from a heightened level of metalinguistic awareness in experienced learners (e.g., Conteh and Meier 2014; Hofer 2015).

The number of third language studies, mainly focusing on the differences between second and third language learning, has increased over the last 10 years (e.g., Cenoz et al. 2001, 2003). Many of these studies, which have been concerned with lexical transfer phenomena in third language learning, have evidenced the activation of other languages than the target language in crosslinguistic consultation (for an overview see Jessner 2006, p. 74ff.; see also Green 1996). In other words, these connections between the languages in a multilingual's repertoire can be a counterargument against the traditional attitudes of both teachers and educationalists to keep the languages in the classroom apart in order to avoid confusion. Recently, a number of cross-language approaches to language education have been suggested to foster synergy effects and cross-fertilization through cooperation between the languages and the language subjects in a classroom, as discussed below.

Such an approach also reintroduces L1 to the classroom. Until recently, due to the influence of traditional contrastive analysis, the intrusion of L1 in the classroom was viewed as interference or negative transfer for second and further language learning. But since transfer has been attested a facilitative role in second language learning (e.g., Lewis 1997; Schweers 1993), the L1 or prior linguistic knowledge has been used as a cognitive basis for further language learning. From a holistic perspective, this fairly new development is also related to the L1 maintenance programs in migration contexts (e.g., Krumm 2005; see also below).

As part of a cross-linguistic approach to language awareness, James (1996, p. 145ff) suggested reintroducing contrastive analysis for consciousness-raising purposes, namely, to put a special focus on the cognitive dimension of contrastive analysis by gearing it toward the learner. Such an approach also implies that metalinguistic aspects of in-class contrastive analysis are focused on, as happens in the case of translation. Similarly, Hawkins (1999) referred to language learning as language apprenticeship by emphasizing that the main aspects of language learning concern the process of how to learn to learn a language and to engage in cross-language comparisons with particular reference to the role of L1 in second language learning. Cummins (2001) suggested a transformative pedagogy using collaborative critical inquiry to develop critical language awareness. Students should be made aware of language forms and uses, part of which can be done through, for example, cross-lingual comparison of European languages deriving from Latin and Greek, including cognates and proverbs. This activity can be complemented by the comparison of similarity across languages in the way abstract nouns are formed from verbs. Wandruszka's pioneering work on how to exploit the common linguistic core, that is, the Latin and Greek origins, of the main European languages English, French, Spanish, and German as a basis for language learning is useful in this regard (Wandruszka 1986).

The development of metalinguistic abilities, i.e., the development of skills distinguishing between form and meaning in order to be able to manipulate languages, constitute part of a language learning strategy training which ideally should be combined with a cross-language approach. The experienced learner who has become aware of the structural similarities and differences between the languages of his/her repertoire has also learnt how to expand the repertoire as well as how to use the strategies, as already discussed by McLaughlin (1990). The number of language learning strategies are related to prior linguistic knowledge and the levels of proficiency in the respective languages of the speaker (Mißler 1999; Ó'Laoire 2001). More recently, Wrembel (2005) has developed a metacompetence-oriented model of phonological acquisition for second language learning and teaching.

Based on the aim of the European Union to have citizens who are able to use their mother tongue plus two other languages, a number of European projects have developed new approaches to language proficiency in multilingual education. For example, the EuroCom (European Comprehension) project (www.eurocom-frankfurt.de) has concentrated on how to provide European citizens with a solid linguistic basis for understanding each other, at least within their own language family. Such an approach includes optimal inferencing techniques in typologically related languages in order to develop at least receptive skills in the new language and has so far been applied to Romance, German, and Slavic language families (Klein and Rutke 2004). In other projects, funded by the European Centre for Modern Languages, the creation of synergy in language learning beyond language borders has been crucial (e.g., Hufeisen and Neuner 2003, on learning German as L3). Candelier (2003) coordinated a European project to foster language awareness in schoolchildren. The ultimate goal of all these efforts was to arrive at a common curriculum for teaching languages in institutional contexts, as discussed in Hufeisen and Lutjeharms (2005). An integrated approach to language teaching requires the cooperation of all language teachers, as well as teacher education (Allgaeuer-Hackl and Jessner 2014).

Problems and Difficulties

As discussed above, Cook's concept of multicompetence suggests a holistic view of the L2 user. This fairly new perspective implies the introduction of multilingual norms instead of monolingual or traditional norms in linguistics. There are still, however, a number of problems to be solved, including the status of the native speaker in language research and teaching, the range and order of languages to be taught in a curriculum, and teaching material. These three topics are discussed below.

Status of the Native Speaker

Recently, the concept of "native speaker" has come under strong attack in discussions of norms in multilingual research and teaching. Cook (1999) suggested that

multicompetence should replace the native speaker norm as the goal of language teaching (compare Herdina and Jessner 2002 on multilingual proficiency).

The native versus non-native teacher discussion is especially important for teachers of English. Recent studies have focused on the dilemmas of non-native teachers of ESL and whether nativeness matters to students who are taught English by non-native speakers (for an overview see Lurda 2005). Ellis (2005) points out that the non-native teacher is able to pinpoint linguistic problems and offer metacognitive learning strategies that the native teacher without foreign language experience is unable to detect.

Crosslinguistic Interaction, Connectivity Between Languages, Translanguaging

Language contact and its social implications have always been much debated in linguistic circles. Due to the introduction of the term “translanguaging” the rather traditional debate on crosslinguistic influence and the connectivity between language systems has now reached academics interested in multilingual education. In a recent book, García and Li Wei (2014) propose translanguaging as the fluid language practices of bilinguals and how such a pedagogical approach can change traditional understandings of education.

At the same time, the discussion whether we should view languages as separate or interdependent is still ongoing. Aronin and Singleton (2012, p. 149) critically remark that the topic of language differentiation where “the focus is on opting between *language* resources, on the *co-ordination* of such resources and on multilinguals’ constant decision-making as to what strategic moves they should make to achieve specific communicative effects in social interaction” appears to be neglected in the discussion on translanguaging (see also language management skills in *A Dynamic Model of Multilingualism* by Herdina and Jessner 2002).

Range and Order of Languages to Be Taught in a Curriculum

As already indicated above, research on third language acquisition has shown that learning a second language differs from learning a third one. This has implications with regard to the level of proficiency to be reached in each of the languages in the curriculum, the starting age for each of the languages, and the nature of crosslinguistic contact between the languages of the curriculum (Jessner and Cenoz 2007).

The typology of the languages offered in a curriculum also plays an important role in the order of acquisition, as was shown by Grießler (2001) in her comparative study of level of proficiency in English in three Austrian secondary schools. Grießler found that pupils who were introduced to French parallel to English at an early stage outperformed pupils from regular school types where French was taught some years later than English. Similarly, a Swiss study at the primary level showed that the two languages can influence each other very positively (Haenni Hoti et al. 2011).

Finally, the choice of languages in curriculum planning is a difficult task since a successful language curriculum should be able to integrate minority and/or heritage languages as well as a number of foreign languages which are of interest to the social community (Krumm 2005). Besides, problems concerning the choice of languages for heritage language programs might occur. For example, an Austrian study by Brizic (2006) detected a mismatch between the linguistic background that the parents of Turkish migrant children were assumed to have and their actual language background.

Additionally, in reaction to the rapid increase of English as a lingua franca, the role that English should play in a multilingual classroom has received considerable attention in scientific debate. One of the most frequently asked questions is whether English should be given a prominent role in education as the first foreign language in those countries where English is not used or whether it would make more sense to teach mainly languages other than English in instruction since English would be learned anyway due to daily contact with the language outside the classroom (e.g., Vollmer 2001). Only recently has it been suggested to focus on multilingualism with English in order to capitalize on the positive cognitive effects of multilingual learning which will necessarily show a washback effect on English language learning (Jessner 2006).

Teaching Material

Comparative grammars and other reference material are necessary requirements for successful instruction. But unfortunately multilingual teaching material is still rather scarce. Hufeisen and Jessner (2009) see Glinz's (1994) learner grammar for German-French-English-Latin was followed by Müller (1999) on German-English-French. Apart from a few attempts to develop material used to raise language awareness in children (Candelier 2003; Feichtinger et al. 2000), textbooks still need to be developed for multilingual education. Ideally, multicompetence approaches to teacher material development have to consider developing common grammatical terminology as one of the prerequisites for multilingual learning.

As pointed out by Oomen-Welke (2006) a great deal of multilingual learning happens through comparisons and promotion of metalinguistic awareness. Awareness of language learning strategies can build on the constructive potential of comparing languages. Open material is needed to incorporate new languages, even if they are only known by the pupils who can act as experts, which strengthens the role of the learners, particularly in migration contexts. Ideally, the development of multiliteracies presents an integral part of multilingual education (Cummins 2006).

Future Directions

As is clear from the previous discussion, much work on how to develop multicompetence approaches to language proficiency development in bi- and multilingual programs needs to be done. One of the main domains which needs further

development is multilingual testing. If we want to understand the multilingual person as an individual in his/her own right, we need to put an emphasis on empirical investigation of constructs of multilingualism in language testing. To understand a multilingual person as somebody who has a different way of using and knowing her or his languages in contrast to the native speakers of the respective languages means that we acknowledge the cognitive chances that a life with multilingualism can offer and profit from the benefits of the contact with two or more languages. Such a perspective requires that we give a less prominent role to the linguistic “deficits” of second language learners and users in exchange for the cognitive benefits that the life with more than one language can offer, so that we will be able to understand that multilingualism is not just additive monolingualism in several languages. Consequently, a reorientation toward the dynamics of multilingualism should replace a conventional monolingual norm. Only by applying multilingual norms will applied linguistics be able to understand the requirements of successful multilingual education. Multilingual assessment will have to take holistic constructions of bi- and multilingualism into account, thereby facing tensions between linguistic homogenization imposed by nation-states and real-life multilingualism (García et al. 2006; see also Jessner and Kramersch 2015).

In recent years, many attempts have been made to reconcile Universal Grammar with other research concepts of language acquisition (e.g., Plaza-Hurst 2008). Chomsky’s ideas of a speaker-oriented, rather than a systems-oriented, theory certainly helped to provide a theoretical framework needed for language acquisition research in general. Nevertheless his research focus on the ideal, implying monolingual, speaker-hearer has turned out to be a hindrance rather than a support in a world where monolingualism is the exception rather than the rule. If we want to guarantee multilingualism for all, and not elite multilingualism for some (Mejía 2002), the application of multicompetence perspectives on language proficiency development offers a promising way of how to approach the multifaceted challenges of multilingual education.

Cross-References

- ▶ [Teaching for Transfer in Multilingual School Contexts](#)

Related Articles in the Encyclopedia of Language and Education

- M. E. Malone: [Developing Instructor Proficiency in \(Oral\) Language Assessment](#). In Volume: Second and Foreign Language Education
- J. Cenoz and D. Gorter: [Translanguaging as a Pedagogical Tool in Multilingual Education](#). In Volume: Language Awareness and Multilingualism
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Identity, Transnationalism, and Bilingual Education

Tae-Hee Choi

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Abstract

First appearing in studies in language learner motivation and attitude, bilingual education (BE) and identity of its participants emerged as a field of study in the mid-twentieth century. Although understandings of BE and identity have been varied, it is agreed that participant identities have a reciprocal relationship with BE programs which reflects social discourses and ideologies. Starting with

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explanation of key concepts, this chapter first presents select early literature in BE vis-à-vis identity in the latter half of the twentieth century with foci on identities of students and teachers. Related research centering on students mainly revolves around how learning of minority students is affected by language hierarchies reproduced in BE classrooms and ways to exalt minority assets in classroom interactions. On the other hand, discussions focusing on teacher identity explore how BE teachers negotiate professional identities under dominant social discourses such as long-lasting identity inscriptions (e.g., race and gender), native-speakerism, and educational reforms.

The chapter then pays special attention to a group of individuals known as transnationals, who have gained a stronger presence in the era of globalization with unique identity formation patterns which shed light on the importance of valuing minority cultural assets in multicultural settings. As few, if any, BE programs have considered scholastic insights about improving equality in BE program development and policymaking, the following section will explore select related problems and difficulties. Finally, it presents newly arising directions in BE research including social class, technology in learning, and identities in changing context as conclusion.

Keywords

Bilingual education • Education reform and teacher identity • English teacher identity • Identity • Student identity in language classrooms non-native • Transnationalism • Transnationals

Introduction

School programs claiming to offer bilingual education (hereafter referred to as BE) are pervasive in diverse educational settings and different parts of the world. For example, BE has manifested itself in mainstream education (e.g., English-medium and Putonghua-medium education under the biliterate and trilingual policy of Hong Kong), in content-language integrated language (CLIL) programs in European secondary schools, in transitional education programs for students with limited proficiency in the dominant language of the context (e.g., LEP programs in the USA¹), and in modern language programs at secondary and tertiary educational institutes (e.g., Spanish classes in the UK). These programs, however conflicting their conceptualizations of “BE” are, all provide a site for co-constructing, negotiating, and transforming identities (Duff and Uchida 1997) at which students’ co-constructed selfhoods are fashioned by instructional styles governed by the identities of their teachers, including how different languages are represented and

¹For further information about policies related to LEP (Limited English Proficiency), see <http://www.hhs.gov/ocr/civilrights/resources/specialtopics/lep/>

treated in the classroom. This chapter delves into major issues revolving around identities of learners and teachers in BE, which reflect “the larger, global politics of identity and language learning and use” (Baquedano-López and Kattan 2007, p. 88). The development and discussion of BE vis-à-vis identity has, so do other areas in education, been strongly influenced and led by changes and discourses in the wider social and global contexts. Since the mid-twentieth century, one of the major issues associated with BE has been concerned with equality between social groups under different labels such as race, ethnicity, culture, and gender and figures in different levels of education, settings, regions, and times.

Key Concepts and Early Development

Bilingual Education (BE)

Although conceptualizations of BE have been versatile, the most commonly conceived image of BE, also the common ground different BE programs characteristically share, is, simply, the coexistence of two languages being used in education. Beyond this shared base, BE programs around the world have exhibited understandings of the notion of BE that are drastically different and often conflicting with each other or with definitions used among academics. Among the latter, one of the most common conceptions of BE is that two languages are used as media of instruction (MoI) (e.g., García 2009), as opposed to second language education programs, where the target language is characteristically the MoI and students’ home languages are almost completely disregarded. However, in practice, some of such monolingual programs are also “mistakenly” (Feignberg 2002, p. 1) called BE.

In this chapter, BE will be treated as an umbrella term which incorporates the majority of the conceptions of BE as embodied in the abovementioned programs as well as definitions used in academia. This is first to reflect the varied, sometimes misconstrued understandings of BE in practice and policymaking so as to fully account for the experiences of learners and teachers in “BE” programs worldwide. Second, in reality different BE programs may be similar in instructional practice to accommodate students’ expectations and linguistic competence (e.g., some bilingual education programs where two languages are used as the MoI focus on accuracy and grammar, whereas some second language programs sometimes adopt both the target language and students’ L1 as the media of instruction.). Thus BE in this paper is conceptualized as instructional practices where two languages² or language varieties are used concurrently or alternately as the media of instruction in one academic program.

²In many cases, bilingual education may refer to education that involves the use of more than two languages, and therefore, it is used interchangeably with multilingual education.

Identity

As the notion of identity has not traditionally been associated exclusively with language learning and teaching, it is necessary to define its scope in relation to BE as conceptualized in this chapter. Brubaker (2004) summarizes five main meanings attributed by the term “identity” in academia:

1. Self-understandings
2. “Sameness” among members of a group
3. Core and fundamental aspects of selfhood
4. “Groupness” which develops iteratively
5. A fluid, multiple, and co-constructed selfhood

In the studies that will be discussed in this chapter, the term “identity” is understood with or even beyond any of these meanings, and some of them reflect conflicting philosophical stances (see Lin 2008 for an overview of the contributions from different disciplines to the discussion of identity). However, the majority of the studies cited here use the term to denote the first and the fifth meanings, that is, personae as understood by selves and personae as negotiated, co-constructed, and performed through interactions with others.

Bilingual Education and Identity

Recognizing BE as a site inducing identity negotiation and formation, attempts to explore the relationships between identity and BE had been made prior to the 1950s, in studies of motivation and attitude which involved concepts such as self-concept and self-worth (McKinney and Norton 2008). Since the 1950s, formal research on the relationship between identity and BE has started to emerge, among which Morgan (2004), gesturing toward a social perspective on BE, makes an insightful observation drawing on Jim Cummins’ *Negotiating Identities: Education for Empowerment in a Diverse Society*:

Choices in methodologies (e.g. collaborative critical inquiry vs. teacher-centered transmission), or the structure of bilingual programs (e.g. two-way bilingual programs that promote *additive* bilingualism vs. compensatory/transitional programs)... highlight particular identity options for students, which in turn have lifelong *social* consequences. (p. 83; original emphasis)

Enacted pedagogy and language ideologies embodied in classroom interactions project a miniature of society to students as well as construe and influence identity options available to them. While students are relatively passive in influencing lesson delivery, teachers of BE programs, on the other hand, may choose to follow or resist certain teaching methodologies or even the preselected model of bilingualism imposed upon them based on their values and educational philosophies, which constitute a major part of their teacher identities.

Transnationalism

The phenomenon often termed globalization, compression of time and space due to advances in communication networks, transportation, labour management, and political frameworks, has brought forth a new group of people known as transnationals, who lead lives in multiple locations across geographical and national boundaries. Present-day examples of typical transnationals include migrants, refugees, missionaries, highly skilled workers with foreign-honed expertise, and, often neglected in the literature, international students. Their activities and the social processes involved were thus termed transnationalism in the early 1990s and Vertovec (2009) uses the term to refer to the collective attributes, interests, and sustained cross-border linkages and exchanges of transnationals. Transnational connections are built when people physically move across borders as well as when a nonmobile person's lifestyle is influenced by others overseas or in the local community but with a different cultural background (Vertovec 2009). Despite different modes and roles through and extents to which transnationals maintain binary interconnectedness, transnationalism typically involves the process of integrating into a new community while maintaining connections with their places of origin.

Major Contributions

Student Identity and BE

Echoing the increased awareness of inequality in society, one of the major strands of studies in relation to participants' identities in BE programs focuses on the identity development of linguistic minority students especially the ones with a socially subordinated ethnic background. Baker (1988) provides a substantial review of such studies. A major researcher he quotes is Katz (1960, as cited in Baker 1988), who observed that youths coming from a language minority group relinquished their native language in order to be accepted by the majority group in the society in which they lived. Katz's study, claims Baker, reports that ethnolinguistic minority students' self-concepts in relation to their home culture and language, which may be subject to host communities' evaluation, affected their willingness to learn their native customs and tongues (e.g., Welsh students in England).

Since the 1970s, the impact of students' identity development in classrooms on their educational success has gained considerable attention in academia. For instance, Jim Cummins has conducted a series of studies which reveal the impact of learning experiences of linguistic minorities in BE programs in Canada and other contexts on students' identity construction and concludes that "[t]he process of identity negotiation is fundamental to educational success for all students" (2000, p. 254). With a focus on the production of language hierarchy in classroom, Heller (1996) documents and analyzes how the statuses of two varieties of the same language were projected in the BE classroom and the reactions of linguistically

marginalized students based on the interactions occurred in a French classroom in Ontario, Canada. The study finds that the teacher intentionally or inadvertently legitimized the standard form of French through giving floor to its users and delegitimized the vernacular counterpart by ignoring contributions using the variety and censuring the use of it. When faced with marginalization of their language assets marking their identity, some of the students exhibited resistance by deliberately using the stigmatized variety more frequently than needed, and some developed negative self-concepts and, in turn, lost motivation to study.

Since the beginning of the twenty-first century, research in the field of BE vis-à-vis identity has identified several measures that would enhance the learning of ethnolinguistic minority language users. Recognizing the drawback of marginalizing ethnic minority students' home languages, scholars such as Field (2008) advocate an alternative view on language diversity which projects students' home languages as legitimate and as resources by, for instance, allowing students to use their mother tongues in the classroom. This view is embodied in dual-language programs, also known as two-way immersion or two-way bilingual programs (e.g., Spanish-English immersion programs in the USA). In these programs, ethnolinguistic minority students and their dominant counterparts exchange their own native languages, which research has found could lessen the degree of marginalization of the minority students (see Freeman 1998 for an overview of forms and practices of dual-language programs in the USA). However, Block (2014) points out that often these programs, while focusing on the distribution of students according to their ethnolinguistic backgrounds, fail to accommodate in pedagogy the factor of social class. The identity construction of ethnolinguistic minority students, the majority of whom are likely from working class families and thus "bring a very different set of dispositions and cultural capital to schools than do their middle class counterparts" (p. 130), may not be jeopardized because of their race or ethnicity but of the teacher's failure to recognize and cater to different learning needs resulted from differences in class positions.

In a system where marginalized identities are imposed upon migrant students, some of them may maneuver through the system without becoming victimized. Canagarajah (2013), in his pioneering work based on his analysis of firsthand and secondhand data of interactions in contexts such as South Asia or the UK, theorizes how interlocutors with different linguistic repertoires strive to secure and maintain equal status for each other in communication. In the work, he argues that educational practitioners should help themselves and language learners become translanguals, who consider all available linguistic (e.g., language borrowings) and semiotic resources (e.g., gestures, situational cues, and objects) as part and parcel of one's communication repertoire and thus become able to navigate smoothly through practices and discourses in which they may be subject to marginalization due to lack of full communicative competence in the socially dominant language. Other than utilizing linguistic and semiotic resources, translanguals also use strategies such as adopting an identity which may be more aligned with the other interlocutor(s) in a conversation to communicate on an equal footing despite differences including language proficiency and ethnicity. For instance, drawing on Planken's (2005, as

cited in Canagarajah 2013) study, Canagarajah notes how Norwegian and Swedish salespersons managed to establish common grounds despite their different cultural backgrounds by emphasizing their nonnativeness to English as a strategy to reduce communication breakdowns.

Teacher Identity and BE

Around the onset of the twenty-first century, research on identities of teachers has started to proliferate because their roles were found to be crucial in shaping pedagogy and thus learning experiences and outcomes in BE (Varghese et al. 2005). The body of literature regarding teacher identity in BE altogether provides a general overview illustrating how different factors shape teacher identity in, almost exclusively, negative ways. The formation of teacher identity is in the first place affected by discourses which have a longer history in generating social debate. For instance, with an Indian teachers' recount of the way racism was embedded in teacher identity in the Indian society, Varghese et al. (2005) discuss how social categories such as gender, sexual orientation, and ethnicity affected teachers' pedagogical approaches and how their teaching was perceived by students. Echoing this review showing influences of the wider social sphere on teacher identity, Braine (1999) and Llurda (2005) together provide an insightful overview of research studies investigating how teachers' identities were affected by stakeholders' perceptions construed around native-speakerism. They draw particular attention to long-standing stigmatization of nonnative educators in language education such as prioritization of native speakers in recruitment and pay schemes as well as stakeholders' doubts as to nonnative teachers' competence and authority. In many language-teaching sites, ethnicity and country of birth were the two most popular criteria for evaluating a candidate's expertise rather than his or her qualifications and experience in language teaching, which imposed a marginalized identity on nonnative English language teachers.

Changes in educational policies may also induce transformation of teacher identity in BE. A set of research which investigates the power of discourses on teacher identity concerns educational reforms including revisions of language policies and pedagogical innovations, for instance, communicative language teaching (CLT) and English as a medium of instruction (EMI), which have been promoted in a large number of Asian countries on the ground of English proficiency being a key to enhance their competitiveness in the global arena (Choi 2016). With these changes in the teaching context, new discourses regarding teacher expertise and pedagogy emerged and compelled teachers to adjust their identities in alignment with the change. For example, under the communicative approach, language teachers need to serve the role of a facilitator rather than a knowledge transmitter to help create an authentic context inducing genuine communicative exchanges in the classroom. In a considerable number of non-European contexts, schools tend to implement a teacher-centered curriculum and teachers are traditionally perceived as knowledge transmitters; therefore to conduct a CLT

lesson, teachers are required to adopt a drastically different role which may not be accepted by the profession or the society. The promotion of EMI, on the other hand, may cause nonnative English teachers more easily to be positioned as incompetent, by society or themselves. For instance, Choi (2015) reports how the EMI policy enforced in a teacher certification in South Korea affected teachers' identities in different ways: those who could prove their "competence" through certification were then perceived as experts, whereas those who failed to be certified regarded themselves as incompetent teachers.

Negotiation of teacher identity also occurs at an institutional level, where teachers seek to gain acceptance as "approved" participants in a new work context. Drawing on research by Wenger (1998, as cited in Varghese et al. 2005), Varghese et al. (2005) find that in the community of practice of a BE program, teachers establish a sense of membership through professional engagement with and affirmation from colleagues. The BE teachers in the investigation showed varied levels of internalization with the normative discourses about BE teacher identity available in the BE program: some of the teachers exhibited a thorough BE teacher identity as advocated in the community of practice or lived in concordance with it, while the others failed to reconcile with the identity and left the profession. Based on her observation, Varghese et al. (2005) conceptualize/consider bilingual teaching as "different ways of being and engaging" rather than "a set of standards" (p. 29).

Work in Progress: Transnationalism as an Emerging Arena for Negotiation of Identities in BE

The identity development of transnationals is worth to mention in this chapter focalizing the relationship between BE and identity, as the construction of transnational's self-conceptions casts a more complicated picture than their mono-contextual counterparts. On one hand, identities of transnationals, who are typically bi-/multilinguals, are particularly tied to competence of the dominant language in the host context since the negotiation of assumed identities – identities chosen out of options and enacted by interlocutors – indexed by use of language, is subject to affirmation or challenge by other members in the community during interactions (Pavlenko and Blackledge 2004). On the other hand, the identities of transnationals are shaped in reference to assumptions of their cultural and social background they face in home and host societies, as they have access to discourses regarding their background and linguistic assets from both contexts (Vertovec 2009). Although transnationals may not necessarily be educated in a BE setting, their unique experience in negotiating identity in the host context while maintaining ties with their origin provides implications to inform BE practice.

In the case of immigrants as transnationals, their identity formation is likely to be vulnerable due to their relatively less advanced proficiency in the dominant language. As discussed before, second language learners in many BE programs are thrust with a rather stigmatized identity because of their "imperfect" competence in the socially dominant language, which, in the first place, jeopardizes their

opportunities of education, a primary channel of socialization. Besides proficiency in the dominant language, the reception of the home culture of transnationals also poses challenges to their identity development. Although some transnational youths maintain their ties with their home context and use them as their social assets, one of the typical responses that have been documented is distancing themselves from the home country in order to be accepted into the host society, as the following remark made by a Chinese American college student cited in Jenkins (2009) shows:

When some of my classmates began to ridicule and throw racist remarks at Chinese people, I began to distance myself away from Chinese culture. I felt ashamed when my parents spoke to me in Cantonese at a supermarket. . . I continuously tried to fit in, even if it meant abandoning culture and identity. (p. 106)

Contrary to common beliefs, Cohen (2008) found that transnationals who had maintained their ties with their countries of origin had higher academic achievement than those who had abandoned their ties irrespective of difference in educational settings. Thus transnationals with linkage to their home cultures may be less susceptible to participation in, to borrow Kumaravadivelu's (2003) term, "self-marginalisation." This situation may be in part corroborated by the identity development of another group of transnationals in a completely different stance – the students of the new global elite (SONGES).

In direct contrast to immigrants, who are mostly portrayed as the marginalized, SONGEs are in a relatively superior position. In discussing the place of social class in the study of bi-/multilingualism, Block (2014) pays particular attention to what he calls "global bi/multilingual elite" (p. 134), who are proficient in two or more languages with decent socioeconomical background and perceive the study of English as "linked to notions of cosmopolitan citizenship" (p. 134). In education, this group of transnationals is represented by what Vandrick (2011) terms the SONGEs—affluent international students in US-based universities who have studied, lived, and vacationed in two or more cultures with which they are highly familiar. Although this group of transnationals is also liable to marginalization from the host context, they are capable of preventing negative identity formation. In her study, Vandrick describes this group of transnationals as having "a firm sense of their privileged identity that is rooted in their countries of origin . . . [which] helps them ignore or deflect negative experiences such as racist comment" (p. 162) while they "do not feel they completely belong anywhere" (p. 163). The participants in her study, in contradiction with some of the abovementioned immigrant students, are not remote to their home cultures and utilize their sense of belonging attached to their places of origin to significantly reduce negative psychological impact resulting from marginalization. Surprisingly, the factor of competence in English may not be a key determinant in identity formation as one of the participants in her study, Andrew, "despite his limited English language ability, found a community and an identity as a valued member of the school football team [in the host society]" (p. 164). The case of SONGEs, along with that of immigrants, shows the importance of treasuring rather than disregarding, or even subtracting, one's home culture in identity development

involving two or more cultural influences. Although a primary goal of BE is to enhance students' language proficiency, teachers should also endeavor to foster an environment where students' respective cultures, both minority and dominant, are respected and cherished, which in turn will better prepare students for the increasingly globalized society and world.

Problems and Difficulties: Planning and Implementing BE Programs

The adverse effects of marginalization of migrant students and nonnative English-speaking teachers call for attention from BE program planners, policymakers, and practitioners. For instance, of some BE programs for international students, the purpose is to assimilate learners into the host context in which their native languages are unvalued or even devalued, and often this group of students feel marginalized and demotivated toward learning. In a similar vein, in some ethnically diverse mainstream BE classes, students' command of a vernacular form of the target language, such as African-American Vernacular English, is disparaged to the degree that its users are categorized as ESL students. Besides students, in many BE programs, prevalence of native-speakerism pressures nonnative language teachers to perceive themselves as inferior and thus undermines their emotional well-being and authority.

Research on the relationship between BE programs and their participants' identities have cumulated significant insights and implications for reconceptualizing and refining BE practices. It has been argued that BE programs should respect and appreciate students' heritage languages and revisit language ideologies enacted on a regular basis so as to avoid, consciously or unconsciously, marginalizing migrant students' linguistic and cultural resources. This suggestion has been realized in some English as a second language (ESL) programs which migrant students attend before entering mainstream education. As some researchers, including Cohen (2008), observe, acknowledging the home language as assets in classroom interactions tends to result in higher academic achievement, cognitive development, and affective engagement with learning. However, often these suggestions have yet been tapped into, in teaching or policymaking for the majority of BE programs. It is suggested that in making curricular and pedagogic choices related to BE programs, they should be aware of the aforementioned issues with reference to up-to-date literature. For instance, teachers should help in creating an atmosphere where students with different backgrounds, particularly in terms of language or ethnicity, can stand on equal footing in classroom participation by focusing on students' individual learning processes and promoting their utilization of different linguistic and semiotic resources rather than linguistic accuracy or standards (Canagarajah 2013).

Transnationals, who shape their identities with reference to discourses regarding their language and cultural background in contexts they shuttle through, have their own difficulties. During the integration process with new contexts, although some

may comfortably relish their double/multiple membership (Vertovec 2009), some may feel that they have become or are becoming “others” to both sending and receiving contexts (Hornberger 2007, p. 326). The creation and selection of these different senses of belonging depend on various factors, including the attitudes of people receiving them, supports available for them in adjusting to both or possibly more communities (Baker and Jones 1998), and emotional ties to both contexts. In some cases, the construction of membership may transcend geographically conceived and defined notions: transnational experience may occur through participation in “virtual neighbourhoods” (Appadurai 1995, as cited in Vertovec 2009, p. 12) and interactions with people from other spaces, which may result in “translocalities” (p. 12) featuring “difficulties of relating to, or indeed producing, ‘locality’” or loss of an identity associated with a real, existent community.

The issue of losing a definite identity has long been problematized. However, Lin (2008), who notes that translocalities are not restricted to transnationals but may be one of the features of the modern human condition, questions the need to construct a coherent account of self for all. A translocal conception of identity drawing on transnationals’ experience of multi-literacy practice and its relation to the development of their positive identities may be a valuable point of departure to understanding learner identity in a multicultural context. As some researchers (e.g., Canagarajah 2013) suggest, providing learners with a reference to actively bricolage their respective home or community language assets into classroom interactions where students openly discuss the merits of linguistic diversity under teacher guidance will be the first step to assist ethnolinguistic minority learners in building positive identities, even with the absence of a particular locality to be indexed.

Conclusion and Future Directions

This chapter has discussed existing research related to identities of learners and teachers in BE. Learners may develop positive or negative self-concepts based on their experience in a BE program: when their perceptions of their language and cultural assets are positive, they tend to develop more positive and strong self-conceptions, which may contribute to their academic achievement. When these assets are ignored and problematized, learners are marginalized and may lose motivation for developing the target language; as a result they may view themselves unfit for and inferior in the receiving society. It has been argued that with research-informed decisions, BE programs can contribute to academic success for all as well as social equality. On the other hand, the chapter has also summarized and presented studies revealing how teachers’ identities govern pedagogy in BE which may project positive or negative views on students’ language assets and thus may result in additive or subtractive bilingualism. It has been discussed that the development of teacher identity is subject to discourses on different levels including deep-seated social issues, changes in the society, as well as engagement in the professional community.

It later paid focused attention to identities of transnationals, who have the potential of viewing their native languages and their selves from both insider and outsider perspectives, unlike their mono-contextual counterparts who are with comparably fewer opportunities for transnational communication (e.g., ethnic minority students who have been marginalized in a particular context). Although transnationals may also face marginalization from the host context, in some cases, learners who maintain and utilize transnational connections are able to develop a positive identity and they have shown to fare better academically. Similar to the identity development of mainstream learners and teachers in BE, transnationals' identity construction is heavily tied to how their ethnic origins and related features are perceived in a particular context, by themselves and others. However, research on transnationals' learning has focused on immigrants, while studies on the elite group of transnationals remain rudimental. In recognition of the future influence of this newly emerging group of transnationals, Vandrick (2011) calls for further investigation into SONGEs as the number of them is growing and they are likely to be in possession of "disproportionate power and influence in the world" (p. 168). Besides this new group of transnationals, in the following sections are some other potential areas of research in BE vis-à-vis identity.

Social Class

As Vandrick's (2011) study also finds that flexibility in school choices and geographical mobility, which depends heavily on economic capital, is positively correlated to their psychological strength to fend off marginalization, the case of transnationals sheds light on a missing link in bi-/multilingual studies identified by Block (2014). Borrowing theoretical perspectives in sociology, particularly those of Marx, Block argues that social class in the study of language education has been masked by discourses related to race, ethnicity, gender, culture, etc., and until this disregarded aspect of education has been given due consideration "changes at the institutional and educational practice level . . . will not go to the heart of the problem, which is class divisions as the inevitable effect of capitalism, a system that depends on inequality in education" (p. 115). Block (2014) then elaborates that middle class school learners in general surpass their working class counterparts in terms of school achievement because middle class families typically treasure a different set of values and behavior which allows their children to develop more easily the "feel for the game" (p. 129) required to excel in schools. This disparity in educational achievement, according to Genesee (2003, cited in Block 2014, p. 130), has not been noticeably reduced even through innovative bilingual programs embodying greater awareness of student diversity (e.g., two-way immersion programs). In view of the inadequacy of research into class positions in BE, Block calls for further examination of class-bound values, attitudes, and behavior of immigrant cultures and how English as a dominant language has been utilized to fortify social hierarchy.

Technology in Learning

As technology in learning has become more accessible and affordable, the relationship between the use of online platforms in BE programs and participants' identities should also be paid due attention. Scholars such as Ware (2004) found that ESL learners and teachers display and construct significantly different identities in face-to-face modes and through online learning. Research (e.g., Smith et al. 2001–2002) shows that online instructional modes establish a “democratic” relationship between the teacher and the learners, which has a direct bearing on teachers' identity by distancing teacher dominance and authority.

Teacher Identity in Changing Contexts

Teachers with multiple identities who comfortably subject themselves to varied discourses pursuing educational goals which conflict personal desires and values are another interesting potential area of research. Until now, the few BE research studies on teacher identities in reform contexts report teachers' difficulties in incorporating new pedagogies incompatible with their educational philosophies. However, resigning to adopt an identity which conflicts with their current selves but is promoted by a reform can be an identity option as some teachers make a separation between self and occupation, as some studies in the field of policy implementation have reported (e.g., Ball et al. 2012). Adopting such an “incoherent” identity may be one strategy for teachers to survive in an era where frequent educational reforms have taken place worldwide.

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Sign Bilingualism in Deaf Education

From Deaf Schools to Regular School Settings

Gladys Tang

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Abstract

In recent decades, empirical evidence from sign linguistics research has confirmed the natural language properties of sign languages used by Deaf members of the society. One consequence is to reintroduce sign language into the classroom for the deaf, to rectify the ban on sign language and Deaf teachers during the Milan Congress in 1880. Such a move led to the establishment of *sign bilingualism* in educating deaf and hard-of-hearing (DHH) students in deaf school settings. However, development of this approach constantly faces the challenge of oralism (i.e., the use of oral language with residual hearing only) supported by advanced

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assistive hearing devices until today, regardless of educational settings. This chapter addresses the combined effects of adopting *sign bilingualism* and *co-enrollment* in regular school settings where DHH and hearing students are supported by the collaborative teaching of a hearing teacher and a Deaf teacher in a bimodal bilingual fashion.

Keywords

Coenrollment • Deaf Education • Deaf Teacher • Sign Bilingualism • Sign Language

Introduction

Language in raising and educating deaf and hard-of-hearing (DHH) children has consistently been under debate. Oralism supported by assistive hearing technology like hearing aids and cochlear implants basically predominates the field of practice; and due to misconceptions about sign language, manualism (i.e., use of sign language) is ascribed with secondary importance, if not regarded as “the untouchable.” Nowadays, children suffering from severe to profound hearing loss with or without additional disabilities or failing to demonstrate gains in auditory-oral development despite support of assistive hearing devices are channeled into deaf schools, for better individual attention and sometimes with sign language support. This controversy between a pathological or a linguistic view toward raising and educating DHH students persists until today (Marschark and Spencer 2010, 2011; Spencer and Marschark 2010).

In fact, back in the 1960s and 1970s when sign linguistics emerged as a subdiscipline of linguistic study (Klima and Bellugi 1979; Stokoe et al. 1965), deaf schools that endorsed sign language became the cradle for the initial development of *sign bilingualism* (i.e., acquisition of sign language and spoken language literacy), amid the general disappointment with the oralist approach toward educating DHH students during that time. However, when sign language was perceived as the language of the Deaf and used in deaf schools, sign bilingualism seldom surfaced in mainstream education.

Can sign bilingualism partner with advanced hearing technology to support DHH students’ education? Newborn hearing screening with prescriptions for hearing aids or cochlear implants seems to suggest that in time individual DHH children will be able to pick up speech in order to venture into the classroom with confidence and success. The reality is that some of these DHH children still lose the windows of opportunities for language acquisition due to ineffective pathological intervention at the initial stage of language acquisition, and, at the same time, lack of access to language through sign language (Humphries et al. 2012).

In this paper, we propose that, given the current support of assistive hearing technology, the modality of communication as involved sign bilingualism as developed in deaf schools can be extended to cover not only sign language and spoken

language literacy but also oral language. Moreover, we argue that there is no physical boundary for practicing sign bilingualism. With modifications, this approach can be established in regular school settings within the general rubrics of inclusive education for the deaf (see Stinson and Antia (1999) for an earlier review of research findings on this approach). Linguistically, sign bilingual mainstream education for the deaf can assume the form of bimodal bilingualism, i.e., acquisition of both a sign language and a spoken language either simultaneously or sequentially, depending on the timing of linguistic exposure to the two languages. To achieve such a goal, sign bilingualism needs to partner with *co-enrollment* in mainstream education, meaning that a critical mass of DHH students be brought into the regular classroom to study with a group of hearing students, usually in the ratio of one DHH student to three or four hearing students (Tang et al. 2014). Over time, both groups of students become bimodal bilingual users of the school community and see each other as partners in the same educational process.

Sign Bilingualism and Co-enrollment

Sign Bilingualism in Deaf Education: In Search for a Linguistic Orientation

As said, *sign bilingualism* was originally associated with educating DHH students in deaf school settings via the use of a sign language to promote spoken language literacy (Hoffmeister 2000; Padden and Ramsey 2000; Wilbur 2000). Traditionally, it stemmed from the concern for developing a linguistic and cultural model of deafness, using the premise that sign language is the first language of the minority Deaf community;¹ hence, an appropriate system had to be devised to legitimize the use of sign language in educating DHH students. Back in the 1980s, sign bilingualism was introduced to the schools for the deaf in the Scandinavian countries, the United States, the United Kingdom, as well as Australia, and has since spread to many countries in Asia (Swanwick et al. 2014; Wu 2008; Woodward and Hoa 2012). Cummins' Linguistic Interdependence Hypothesis (LIH) developed in the 1980s to account for bilingual education in spoken languages also held a great appeal to educators for the deaf who promoted sign bilingualism in deaf education (Cummins 2006). When applied to the deaf learning condition, the LIH stipulates that, given a common underlying proficiency among languages, development of a strong conceptual and linguistic foundation in sign language at an early age facilitates transfer of such knowledge to spoken language, thereby supporting literacy and academic skills development in the long run. In recent years, LIH has been challenged by

¹In research on sign language, Deaf with a capital letter D refers to those individuals that use and accept sign language as part of their identity and culture, while deaf with a small letter often refers to those oral deaf people who are brought up in the auditory-oral mode and who may not avail themselves of sign language or interact with members of the Deaf community.

researchers of deaf education particularly on grounds of inadequate sign language input as a first language at home, as 90 % to 95 % of parents are hearing and do not have this linguistic resource as first language to support their DHH child. Clearly, the signing of hearing teachers being second language learners themselves is also a concern (Knors and Marschark 2012). Some also argued that the lack of a written mode for sign language weakens the argument of using this language to support DHH students' literacy development (Mayer and Leigh 2010).

Research on childhood bilingual acquisition in recent years has documented the importance of naturalistic input of a second language through early bilingual education (Paradis et al. 2011). In many countries, implementing bilingual and multilingual programs is the norm rather than the exception. Under those circumstances, children as young as age 2 or 3 begin to acquire an additional language through exposure to it at day care centers and kindergartens, sometimes alongside their first language. Rinaldi et al. (2014) argue that such learning conditions in Italy nurture bimodal bilingualism for young DHH children when parents request sign language for their child in public day care centers and regular elementary schools.

The emergence of bilingual acquisition as an autonomous research paradigm has also created an impact on sign language acquisition research. In recent years, focus has been shifting from a monolingual to a bilingual perspective, to capture the processes that occur in DHH children's bimodal bilingual acquisition (Baker and Van den Bogaerde 2008; Fung and Tang 2016; Lillo-Martin et al. 2012).

While one must caution that there is no straightforward transfer of bilingual theories and practice in the hearing context to the deaf context, insights from such research instill new interpretations on sign bilingualism in deaf education, in particular, how best to gauge the complex acquisition phenomena in the transition from home to school among the many DHH students born to either Deaf or hearing parents. Bimodal bilingualism for DHH or hearing children capitalizes on exposure to early, dual language input to trigger bilingual acquisition. A recent study by Lillo-Martin et al. (2012) demonstrated that the linguistic outputs of hearing bimodal bilinguals (i.e., hearing children born of Deaf parents) were qualitatively different from their monolingual counterparts, although they achieved the desirable acquisition outcomes in the respective target languages. Based on longitudinal and experimental data, they observed bidirectional, crosslinguistic transfer between a sign language and a spoken language (i.e., American Sign Language vs. English and Brazilian Sign Language vs. Brazilian Portuguese). Focusing on crosslinguistic transfer, they assumed that bilinguals have at their disposal two independent but interactive linguistic systems; therefore, bidirectionality of transfer of linguistic elements is a natural acquisition outcome which was mistakenly taken to be linguistic confusion previously. Lillo-Martin et al. (2012) further argue that such processes of language synthesis will persist into adulthood, a characteristic of bimodal bilinguals. To sum up, recent research on bimodal bilingual acquisition further justifies the linguistic benefits of adopting sign bilingualism in deaf education especially at an early age, regardless of hearing status, hearing loss levels, parental backgrounds (i.e., whether Deaf or hearing), or even types of assistive hearing devices.

Migration of Sign Bilingualism from Deaf School to Regular School Settings

As said, traditional sign bilingualism implemented in deaf school settings emphasized early sign language input as first language to bolster literacy development in spoken language at subsequent stages. Given this theoretical backdrop, it is understandable why oral language training with assistive hearing devices was originally not perceived as equally important to DHH students as sign language. According to Spencer and Marschark (2010), views on the effectiveness of sign bilingualism in promoting literacy development continue to be polarized. In recent years, the pendulum seems to have swung to the oralist end again because advancement in cochlear implantation has demonstrated improvement in speech perception, although outcomes are still diverse. Yet, medical advancement together with the shift to inclusive education has resulted in more and more DHH students receiving education in regular school settings, leading to a reduction of deaf schools and the scale of sign bilingualism being practiced there.

In some countries, sign language manages to enter regular schools as part of the “support services” for isolated DHH students. This service is usually rendered by an external aide, usually an itinerant teacher, a teaching aide, a deaf paraprofessional, or simply an educational interpreter, who visits the classroom at regular intervals. The quality of such service, in particular, the signing skills of the service provider, has been consistently called into question (McKee 2008; Russell 2010; Schick et al. 2006). In other words, sign language in those contexts is only seen as a pedagogical tool for conveying curriculum contents through a third party, rather than a language of social interactions among the core participants – teachers and students. Hence, speech by the regular teacher and hearing students predominates, and sign language is relegated to the interactions between the DHH student and the external aide only. Understandably, such interactions contribute little to the general classroom discourse except for some occasional “mediated” exchanges between the peers or the regular teacher and the DHH student, through the signing external aide. As such, individual DHH students enrolled in a regular setting requesting sign language support are being epitomized as “marginal bilinguals.” Conflicts thus arise sometimes between practicing sign bilingualism to satisfy the linguistic and social needs of DHH students, as against adopting sign language as an ancillary communication mode to support the DHH students’ education in the classroom. With very little chance for participating in classroom discussions and social interactions, the DHH students are rather isolated in the mainstream learning context (Schick et al. 2006).

How feasible is it to incorporate sign bilingualism into the mainstream setting? One crucial ingredient would be the nurturing of a bimodal bilingual environment to encourage direct and spontaneous interactions between the DHH and hearing participants within the school context. This creates opportunities for ample, dual naturalistic input to trigger early bilingual acquisition of not only the DHH but also the hearing students, as well as the hearing regular teachers in the classroom. Under those circumstances, one has to subscribe to the tenets that (a) both the sign and spoken languages in the classroom are equal in linguistic status, (b) DHH

students are equal partners with hearing students in the educational process (i.e., class membership), and (c) the use of assistive hearing technology and speech/language training are given more prominence than what traditional sign bilingualism offered in the past.

Creating a sign bilingual community for both DHH and hearing students to participate fully is easier said than done. The small DHH population (i.e., statistically 1 in 1000 live births is diagnosed as having potential hearing loss) makes it difficult to cluster them in regular settings especially in their neighborhood in order to create an educational context with members that who are bimodal bilinguals (Hermans et al. 2014).

Co-enrollment

Knoors and Marschark (2012) argue that, for sign bilingual education to be appropriately implemented to benefit DHH students, increasing the size of deaf enrollments in the educational context is one possible solution to resolve the problem of having lonesome “deaf singletons” struggling on their own in the classroom. They further suggest that co-enrollment is a potential direction for future deaf education.

First, co-enrollment changes the ecosystem and mode of communication of a regular classroom through having a critical mass of DHH students who study and mingle with a larger group of hearing students. Second, it promotes partnership between sign language and spoken language in the creation of a bimodal bilingual learning environment, to support DHH students’ inclusive education (Kirchner 1994). It was originated from The TRIPOD Program in California in 1982 and aimed to remove the pitfalls as a result of inclusive education for the deaf. According to Kirchner, co-enrollment embraces a set of pedagogical procedures to safeguard (a) direct communication between the DHH and hearing members in the classroom (i.e., the “no interpreters” approach), (b) equal access to a regular curriculum through team teaching between a regular teacher and a teacher of the deaf in both a sign language and a spoken language, (c) DHH students’ socio-emotional development by creating a peer group of both DHH and hearing students that shares common linguistic resources and flexibility of code choice, and, above all, (d) the opportunities for engaging DHH students in academically challenging tasks. In the Tripod Program, both DHH and hearing students have demonstrated positive gains in social behaviors and academic skills, at least considerably above what is normally expected of DHH students at similar age levels elsewhere, including deaf school settings. The program has also been well received by parents. For the teachers, team teaching enhances professional experiences in supporting students with special needs as well as the learning of an additional language. Clearly, professional training for the regular hearing teachers is required in areas like strategies to tend to DHH students’ needs as well as strategies for teaching collaboratively with a signing Deaf teacher.

More and more co-enrollment programs have been documented worldwide at the turn of the century – a program in Tucson, Arizona (Antia and Metz 2014); the Twin-School Program in the Netherlands (Hermans et al. 2014); a few programs in Italy

(Rinaldi et al. 2014); two in Taiwan (Hsing 2014); one in Japan (Torigoe 2014); four in Madrid, Spain (Pérez Martin et al. 2014); and three in Hong Kong (Tang et al. 2014; Yiu and Tang 2014). All co-enrollment programs nowadays endorse the use of natural sign language as the language of instruction, although use of manually coded spoken language is also reported in some programs. Manually coded spoken language refers to a mode of signing that is based on the grammar of spoken language. It is regarded as artificial signing and not a language in its own right (e.g., Signed English vs. American Sign Language, Signed Chinese vs. Chinese Sign Language, Signed Dutch vs. Sign Language of the Netherlands). In a co-enrollment classroom, dual language input is provided by the regular hearing teacher who teaches in an oral language and a teacher for the deaf who signs. Note that in a co-enrollment classroom, both teachers, Deaf and hearing, are tending to the educational needs of both DHH and hearing students, whichever medium of instruction they adopt. Incorporating a sign language into a regular school setting thus supports both DHH and hearing students to access the same and regular curriculum. For hearing students who start to be immersed in a sign bilingual environment at a young age also means they will become linguistically competent in a sign language, using it to facilitate comprehension of curriculum contents in class, in case obtaining them through the hearing teacher's speech fails (Tang et al. 2015).

Empirical Evidence

Language Performance and Academic Attainment

Since sign bilingualism and co-enrollment in deaf education is a relatively new approach toward educating DHH students, published empirical evidence to evaluate its effectiveness has just begun to emerge, and the results have been quite encouraging, especially in areas like language skills and socio-emotional development (Marschark et al. 2014). Preliminarily, a number of studies have reported positive gains in literacy development in spoken language. Kreimeyer et al. (2000) found that DHH students who had 2–3 years of co-enrollment experiences fared better than those from deaf schools in a reading comprehension test based on the Stanford 9 Achievement Subtest. However, these co-enrolled DHH students still lagged behind their hearing age peers. Similar results were reported by McCain and Antia (2005) in the reading comprehension of five DHH students after 4 years of co-enrollment. Similarly, Hermans et al. (2014) observed a significant growth rate in receptive vocabulary in Dutch with their twelve DHH students in the Twin-School Program, although a gap still existed when compared with the hearing age norms. Initial positive gains in vocabulary knowledge were also found with a group of co-enrolled DHH students studying in four sign bilingual, regular schools in Madrid (Pérez Martin et al. 2014). Eight out of 12 young DHH students tested on the spoken Spanish Child Development Inventory (López-Ornat et al. 2005) had scores above age norms. Also, all older children (i.e., 11 subjects) revealed age-appropriate development based on their vocabulary scores of PPVT-III Peabody (Dunn et al. 2006)

and the Spanish version of K-Bit (Cordero and Calonge 2000). The only difficulty these older children seemed to be facing was their grammatical knowledge of Spanish. In the Asian context, Tang et al. (2014) tested the effect of 5 years of sign bilingualism and coenrollment education on the language development of a group of 20 DHH students, and found a positive correlation in terms of their grammatical development between oral Cantonese, written Chinese which is based on Mandarin grammar, and Hong Kong Sign Language. This result dispels the long-standing misconception that acquiring sign language impedes the development of spoken language of DHH children.

There has been little research on the oral language development of co-enrolled DHH students. In the Madrid program, except for one deaf child, ten DHH students with 0–24 months hearing age at the time of assessment (i.e., after 1 year of co-enrollment) showed auditory development above their hearing age norms. However, the assessment was only based on a parental questionnaire, and objective measurements are necessary in future research.

Turning to sign language skills, the DHH students of the Twin-School Program in the Netherlands were reported to be able to maintain a higher than average level in their development of phonology, vocabulary, and grammar in the Sign Language of the Netherlands, despite the fact that they had switched from a special school (i.e., with more opportunities for sign language exposure) to a co-enrollment setting presumably with less exposure to sign language (Hermans et al. 2014). In the Madrid programs, the researchers measured the sign vocabulary of eight co-enrolled DHH students who were aged between 23 and 42 months and had 15–24 months of exposure to LSE (i.e., Spanish Sign Language). Using an adapted vocabulary test (i.e., CDI for American Sign Language), they found a significant increase in these children's vocabulary size over a span of 12 months. As for grammatical assessment in LSE, these researchers used an adapted test from the British Sign Language Receptive Skills Test and found a significant increase in their receptive signing skills (Woolfe et al. 2010). They ascribed the results to the ample opportunity for sign language input in the sign bilingual and co-enrollment environment, which they failed to obtain at home as most hearing parents were hearing and had very little experience in sign language before.

Not much has been documented regarding the DHH students' academic attainment in a co-enrollment context. The study by Kreimeyer et al. (2000) found no significant differences in the scores of mathematics skills (i.e., problem solving and procedures) between the co-enrolled DHH students and DHH norms (i.e., DHH students of deaf schools). However, in one analysis, although the co-enrolled DHH students performed significantly worse than their hearing age norms after 2 years of co-enrollment, their performance was comparable by the end of the third year. Therefore, it seems that the longer the DHH students undergo co-enrollment education, the better they are able to catch up with their hearing age norms in mathematical skills. Hermans et al. (2014) also reported results of standard assessments in reading comprehension, mathematics, as well as spelling, and found that, on average, the co-enrolled DHH students'

performance was below their hearing classmates. Only a few of them performed better than their hearing peers. They argued that the positive or negative effects of co-enrollment were sometimes difficult to determine due to the small sample size and mobility of the DHH students who switched between the special school for the deaf and the regular school.

Social Integration

Evidence on social integration between DHH and hearing students in co-enrollment programs is generally quite positive. Kluwin (1999), examining the long-term effects of co-enrollment on self-concept, found no differences between DHH and hearing students on aspects such as school status, popularity, satisfaction, happiness, as well as degree of loneliness. The researcher concluded that the socio-emotional advantages brought about by co-enrollment were definitive. Antia and Metz (2014) further confirmed the positive outcomes in terms of peer acceptance and an increase in opportunities for social interactions between the DHH and hearing students. The 17 cochlear implanted children from the Madrid program also showed good socio-emotional development in terms of social competence and general adaptation. According to the researchers, the opportunity to use both sign and spoken languages at an early age increases the frequencies of interactions between the DHH and hearing students over time, thus collectively building a bimodal bilingual community and nurturing class membership. Yiu and Tang (2014) also observed highly positive peer acceptance between the DHH and hearing students, as well as positive self-image among the DHH students in their co-enrollment program in Hong Kong. They attributed it to the inclusion of a Deaf teacher in the classroom daily, serving as a sign language model and a social role model of a facilitator in the educational process not only of the DHH but also hearing students. For the coenrollment program in the Netherlands, Hermans et al. (2014) showed less positive results. They surveyed 16 co-enrolled DHH students and 96 hearing classmates using procedures like peer rating and peer nomination. While DHH students appreciated the company of DHH peers in the classroom, affirming the critical mass proposal of co-enrollment, the ratings between the DHH and the hearing classmates toward each other were significantly less positive. They attributed these results to the tendency of DHH students to cluster as a subgroup, which in turn generated some negative perception by the hearing peers. In their program, the Deaf teacher only visited the co-enrollment school a couple of times a week to teach sign language, while a hearing teacher of the deaf participate in regular classroom teaching during some periods of the timetable. They agreed that it might be more beneficial if Deaf teachers are given a more prominent role in future, to strengthen the DHH students' social position in a co-enrollment classroom. Certainly, giving Deaf teachers a more prominent role than just teaching sign language in school would enhance their status of a collaborative teacher in the co-enrollment classroom.

Discussion and Conclusion

The empirical evidence for effectiveness of sign bilingualism and co-enrollment in deaf education has been accumulating, largely showing positive gains in vocabulary, grammar, reading comprehension skills, mathematical skills, as well as socio-emotional development. Yet, the perennial concern from educators of the deaf remains that DHH students' performance lags behind their hearing age norms in language, literacy, as well as academic attainment. Clearly, whether or not one should define success in intervention in deaf education only in terms of DHH students reaching hearing age norms in all respects remains a moot point. At least, linguistically, these children are undergoing bilingual rather than monolingual acquisition hence, possibly, the quality of the state of knowledge of their ultimate attainment might be quite different (Baker 2014; Montrul 2008). As far as the current approach is concerned, the crucial ingredients for success seem to depend on whether the DHH and hearing participants, teachers and students alike, become bimodal bilinguals eventually. The constant presence of a Deaf teacher as a member rather than an outsider of a sign bilingual classroom also helps to sustain bimodal bilingual acquisition, as well as to raise Deaf awareness among the participants in the co-enrollment classroom. Yiu and Tang (2014) suggested that the co-teaching practices between the hearing and Deaf teachers in such classrooms eventually entice DHH and hearing students to set up their own expectations about Deaf-hearing collaborative learning. The current approach has revealed that, if given the right ingredients, sign language is no longer confined to the language of the Deaf only, but becomes part of the common linguistic resources for classroom learning and social interactions between the Deaf and the hearing participants. Also, for DHH students, the facility of using speech to communicate in a regular school context also creates a new capacity for them to code switch or code blend when interacting with either hearing or Deaf people in society.

While preliminary results of co-enrollment are quite encouraging, one has to admit that the deaf education context is very complex and the backgrounds of the DHH students are hugely diverse. In many countries additional resources have been channeled into the classroom to support the learning of children with special education needs. In fact, in the co-enrollment context, the resources can be used to hire Deaf teachers, or under specific conditions, hearing teachers who are fluent signers and who appreciate the nature of being Deaf. In this way, the sign bilingualism and coenrollment approach will stand a better chance of success in providing support, not only for DHH but also hearing students. Certainly, more professional training for teachers especially in sign language, deafness, and collaborative teaching is necessary. In terms of research, findings about the effects of sign bilingualism and co-enrollment on educating DHH and hearing students, however encouraging initially, need to be further verified in future.

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Cross-References

- ▶ [Language Rights and Bilingual Education](#)
- ▶ [Teaching for Transfer in Multilingual School Contexts](#)
- ▶ [Translanguaging in Bilingual Education](#)

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Part III

**Bilingual and Multilingual Education in Asia
and the Middle East**

Bilingual Education in Hong Kong

Miguel Pérez-Milans

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Abstract

The field of bilingual education in Hong Kong provides a perfect window to study the transformation of education in the context of wider processes of economic, institutional, political, sociolinguistic, and cultural changes. As Hong Kong changed from a British colony to a Special Administrative Region (SAR, hereafter) of the People's Republic of China, the space of language education has seen the overlapping of old and new discourses regarding what languages should be learned or taught, by whom, when, and to what degree. Such discourses and the related policies which have contributed to their institutionalization cannot be detached from shifting conditions as to who gets to decide what language repertoires are attributed value in which sociolinguistic markets vis-à-vis local and translocal processes of destabilization of the modern politics of language and culture.

This entry traces major works that have reported and described these processes, with attention to their implications for the existing language-in-education

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policies and practices in contemporary Hong Kong. Recurrent problems and future directions for research are also discussed.

Keywords

Bilingual education • Hong Kong • Sociolinguistics • Language ideology • Language policy

Introduction

As Hong Kong changed from a British colony to a Special Administrative Region (SAR, hereafter) of the People's Republic of China, the space of language education has seen the overlapping of old and new discourses regarding what languages should be learned or taught, by whom, when, and to what degree.

Such discourses and the related policies which have contributed to their institutionalization cannot be detached from shifting conditions as to who gets to decide what language repertoires are attributed value in which sociolinguistic markets vis-à-vis local and translocal processes of destabilization of the modern politics of language and culture.

This entry traces major works that have reported and described these processes, with attention to their implications for the existing language-in-education policies and practices in contemporary Hong Kong.

Early Developments

Research on bilingual education in Hong Kong has focused on description of the unequal value assigned, in education, to English and Chinese (usually practiced in Hong Kong as spoken Cantonese and written Standard Mandarin Chinese)¹ since Hong Kong was ceded by the Qing Dynasty to Britain as a colony in 1842. In the context of a colonial socioeconomic and political mode of organization, tied to the rise of the European bourgeoisie in the nineteenth century and to its interests in expanding economic activities both within and among unified national markets, these two languages became framed within a diglossic relationship in Hong Kong. On the one hand, English was associated with access to higher education and elite jobs and social networks. On the other, knowledge of only Chinese was linked to less well-to-do families. Thus, English was historically constructed from the outset as a “symbolic capital” (Bourdieu 1991) in the socioeconomic market of Hong Kong,

¹The use of “Chinese” as a vague umbrella label to refer to spoken Cantonese and written Standard Mandarin Chinese, by the policy documents in Hong Kong, is an inherited practice from the British colonial government who allowed Cantonese some space by not naming it but covering it under the umbrella term “Chinese.”

that is, as a key gatekeeper upon which class-based hierarchical structures have been reproduced and legitimized.

The process by which this unequal socioeconomic distribution of English and Chinese has been gradually institutionalized and legitimized in Hong Kong's education system was documented through three major contributions (see historical reviews by Sweeting 1990; Lin 1997). Firstly, Eitel (1890–1891) collected and compiled information from missionary and governmental sources, regarding the history of education in Hong Kong from 1841 to 1878, which allows identification of the first introduction of English in government-aided schools in 1853. As a missionary, educator and Head of the Education Department of the government, Eitel reported on complaints by European residents who felt “that the whole educational energies of the Colony served almost exclusively to benefit the Chinese and promoted Chinese literature, whilst the children of European and other non-Chinese residents were (owing to their unwillingness to attend what were virtually Chinese schools) almost entirely neglected” (Eitel 1890–1891, p. 322, cited in Sweeting 1990, p. 147).

Secondly, Irving (1914) characterized education in Hong Kong during the 1910s and correlated the increasing demand for English-Chinese bilingual white-collar workers with the growth of a fluctuating-but-generally-expanding economy. This period saw the transition, from a disorganized and missionary-based system to an incipient bureaucratic-based structure legitimized and empowered by the first Education Ordinance of 1913. Irving's description sheds light on the constitution of a linguistically streamed school system derived from the strengthening of two relatively new social classes in Hong Kong, namely, wealthy westernized Chinese and working-class Europeans.² This led to conformation of a dichotomized educational structure composed of an English-medium channel up to university level, serving the aspirations of those who aimed to occupy the new emerging middle-class labor market (i.e., the abovementioned two new social classes) as well as of political elites willing to culturally reproduce their social status, and a Chinese primary education stream providing basic skills for the rest of the population.

The third was the *Burney Report*, published by a British education inspector (Burney 1935), which carried forthright criticism of Hong Kong's educational policy and represented a turning point towards a period of vernacularization during the first half of the twentieth century, under the influences of anti-imperialist and self-reforming cultural and political movements in Mainland China such as the May Fourth Movement of 1919, the New Life Movement of the late 1920s and 1930s, and the consolidation of the Chinese Nationalist Party in 1928 (see Cheng 1949, for

²In contrast to monolithic portrayals of social groups where Europeans are repeatedly characterized as upper middle classes, and ethnically Chinese as working class, sources from this period show social class discrimination as led by wealthy Chinese groups and citizens as well. Some of these groups submitted several petitions to the Governor asking for a separate school for European children, or even for the establishment of a school where higher fees than those paid at schools run by Europeans may be charged, with the aim of avoiding the association of their children with the poorer classes in English-medium schools (Sweeting 1990, p. 196–199).

further details). Burney stated that the Hong Kong government was neglecting primary education in vernacular language as it was left in the hands of out-of-date private schools. Burney recommended the provision of primary education in Chinese as well as a stronger orientation of the educational system to the needs and interests of Hong Kong society.

Though Burney's recommendations resulted in some government support being extended to Chinese-medium schools in the 1930s and 1940s, the situation was soon reversed by the establishment of the People's Republic of China in 1949. According to Lin (1997), the isolationist policies of the Chinese Communist Party (CCP, hereafter) led to a decline in popularity of the Chinese-medium schools in Hong Kong "because there no longer existed as an alternative, attractive symbolic market offering higher studies and job opportunities for Hong Kong Chinese medium school graduates" (p. 281). The subsequent policies and debates are described in the following section, with reference to shifting political and economic conditions at both local and translocal orders.

Major Contributions

Further work done since the 1950s has shown how language-in-education policies and practices in Hong Kong cannot be detached from the dilemmas and struggles faced by the local elites over the imagination of the modern configurations of language, nation and State, in the context of the transition from a British colony to a Chinese SAR. Before the handover to China in 1997, Hong Kong's bilingual education was caught in between the plans for national modernization implemented by the CCP and those of the British Empire.

In a post-World War II scenario characterized by cultural imaginaries reinforcing an overarching polarization between the "democratic West" (i.e., liberal) and "the rest" (i.e., communist), Britain's preparations for decolonization of Hong Kong paved the way for institutionalization of a community linguistically and culturally differentiated from Mainland China – being this strategy economically and politically supported by USA in its attempts to prevent the expansion of communism in East Asia. This decolonization involved several means, including: localization of the civil services (i.e., increase of the number of English-educated Hong Kong Chinese taking up high colonial offices); introduction of some democratizing elements in the political system (i.e., district board elections and popularly elected seats in the legislative council); and the expansion of a largely English-medium higher education (i.e., from a formerly elitist two-university system to eight publicly funded universities).

This combination contributed to the strengthening of "a local English-educated Hong Kong Chinese bilingual middle class that has benefited from and will continue to have strong investments in the English language and British-related institutions, whether political, linguistic or educational" (Lin and Man 2010, p. 75). Indeed, more than 90 % of secondary schools became English-medium by the

1980s and the early 1990s even though the British Hong Kong government's policy over medium of instruction (MOI, hereafter) was based on a *laissez-faire* mode which allowed schools to choose either Chinese or English as the medium of instruction.

After the handover to China, the cultural, linguistic, political, and socioeconomic differences between Hong Kong and the rest of the People's Republic of China were reconciled through the constitutional principle of "one country, two systems" formulated by Deng Xiaoping. However, MOI policies for all primary and secondary schools have been issued and reshaped in different directions over the last two decades, in a post-colonial policy-making context characterized by deep contradictions at all educational levels (see historical reviews provided in Ho et al. 2005). Although these contradictions are due to multiple factors, the pressure over education to meet both Chinese national and global agendas emerges as particularly relevant.

These pressures are manifest in the gradual shaping of the curriculum. With the aim of shifting towards a high value-added and technology-based economy which targets both the international and the Chinese national markets, the Hong Kong curriculum has progressively allowed greater room for promotion of Chinese patriotism, nationalism, and cultural identity while maintaining the "unique" political characteristics that place Hong Kong as a bridge between the best of the so-called "East" and "West" (Education Commission 1999). In doing so, this combination is discursively constructed as key "to develop a society which is outward-looking, culturally confident, free and democratic" (ibid, p. 10).

The contradictions resulting from such overlapping agendas are evident in the space of language education, which has been complicated with heated debates over changing symbolic values assigned to Chinese and English, as well as with introduction of Putonghua (i.e., Mandarin Chinese). Such contradictions are particularly indexed in three major policy developments, namely, the mandatory linguistic streaming policy, the policy to use Putonghua as the MOI of Chinese language and literature, and fine-tuning the linguistic streaming policy.

The mandatory streaming policy was put in effect in September 1998 and introduced Chinese as the medium of instruction in all government and aided secondary schools – taken to mean Modern Standard Chinese in traditional characters as the written MOI and Cantonese as the oral MOI – unless otherwise specified under special conditions. Out of the over 400 schools, only 100 were initially allowed to remain English-medium schools followed by a later adjustment to 114, based on the test results of their fresh intakes in English and Chinese. Although officially rationalized on the basis of cognitive and educational benefits of education in mother tongue, this policy has been related to both cultural nativism and economic instrumentalism. Regarding cultural nativism, this mandatory scheme contributed to re-elevate the status of Chinese, in line with the strengthening of Chinese culture and history throughout the curriculum of all subjects (Tsui 2004).

As to economic instrumentalism, the streaming policy has also been described as a strategic measure to solve what was perceived as a "problem" by the business

sector and employers during the 1990s. Given the predominance of English among secondary schools in the years prior to the handover, many students who did not have high enough proficiency to fully function in English-medium lessons ended up getting enrolled in English as Medium of Instruction (EMI) schools. This entailed teachers and students having to switch between English and Cantonese as a common meaning-making practice in the classrooms (see Lin 1996), and this was later officially deemed to be the cause for “declining language standards” (Lin and Man 2010, p. 76). Therefore, Hong Kong bureaucrats could have waited until after 1997 to face this perceived “problem” by framing the linguistic streaming policy within a postcolonial political legitimization argument that placed mother tongue at the center.

Nevertheless, this language education policy aroused marked public opposition from the start since it created a labeling effect between Chinese Medium of Instruction (CMI) and EMI schools. As English has become crucial to Hong Kong’s economic competitiveness as a financial center, and as the international language of “upward and outward mobility” (Johnson 1994, p. 177), knowledge of English has remained a matter of prestige, and parents in Hong Kong are still highly motivated to send their children to EMI schools. So the mandatory policy has been accused of downgrading the self-esteem of students, teachers, and administrators in CMI schools. This has also been regarded as a source of social stratification in that it hampers students’ exposure to English in CMI schools and reduces their opportunities to access a still-largely English-medium higher education system (see Lo and Lo 2014; Poon 2009; for further debates on effectiveness of medium of instruction in Hong Kong).

Following the mandatory linguistic streaming policy, use of Putonghua as the spoken MOI of a subject known as Chinese Language and Literature first appeared on the government’s agenda in 2002, based on rationalizing arguments that students would improve their Chinese writing skills if they are taught in Putonghua as the MOI (Chan 2003).³ In addition to the contradiction of highlighting the educational benefits of Cantonese mother-tongue education in a sociolinguistic market where English still remains a gatekeeper to higher education and better jobs, this posed further dilemmas.

On the one hand, Putonghua is not regarded as mother tongue by the vast majority of Hong Kong people (see more details on census statistics over time in Leung and Lee 2006). On the other hand, the view that oral proficiency in Putonghua leads to written skills in Modern Standard Chinese has been considered as ill-informed. In fact, Modern Standard Chinese has also literary sources from ancient Classical Chinese and from the regional varieties of the Chinese language which, as in the case of Cantonese, have inherited many ancient Classical Chinese

³Standard Written Chinese (both in traditional and simplified characters) has been described as based on the linguistic features of spoken Mandarin, which has led to numerous arguments about the learning difficulties that this poses to Cantonese speakers whose oral language does not share the same lexical and grammatical features of Mandarin.

expressions (Lin and Man 2010, p. 83). However, Putonghua has reportedly started spreading among upper middle classes in Hong Kong, hand-in-hand with the growing influence of the People's Republic of China in the new globalized economy and with the subsequent expansion of Mandarin-based language and cultural industries across the globe.

Later on in 2010, the policy was fine-tuned because of the public dismay caused by the 1998 mother-tongue CMI policy. Despite the Government Education Bureau having provided evidence that mother tongue education had helped students to achieve better academic results in the Hong Kong Certificate of Education Examination (HKCEE) (a secondary 5 school – leaving examination), as well as better access to higher education for students in CMI schools, a continuous decline in English language results of the Hong Kong Advanced Level Examination (HKALE) (a preuniversity public examination) led to a strong demand from the public for reinstating EMI in all schools at all secondary levels (see Tollefson and Tsui 2014, for a detailed review of statistical data, contextual factors, and perspectives involved in the debate around this latest policy).

The reported positive outcomes notwithstanding, the Hong Kong SAR government gave in and announced the elimination of bifurcation of schools into EMI and CMI. From the 2010–2011 school year onwards, secondary schools were given greater autonomy over choosing their MOI, in accordance with the criteria specified by the education authority, such as the requirement of the students' language proficiency, teachers' qualifications, and school-based support. Concerning the students' language proficiency, schools are now permitted to choose their MOI from CMI or EMI if they admit at least 85 % of their secondary 1 students from the top 40 % of Hong Kong students in terms of academic ability – this can be applied to individual subjects, sessions, or even classes if they fail to achieve this requirement.

With regard to teachers' qualifications, stricter requirements have been imposed on nonlanguage teachers if they are to adopt EMI to teach their subjects. According to the policy, teachers are now required to have a grade C (level 3) or above in English language of the Hong Kong Certificate of Education Examination (HKCEE) and a grade D or above in the use of English in the Hong Kong Advanced Level Examination (HKALE). In addition, they are also requested to attend at least 15 h of professional development activities every 3 years. As for the school-based support measures, the government provides more resources to enable CMI schools to improve their English learning environment; it also allows extended learning activities (ELA) during lesson time for junior secondary students to have more exposure to subject-related English while learning content subjects in the mother tongue, in order for these students to have a better transition to a senior secondary curriculum delivered in English – schools can strategically allocate a maximum of 25 % of the total lesson time of content subjects for ELA.

This set of policies and processes represents the major shifts concerning bilingual education in Hong Kong. I shall now turn to ongoing developments which further expand our understanding of contemporary educational, linguistic, and social transformations.

Work in Progress

According to Tollefson and Pérez-Milans ([forthcoming](#)), work in the field of language education policies should shed more light on the local mechanisms by which the modern politics of language and identity get destabilized under conditions of the so-called late modernity. They state that this focus involves closer examination of the widespread processes of late capitalism leading to the selective privatization of services (including education), the information revolution (associated with rapidly changing statuses and functions for languages), the weakening of the institutions of nation-states (with major implications for language policies), and the fragmentation of overlapping and competing identities (associated with new complexities of language-identity relations and new forms of multilingual language use).

In the educational space of Hong Kong, some of these processes are now being reported by ongoing work that shows how the intensification of linguistic and cultural diversity generates new dilemmas and tensions that impact the way schools deal with (and implement) language education policies. Due to space constraints, this can only be illustrated by briefly referring to two lines of ongoing research investigating issues related to mobility and equity. The first involves fieldwork on cross-boundary and newly arrived students from Mainland China, and the second focuses on the situated experience and trajectories of students with South Asian background.

Research on students from Mainland China suggests that their linguistic repertoires are institutionally devalued in the Hong Kong educational system (Yuen [2013](#)). Cross-boundary students are children with working-class socioeconomic backgrounds who reside in Mainland China – typically in border towns such as Shenzhen and Yantian – but who daily attend school in Hong Kong. This practice is common for various reasons. First, the cost of living is lower in Mainland China than in Hong Kong; second, mainland mothers usually have to wait for some years to secure the right of abode in Hong Kong; and third, moving to Hong Kong often involves the disconnection of working-class women’s established social and supportive networks. On the other hand, the term “newly arrived students” is used by the Hong Kong government to refer to students who have moved from Mainland China to Hong Kong within the first 3 years after they have become resident. In both cases, Yuen’s preliminary findings show that identification practices from the students tend to value Cantonese more than their home language variety which, in the context of the devaluation practices mentioned above, can be seen as an indicator of social assimilation rather than integration.

The research stream that explores the experience and trajectories of students with South Asian backgrounds is now thriving in reaction to the predominant quantitative work (Pérez-Milans and Soto [2014](#); Pérez-Milans and Soto [forthcoming](#); Soto [2015](#)). While Hong Kong public schools serve over 9,000 primary and secondary school students with South Asian backgrounds, most of them born in Hong Kong, these students face several difficulties, and in official figures and statistics, access to standard written Cantonese, adaptation to school life, and limited opportunities for further education seem particularly problematic. These conditions may perpetuate

their exclusion in Hong Kong, both in and out of public education, leading to a socially (and ethnically) stratified system.

Although there has been some consensus on the existence of these difficulties, most resources and policy measures focus mainly on academic factors and on creating “more suitable” Chinese language education programs for these students, without sufficient exploration of their social experiences. In other words, lack of access to Chinese language skills is assumed to be the main reason for this widespread failure among students with South Asian background, without taking even a close look at the ways in which these social processes are constituted through everyday situated practice. However, the findings by Pérez-Milans and Soto show that while there certainly are struggles over access to conventional Hong Kong-based Cantonese, the difficulties experienced by these students involve a broader range of socio-educational elements derived from their economic marginalization.

In relation to these youngsters’ school life, these findings also suggest that educational institutions do not bring about a truly cultural change in the school curriculum and organization, even though schools are now forced to open up to cultural diversity and to accept students other than ethnically Chinese in order to achieve the minimum intake required by the government’s funding policy. So these students end up having serious difficulties connecting their transnationalized linguistic and cultural repertoires to their school experiences (see also Thapa [forthcoming](#), for a detailed ethnographic exploration of the experiences of students with a Nepali background).

Taken together, these two strands of work in progress exemplify some of the tensions and contradictions posed by contemporary processes of linguistic and cultural diversification. In a Hong Kong modern educational system built upon two linguistically differentiated paths inherited from the colonial times (English and Chinese), the current patterns of global mobility introduce complex configurations of language, culture, and identity that go beyond the traditional discrete boundaries. This is briefly expanded in the last section below, focusing on some persisting problems in mainstream research on bilingual education in Hong Kong.

Problems, Difficulties, and Future Directions

The historical developments mentioned in the previous sections point to an ongoing process of linguistic and culture hybridization that makes the ethno-national imagination of homogeneous linguistic communities hard to maintain, in line with what is being described elsewhere (see Blommaert 2013). Nevertheless, research and policy in the Hong Kong context still approaches the field of language education and bilingualism from a predominantly modernist perspective, that is to say, from an ideological stand that takes languages and cultures as bounded systems tied to specific communities and territories.

This is particularly reflected in the uncritical reproduction of the idea of the “native speaker” as well as in the understanding of bilingualism as a conflation of

two separate monolingualisms, regardless of the vast amount of sociolinguistic literature that has criticized these constructs over the last few decades (see, for instance, Rampton 1990; Heller 2007). Far from acknowledging the daily nature of widely documented meaning-making practices such as “crossing” (Rampton 1995) and “translingualism” (Canagarajah 2013), in which languages, repertoires, and styles are flexibly mobilized according to specific activities and goals in situated practice, much of existing research and educational policies in Hong Kong keep placing emphasis on the ideal separation of abstract (and pure) linguistic systems as a precondition to learning.

The Native English-speaking Teacher scheme (NET, hereafter) illustrates the persistence of the abovementioned ideological constructions. Launched by the Hong Kong Education Department to enhance the teaching of English language and increase exposure of students to English in Chinese-medium schools since the 1998–1999 school year, in response to the perceived declining standards in English among the students, this scheme aimed to attract overseas native speakers of English to work in Hong Kong schools, co-teaching with local teachers. In this way, NETs are often expected to perform in their schools as linguistic and cultural outsiders who only speak standard English with their students (Sung 2011), irrespective of whether they have Hong Kong local background due to transnational life trajectories (i.e., second generation Hong Kong nationals who migrated to the USA, UK, or Canada); in other words, they are prevented from having a more complicated or disorderly speech background which may also include Chinese.

This reinforces the artificial separation of Chinese and English in everyday meaning-making practices as well as, in most cases, the English-only rule in classrooms which may in turn prevent increased contact and language interactions between NETs and students. More importantly, the reproduction of such language ideologies prevents Hong Kong educators and administrators from drawing on international research and experiences in general on innovative bilingual education in which translingual and transliteracy classroom practices have proved to be pedagogically effective in multilingual contexts (see, for example, Schwarzer et al. 2011). However, there is still an important research gap in the Hong Kong context, and so future research directions should engage more actively in dialogue with the increasing attention to multilingualism in the fields of language education and applied linguistics worldwide.

Cross-References

- ▶ [Identity, Transnationalism, and Bilingual Education](#)
- ▶ [Sociopolitical Issues in Bilingual Education](#)
- ▶ [Translanguaging in Bilingual Education](#)

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Bilingual Education in the People's Republic of China

Xuesong Andy Gao and Weihong Wang

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Abstract

This chapter focuses on bilingual education programs in the People's Republic of China, including those for ethnic minorities and Chinese-English bilingual education programs. Bilingual education programs for ethnic minorities aim at developing minority students' literacy in national standard Chinese (the official language) and one ethnic minority language. Chinese-English bilingual education programs advocate using both national standard Chinese and English in teaching subject courses. This chapter outlines the developmental processes of these bilingual education programs and identifies challenges that may undermine

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their growth. By analyzing their origins, aims, and approaches, this chapter speculates about these bilingual education programs' future development in China.

Keywords

Bilingual education for ethnic minorities • Chinese-English bilingual education • Min-Han Jian Tong • Fuhexing Rencai

Introduction

The picture of bilingual education in the People's Republic of China (hereafter China) is complex since China has an overall population of 1.3 billion people, which consists of 56 ethnic groups, and also a highly heterogeneous linguistic context. The dominant *Han* (汉)-group comprises 91.5 % of the total population and speaks nearly 2,000 distinct dialects or subdialects (Li 2006). The other 55 ethnic minority groups, including Mongolian, Tibetan, Uyghur, and Zhuang, speak over 290 languages (Lewis 2009). This chapter focuses on bilingual education programs for ethnic minority students and Chinese-English bilingual education ones being promoted largely in China's mainstream schools and universities.

The first type of bilingual education programs were part of a government-led educational campaign at the establishment of the People's Republic of China in 1949 to provide education opportunities for ethnic minority groups (for a typology of bilingual education for Chinese minorities, see Dai and Cheng 2007). These programs aimed to develop ethnic minority students' bilingual competence in the national standard Chinese language (i.e., in its spoken form as *Putonghua* and in its written form as Standard Written Chinese) and their own ethnic languages. By doing so, it was hoped that these ethnic minority students could be integrated into the mainstream Chinese society and at the same time maintain their own cultural and linguistic integrity.

The rise of Chinese-English bilingual education happened after the implementation of the economic reform and open door policy in 1978. In the last few decades, the learning of English has been seen as crucial for China's economic development and global engagement (Gao 2012). As English is taught as a school subject in a context where real-life opportunities to use it are limited, there has been growing dissatisfaction with the effectiveness of the traditional English language teaching. To address the problem, a variety of initiatives have been undertaken, including English immersion programs and the use of English as medium of instruction (MOI). Since the national standard Chinese is the legally prescribed MOI, educational initiatives that use English as a MOI are called "bilingual education" to stress the fact that standard Chinese is also used so that they can gain tolerance from governments at various levels. In 2001, the Ministry of Education (MOE) issued an official directive which mandates 5–10 % of university courses should be offered in English (MOE 2001). Although this directive is only related to Chinese universities, it has been widely seen as a policy that supports Chinese-English bilingual education (Yu 2008). Subsequently, these initiatives to integrate the learning of English into the learning of particular academic subjects, referred to as bilingual education in China, have been

growing rapidly across China and “bilingual education has become part of the everyday vocabulary . . . of educationists . . . [and] ordinary people” (Feng 2005, p. 530).

Bilingual Education for Ethnic Minorities

Major Contributions and Work in Progress

The development of bilingual education programs for ethnic minority students has gone through different stages since 1949 (see Dai and Dong 2001 for a historical review). After the establishment of the People's Republic of China, the first constitution in 1952 accorded equality to all ethnic groups and explicitly stated that, “Every ethnic group has the freedom to use and develop its own language and script” (cited in Lam 2005, p. 125). In light of such policy discourses, the use of minority languages in education was protected and supported as a form of recognition of ethnic minorities' linguistic and cultural rights. A great number of linguistic investigations were undertaken to codify, standardize, and develop ethnic minority languages for education purposes from 1949 to 1957. Teaching materials were also compiled in, or translated into, these newly codified minority languages so that ethnic minority students could be educated in their own native languages. At this time, bilingual education programs for ethnic minority students largely focused on developing these students' competence in minority languages (Dai and Dong 2001).

During the tumultuous periods of the Great Leap Forward movement (1958–1959) and the Cultural Revolution (1966–1976), the national standard Chinese was imposed on minority education with the intention to replace minority languages in the bilingual programs so as to achieve quick “linguistic convergence” and “ethnic amalgamation” (Zhou 2012). Minority languages were suppressed and repudiated as “useless” and “backward” and the practices to educate in native ethnic minority languages were transformed to monolingual Chinese education (Dai and Dong 2001).

After the Cultural Revolution (from 1978 onwards), there was a revival of bilingual education for ethnic minority students. Noticing the reluctance in promoting ethnic languages during the first few years after the Cultural Revolution, Ma and Dai (1980) openly argued for the significance of ethnic minority languages and cultures in socialist development. They contended that bilingual education protected minority students' linguistic and cultural rights, which was conducive to China's maintaining of ethnic unity and social stability as a nation. The 1982 Constitution, thus, reaffirmed the lawful rights of minority groups to use and develop their own languages and cultures. The 1984 *Law on Regional Autonomy for Minority Nationalities* and the 1986 *Compulsory Education Law of the People's Republic of China* also explicitly stipulated the rights for minority students to receive education in their own native languages. With the endorsement of legislation, the development and trial use of ethnic written languages was restored in many minority autonomous regions and large-scale experiments in bilingual teaching were conducted in schools

for ethnic minority students. By 1985, 2.5 million students and 160,000 schools were engaged in bilingual education (Lin 1997). Translated minority language textbooks amounted to 1800 sets and 80 million volumes by 1991 (Lin 1997).

However, since *Putonghua* became widely accepted as “the common language for economic and cultural exchanges and everyday contacts among all peoples in China” (Dai and Dong 2001, p. 36), and further acknowledged by laws as the common speech for all ethnic groups in China, education for ethnic minority groups did not tilt exclusively to either minority languages or *Putonghua*. Instead, bilingual education programs emphasized the development of *Min-Han Jiantong* (民汉兼通) bilinguals – the learning of the national Chinese language and one minority language that was commonly used in ethnic minority regions or places to achieve fluency in both the national and ethnic languages (Dai and Dong 2001).

Transitional bilingual education practices were documented in empirical studies on the emergence of boarding schools for minority students (Chen 2008; Postiglione et al. 2007) and the merge of minority mother tongue schools with Chinese schools in the Xingjiang Uyghur Autonomous Region (Ma 2009; Tsung and Cruickshank 2009). For example, Postiglione et al. (2007) studied the practice of *neidiban* (内地班) schooling for secondary Tibetan students (sending Tibetan children to boarding schools in inland China to cultivate *Zang-Han Jiantong* bilinguals 藏汉兼通). Studies such as Wang (2011) and Tsung et al. (2012) examined the historical development of bilingual education in the ethnic and culturally diversified province of southwest Yunnan and reported on the impact of the rise of Chinese on bilingual education. The study noted that there were many supportive language policies and measures, such as the legitimation and promotion of bilingual literacy, the development of bilingual curriculum, the bolstering of native language status in secondary examinations, and the policy of rewarding bilingual teachers in the 1980s. These policies help legitimate ethnic native languages in bilingual education and subsequently bilingual education had been well developed.

Problems and Difficulties

In spite of all the policy discourses, recent research has noted that bilingual education programs for ethnic minority students underscore an effort to assimilate the minority groups into the mainstream Chinese society. While analyzing problems encountered by schools for ethnic minority students in implementing bilingual education programs, Lin (1997) found that inequalities in political and economic development of different ethnic groups had led to the de facto marginalization of minority languages in education even though minority languages were granted equal status with the Chinese language by law. She reasoned that, in practice, standard Chinese was often privileged as the official language commonly used in governments, education, and many other public domains and was also frequently associated with opportunities and social acceptance, whereas minority languages were limited in use and relegated to low social status. The lack of social rewards for using minority languages led to the depreciation of these languages by parents and local government officials.

Schools for ethnic minority students have been increasingly accommodated to *Putonghua* schooling. Even though bilingual education is offered in primary schools, it is often discontinued in secondary schools and universities. Postiglione et al.'s (2007) study on Tibetan studies in *neidiban* schooling found that in the program, the study of Chinese outweighed that of Tibetan. Tibetan study was regarded as a minor subject and students' performance in Tibetan learning was not valued in college admission selections. The overall outcome of *neidiban* schooling was a loss or deterioration in Tibetan language skills among the graduates. Nevertheless, Tibetan language skills were important for them to understand their native culture and work environment after their return to Tibet. As a result, they concluded that the *neidiban* program did not produce *Zang-Han Jiantong* bilinguals. Instead, it was subjugated to the political aim of creating a group of Tibetans who could facilitate the assimilation of Tibetans into the Chinese society.

Bilingual education programs for ethnic minority students have also been undermined with the rise of national standard Chinese as a symbol of unity for the nation and an inclusive national identity for all Chinese citizens. In the last two decades, the government has endorsed "an unbalanced bilingual ideology and a structured language order where minorities are supposed to use *Putonghua* as the primary language and their native language as the supplementary or transitional in public domains" (Zhou 2012, p. 27). As a result, the status of *Putonghua* has been tacitly elevated, whereas minority languages are relegated to simple symbols of ethnic, cultural, and linguistic diversity to be managed. The elevated status of *Putonghua* has been further bolstered by the implementation of market-oriented economy reforms. A market economy encourages dramatic internal migration which in turn creates a strong demand for a lingua franca to serve communication needs. *Putonghua* has developed from "a state-endorsed language to one that is endorsed by the state and empowered by the market" (ibid, p. 25).

Studies including Wang (2011) and Tsung et al. (2012) in Yunnan demonstrated that various stakeholders' displayed "great Han mentality" and the "pragmatism mentality." As a result, popular beliefs favoring *Putonghua* for children's academic success and future job prospects marginalized ethnic languages as only a transitional tool in the early few years of schooling to develop Chinese language literacy (also see Tsung 2014). These studies suggest that China is heading in the direction of emphasizing assimilation over harmonious diversity through minority education. The studies also reveal an ongoing dilemma that the Chinese government faces in appropriating ethnic diversity and national unity in its nation-building process. China is now at a turning point that would lead to either interethnic conflict or harmony. Studies have revealed that it is heading in the direction of emphasizing assimilation over any acceptance of harmonious diversity (Postiglione 2014). Postiglione (2014) argued that the increasing interethnic contacts that have been the result of economic reforms, market forces, population flows, and the opening to the outside world have brought fundamental changes to the nature of ethnic pluralism in China. The changing nature of ethnic pluralism has placed ethnic intergroup relations at a crossroad. The country may move toward "plural monoculturalism" in which "ethnic minority groups emphasize their cultural identities above those of the

nation and limit their potential to take on multiple roles in national development,” or toward “harmonious multiculturalism” that would “align with the Confucian tradition of ‘harmonious yet different’ and coincide with the state’s campaign for a harmonious society” (Postiglione 2014, p. 43). It has become critical for the Chinese government to maintain an optimal balance of its efforts to “foster cultural pluralism and national stability through a shared sense of national belonging” (Leibold and Chen 2014, p. 16).

Postiglione (2014) foregrounded the state education system as a key battlefield to push Chinese society towards a harmonious multiculturalism, whereas bilingual education as a critical device to promote cultural pluralism and ethnic tolerance. He suggests that bilingual education programs should include not only the minorities but also the mainstream Han community so that “positive values of pluralism and integration should be simultaneously transmitted at the level of a common human culture, the mainstream national culture and throughout multiple minority cultures” (cited in Leibold and Chen 2014, p. 12). However, some preliminary attempts to include the Han majority in multicultural education are reported to focus on “static cultural artefacts without touching upon the deeper levels of understandings on ethnicity and the majority-minority relations and therefore cannot create a truly multicultural learning environment” (Zhang and Chen 2014, p. 400). It is unclear how the Chinese government will take up the new challenge in promoting such bilingual education.

Chinese-English Bilingual Education

Major Contributions and Work in Progress

Chinese-English bilingual education programs in mainstream schools and universities use both English and Chinese as MOI to teach subject or content courses. It is a recent phenomenon rising from the *Han* majority group’s aspiration to “produce bilinguals with a strong competence in mother tongue Chinese and a foreign language, primarily English” (Feng 2005, p. 529). Chinese-English bilingual education was initiated by a few well-equipped elite schools in the 1990s in response to the mounting criticisms for the costly but ineffective English language programs in the 1980s. Some of those early provisions of Chinese-English education include two secondary-level bilingual science programs developed in Guangzhou and Shanghai in 1993 and 1992, respectively, one primary-level program developed in Beijing, and one China-Canada-United States English Immersion Programme (CCUEI) developed collaboratively by university-based American, Canadian, and Chinese language educators for selected kindergarten and primary school students in Xi’an in 1997. As pointed out by Hu (2007), virtually all schools involved in these programs were well-resourced prestigious schools with “competent teaching staff,” “high-caliber students,” and “long-established connections with domestic tertiary institutions or overseas educational institutions” (p. 98). Those programs were largely supported by overseas partners or staffed by native English speakers. These

programs were reported to be successful and their successful stories have contributed to a rise of interest in Chinese-English bilingual education.

The rising interest had been further fueled with the involvement of local governments in a few large urban centers, in particular the municipality of Shanghai (Hu 2007). Inspired by the positive reports of the few elite bilingual education programs, the Shanghai Education Commission started to encourage experimentation with bilingual instruction in the late 1990s. Initially, there were only eight schools participating in the experiment in 2000. The directive of the MOE (2001) enhanced the determination of the Education Commission to promote bilingual education and expanded bilingual experiments to involve 100 schools in 2001, around 30,000 students in 2002, 45,000 students in 260 schools in 2003, and 55,000 students in 2004 (Hu 2007). Other coastal cities immediately followed suit. As Song and Yan (2004) reported, provincial education departments in Guangdong, Liaoning, and Shandong soon proposed their own "100 bilingual education schools" projects after Shanghai's implementation of bilingual education. Many programs were evaluated positively. For example, Wang (2003) reviewed five successful bilingual programs carried out in Qingdao, Shanghai, and Guangzhou. In one program, he reported that the group of Primary 6 students receiving bilingual instruction not only outperformed their counterparts in English, Chinese, mathematics, natural science, and computer science but also outperformed two key Junior Secondary 3 classes of students in English speaking, listening, and writing. The successful bilingual education experiments in these big cities brought an upsurge of bilingual programs across China. Many schools have jumped on the "bilingual education" bandwagon and practiced varied forms of English-content integrated teaching under the name of bilingual education, such as content-based language teaching, English immersion, and English medium instruction (Hu 2007). The actual use of the two languages in classroom instruction varies. Some use English as the exclusive MOI. This is the case of the *CCUEI programme* in Xi'an (Qiang and Siegel 2012). Most bilingual programs adopt a flexible combination of Chinese and English in teaching and learning. Bilingual education research centers have been set up in places like Shanghai, Liaoning, and Beijing. Bilingual education conferences have been held regularly. For instance, National Conference on Bilingual Teaching is held every 3 years. Online bilingual education platforms such as China Bilingual Education Network (<http://www.tesol.cn/>) have also been built up to promote this way of English teaching on a large scale.

Like bilingual education programs in primary and secondary schools, bilingual education in higher education also originated in elite universities. To build a world-class university, Tsinghua University recognized the importance of English and introduced English medium instruction in the 1990s to provide an English learning environment for its students (Pan 2006). Such practices had greatly facilitated the development of Tsinghua's joint international MBA programs, which were evaluated as "having the most highly qualified faculty, the finest curriculum and the best educational outcomes in China" (Pan 2006, p. 257). Encouraged by Tsinghua's success in MBA education, the state accepted English medium instruction for university academic programs and recommended it to other universities nationwide

in the ministerial directive of 2001 (MOE 2001). The directive rationalized Chinese-English bilingual education as a critical means to: (1) meet the needs of globalization and economic growth, (2) cultivate international talents (*Guojixing Rencai* 国际型人才) or English-knowing professionals (*Zhuanye Waiyu Fuhexing Rencai* 专业外语复合型人才) for the twenty-first century, and (3) improve the quality of English education and the overall quality of higher education. With government support, other major universities also increased the provision of bilingual education. Bilingual education had, thus, gained great momentum and expanded rapidly in most Chinese universities in the last decade. A recent survey across China found that 132 out of the 135 universities investigated offered bilingual courses and/or programs, with an average of 44 courses per university (Wu et al. 2010).

Problems and Difficulties

Although English-Chinese bilingual education has been promoted at all educational levels, it is beset with a number of controversies, which may undermine its developmental course. The prospect of these Chinese-English bilingual education programs is uncertain in China because there have not been satisfactorily definitive answers to questions related to their legal status, social consequences, and pedagogical effectiveness.

Despite support from the Chinese MOI, Chinese-English bilingual education programs do not enjoy legal protection. The Language Law of People's Republic of China unequivocally stipulates that "schools and other institutions must use *Putonghua* and standardized Chinese characters as the basic spoken and written language in education and teaching" (cited in He 2011, p. 98). The flourishing Chinese-English bilingual education programs are indicative of an educational decentralization process that has been happening in China. They also reflect a pragmatic attitude that the Chinese government adopts towards English and speak for the efforts that the government is willing to undertake in appropriating the language for its global engagement and economic development. However, it must be noted that the national language policy has effectively "ruled out the possibility of using English as the medium of instruction in schools as advocated by bilingual education" and "bilingual education was not given any endorsement in the new secondary curriculum" (He 2011, p. 99). This means that the government has the flexibility of terminating Chinese-English bilingual education programs at any time with full legal support.

The fact that Chinese-English bilingual education programs are still growing rapidly in China suggest that the Chinese government is in a dilemma similar to that of bilingual education programs for ethnic minorities. On the one hand, economic growth emboldens China to be more assertive in its global participation. The Chinese government aspires for exporting (*zou chu qu* 走出去) its cultural products, other than manufactured commodities, to overthrow the ideological and discursive dominance of the west. The government is also keen in helping Chinese universities internationalize themselves and recruit international students to counterbalance the

increasing number of Chinese students pursuing academic studies abroad. To achieve these goals, the government needs English, the *de facto* international language, to have their voices heard and respected as well as attract international students to China. On the other hand, overreliance on English may undermine China's cultural identity, national security, and political stability. Meanwhile, the rising importance of China demands the nation to promote the Chinese language to be the next international language. The Chinese language and its culture are also needed to unify the nation and its people (Zhou 2012). The government recently initiated discussion on removing English from the national university matriculation exams or reducing the weighting of it while increasing the weighting of Chinese (Pan 2015). Though this does not necessarily mean that English is no longer seen as an important language, it is suggestive of the Chinese government's design to confirm the unchallengeable status of the national standard Chinese for its rise to be a new international language. Together with the reduction of teaching hours for the subject of English in secondary curricula, these new initiatives can also be considered significant policy signals, which portend a likely departure from the policies on English provision that have been implemented since the late 1970. They will profoundly influence the developmental course of Chinese-English bilingual education programs.

In addition to the political and legal considerations, Chinese-English bilingual education programs also have significant social consequences, about which researchers have heated debates. Bilingual education programs have been associated with an elitist origin since almost all of them were launched by well-resourced urban schools in economically developed areas. The development of such bilingual education programs may cause social divisions along the line of those "who have" and "who have not" (Nunan 2003, p. 605). It may help "perpetuate and accentuate educational inequalities in China by making [bilingual instruction] a service to the privileged, the rich, and the elite" (Hu and Lei 2014, p. 564). Families with more social and economic resources will invest heavily in helping their children access bilingual education programs to acquire better English proficiency and achieve upward social mobility. Children from families with limited social and economic resources are left behind in the race for opportunities to pursue upward social mobility, as English competence becomes "a defining characteristic of talents in the 21st century" (Hu 2009, p. 52). The craze for Chinese-English bilingual education also drives schools and educational authorities to divert limited resources to acquire the infrastructure and English-competent teachers for the delivery of bilingual education programs. Unless a school is well financed, such resource diversion is likely to undermine the teaching and learning of other subjects. The massive spending on Chinese-English bilingual education programs demands justification in terms of their pedagogical effectiveness. There is a general lack of empirical research on Chinese-English bilingual education and much of the extant research lacks rigor. For instance, evaluation research has been conducted to examine the effectiveness of Chinese-English bilingual education programs in China. While these studies show that bilingual education apparently had a positive impact on students' learning of English and other subjects, Hu (2007) argued that these studies

had been built on erroneous assumptions about language learning and cognitive development. Those who advocate for bilingual education believe that bilingual education programs would maximize students' exposure to English, which leads to a better command of the language than those who do not access bilingual education programs. However, the maximum exposure assumption is untenable as it is not the quantity of exposure but the quality of students' engagement with English that matters. The effectiveness of bilingual education programs was also undermined by various contextual factors such as lack of trained teachers, inappropriate learning materials, and students being unready for learning academic subjects in a medium other than their first language (Cheng 2012; He 2011). Though recent studies reveal that bilingual education programs have positive effects on students' language learning and no negative impact on subject content learning (Cheng 2012; Cheng et al. 2010), such findings can hardly justify the enormous financial investments into these bilingual education programs. As acknowledged by Cheng et al. (2010), other contextual factors such as social and economic ones might have influenced the evaluation results. It has become imperative for rigorous empirical studies to be conducted on these bilingual education programs in China so that they can provide a solid knowledge base for policymaking. Furthermore, future research may benefit from drawing theoretical input from recent research in multilingualism (García and Li Wei 2014; Lin 2015; Creese and Blackledge 2015). For instance, García and Li Wei (2014) proposed to reevaluate codeswitching in bilingual education through the lens of translanguaging.

Future Directions

This chapter has outlined two major types of bilingual education in China. Bilingual education programs for ethnic minority students are to develop *Min-Han Jiantong* – bilinguals who have linguistic competence in both their native languages and the national language of Chinese, whereas the Chinese-English bilingual education is to educate *Fuhexing Rencai*, people who possess “both knowledge in specialized areas and strong competence in a foreign language” (Feng 2007, p. 2). These two types of bilingual education seem to be separate and exist in parallel in China, but are, in fact, interconnected and mutually influential (Feng 2005, 2007).

Through appropriating two languages in bilingual education programs, minority students are expected to align with their own ethnic cultures and identities and, more importantly, the national culture and identity. Chinese-English bilingual education creates an effective way for participants to learn a foreign language while “has little to do with cultural identity, but only concerns about language” (Wang 2003, p. 12). In both types of bilingual education, students' right to be educated in their mother tongue is protected by law, but at the same time, the right is blurred. In bilingual education programs for ethnic minorities, official documents state that minority students should master their ethnic minority language first before developing competence in *Putonghua*. With *Putonghua* being promoted as a common language for the nation, these programs contribute to a linguistic hierarchy, in which *Putonghua*

enjoys a higher status than ethnic languages. In contrast, *Putonghua* is the legitimate language for instruction in Chinese-English bilingual education as protected by the relevant law. In practice, Chinese-English bilingual education has resulted in another linguistic hierarchy in which English has a much higher status than *Putonghua*. The contradictory appropriations of *Putonghua* in the two types of bilingual education reveal tensions between “globalization and the political agendas of the nation state, and between various ideological and cultural forces” in China (Feng 2007, p. 8). It seems that the future of bilingual education in China depends on how the interactions of various social, cultural, and political forces will affect the dynamic relationship of the languages – the national standard Chinese, the many languages of ethnic minorities, and English. Its ultimate development may hang critically on how China will define itself along the linguistic line, as it might be a rather challenging project for the Chinese government to “foster cultural pluralism and national stability through a shared sense of national belonging” (Leibold and Chen 2014, p.16).

It is noteworthy that the Chinese government has always regarded linguistic diversity as a threat to political unity, and for this reason Emperor Qin Shi Huang (the first emperor, BC 221) standardized the written language to create a linguistic basis for a unified Chinese empire (Chen 1999). Successive Chinese dynasties and governments have attempted to maintain a shared linguistic medium for communication (Li and Zhu 2010). Therefore, the future of China's bilingual education programs depends on whether the Chinese government feels confident enough in managing these challenging tasks.

Cross-References

► [Translanguaging in Bilingual Education](#)

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- A. M.Y. Lin: [Code-Switching in the Classroom: Research Paradigms and Approaches](#). In Volume: Research Methods in Language and Education
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Bilingual Education in India and Pakistan

Ahmar Mahboob and Rashi Jain

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Abstract

This paper reviews current research on bilingual education in Pakistan and India. It shows that while the context of the two countries is different, literature on the topic report similar issues and have similar constraints: the literature typically discusses policy issues and attitudes towards code-switching, and there is a dearth of classroom-based research on this topic. The paper reviews the key current

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debates in the two countries and identifies issues that need to be considered as research on the topic evolves.

Keywords

Bilingual education • India • Pakistan • code-switching • language-in-education policy

Introduction

Pakistan and India share their educational histories prior to 1947, when they gained independence from the British. Before the British colonized South Asia, education in the Indian subcontinent was multilingual, with children (in some, but not all regions) beginning their education in the local/regional language and gradually shifting to higher levels of scholarship in a classical language (e.g., Sanskrit or Persian) which in turn became the medium of instruction (Krishnamurti 1990; Mohanty 2006). These practices were embedded within rich plurilingual traditions that helped maintain regional languages as a rich and integrated whole, despite certain languages being more dominant than others from one region to another within South Asia (Canagarajah and Ashraf 2013; Khubchandani 1997).

The British colonial administration, however, adopted a two language policy: English was taught and used as a medium of instruction in some elite schools, while Hindi–Urdu or other regional languages were used as medium of instruction in other schools (Coleman and Capstick 2012; Krishnamurti 1990). English was also taught as a subject from the V or VI standard, while modern Indian languages or classical languages were taught as separate subjects in secondary and postsecondary settings (Krishnamurti 1990). The British rule thus brought into practice a distinction between language as a medium of instruction and language as a school subject in colonized India. When the subcontinent gained independence from its colonizers, and India and Pakistan were created as two separate nations, English was formalized as an official language alongside Urdu in Pakistan and Hindi in India.

Both India and Pakistan proceeded to adopt versions of a tripartite language formula, in which a dominant/national language,¹ along with a regional language and English would be taught as language subjects in primary and secondary schools (Canagarajah and Ashraf 2013), while the actual medium of instruction would vary. It needs to be noted, however, that the use of tripartite language policy varies across regions in Pakistan. For example, while Sindhi and Pushto have been used in some schools in Sindh and KP, other provincial languages such as Balochi and Punjabi are not (Rahman 2002). The tripartite policy has had a continuing impact on the use of languages in schools in both countries: elite and a majority of urban private schools continue to use English as a medium of education, while government and rural

¹Urdu is the designated national language of Pakistan. The Indian Constitution does not mandate any one language as a “national language” (Annamalai 2001).

schools tend to use other national or regional languages as medium of instruction. This language-in-education practice perpetuates a belief that English is the language of power, while other languages serve everyday local purposes.

While we are aware of and recognize the influence of past policies and practices, this entry on *Bilingual Education in India and Pakistan* focuses on the current policies and practices in the two countries. We would also like to emphasize, as others scholars have in the past (e.g., Vaish 2008), that despite the long colonial rule and due to the unique plurilinguistic landscape of South Asia, the systems of “bilingual” education currently in India and Pakistan cannot be made to fit neatly under international/Western models. The language-in-education systems in both countries are therefore best understood contextually.

Early Developments

Pakistan

Since gaining its independence in 1947, Pakistan has followed a three-language approach: Urdu as the national language, English as the official language, and one language recognized for each province. This policy has also been adopted in education, where schools are either English medium, Urdu medium, or use the provincial language as a medium of instruction.

Pakistan does not have a documented language policy or a language-in-education policy. This is not to say that there is no policy on language in Pakistan – there is and this will be discussed in this entry. What we mean here is that there is no official document that specifically outlines and discusses the national language policy and its implications for education, etc. (as there are for other countries, such as the 2013 South African “National Language Policy Framework”).

Urdu, while being the national language, is spoken by less than 8 % of the population of Pakistan as a mother tongue; the rest of the population speaks one of the other 72 languages of Pakistan (Lewis et al. 2014) as their mother tongue. This implies that the majority of students in schools are at least bilingual, if not multilingual. However, in spite of this large number of non-Urdu mother tongue speakers, there are no clear guidelines on how to use, teach, or manage local languages in schools. Research on the use of languages in schools reports that a large number of teachers do use local languages in their classrooms (Coleman and Capstick 2012; Gulzar 2010b; Gulzar and Qadir 2010; Tariq et al. 2013); however, there are no descriptions of how this is done. There are also no official guidelines or training material for teachers on how to use local languages in their classrooms. Habib (2013) notes that a “lack of a clear language policy has probably had a detrimental effect on learning” (p. 39). The National Education Policy (NEP), 2009 (the current education policy), promises that “a comprehensive school language policy shall be developed in consultation with provincial and area governments and other stakeholders” (Pakistan 2009, p. 28); however, to date, no such policy has been developed.

In the absence of an articulate policy and appropriate research and training material, we are unsure of the expected or actual classroom practices.

India

In response to the country's unique multilingual realities, the Constitution of India designated Hindi as the official language of the country, alongside English as a coofficial language, while each Indian state has been permitted to specify its own official language. In all, the Constitution recognizes 22 "official" languages (including Hindi), along with a number of other tribal and nontribal languages spoken in the country. The Constitution further guarantees linguistic rights to all Indian citizens and mandates that religious and linguistic minorities be educated in their mother tongue (Meganathan 2011). However, the Constitution envisages the responsibility to promote literacy in minority languages with the language communities by establishing their own institutions that would provide minority language instruction, albeit with state aid (Annamalai 2001).

Starting in 1956, and with extensive revisions in the 1960s, India developed a three-language formula (TLF) as an education strategy in schools pertaining to both number of languages taught as subjects as well as the language used as the medium of instruction. The three-language formula is partly a result of the colonial legacy and partly a result of successive Indian governments' efforts to respond to the realities of a complex and dynamic multilingual landscape (MacKenzie 2009; Sridhar 1991). An indirect goal of the TLF is also to facilitate intranational communication between people at the national, regional, and local levels (Meganathan 2011). This mixed history has also led scholars to take differing positions with regard to the impact of English on other languages. According to Vaish (2008), for instance, the three-language formula serves as a policy of decolonization by making English language instruction available to the masses, as opposed to the middle and upper classes during colonial rule. Other scholars take the stance that the three-language formula is leading to the creation of English-knowing bilinguals who are increasingly demanding more and earlier English language instruction at the expense of other languages, including Hindi (e.g., Annamalai 2007; Dua 1996).

Major Contributions

Pakistan

Research on bilingual education in Pakistan mostly focuses on: (a) the politics of using English versus Urdu or other local languages as medium of instruction and (b) the attitudes, beliefs, and benefits of code-switching in classrooms. There is a dearth of classroom-based research on bilingual education (Jabeen 2010). Below, we will first review the policy issues and then discuss other research on bilingual education in Pakistan.

There is considerable debate in Pakistan on the politics of language and the socioeconomic and educational impact of not recognizing local languages in education. Researchers working in this area (Bari 2013; Mahboob 2002; Mahboob and Talaat 2008; Mustafa 2011; Rahman 2004, 2010b) argue that maintaining English as the language of education in the elite schools, while using Urdu (or the provincial language) in the majority of government schools disadvantages students from lower socioeconomic status (SES) and perpetuates current socioeconomic class differences. They point out that students from higher SES backgrounds have access to better English language education, which leads to better jobs and resources, whereas students from lower SES backgrounds do not have access to good English language education and are excluded from these opportunities. These scholars stress the need to provide support to and through local languages. This issue is recognized by the Government of Pakistan as well and is addressed in section 3.5, Overcoming Structural Divides, of the National Education Policy (NEP); however, instead of providing support to and through local languages, NEP further promotes and reinforces the position of English.

The underlying assumption in NEP is that structural divides can be overcome by giving all students access to English. Policy action 3, section 3.5, of the NEP states:

Ministry of Education in consultation with Provincial and Area education departments, relevant professional bodies and the wider public, *shall develop a comprehensive plan of action for implementing the English language policy in the shortest possible time, paying particular attention to disadvantaged groups and lagging behind regions* [emphasis added]. (Pakistan 2009, p. 28)

In addition, policy action 4–8 state:

4. The curriculum from Class I onward shall include English (as a subject), Urdu, one regional language, mathematics along with an integrated subject.
5. The Provincial and Area Education Departments shall have the choice to select the medium of instruction up to Class V.
6. English shall be employed as the medium of instruction for sciences and mathematics from class IV onwards.
7. For 5 years Provinces shall have the option to teach mathematics and science in English or Urdu/official regional language, but after 5 years the teaching of these subjects shall be in English only.
8. Opportunities shall be provided to children from low socioeconomic strata to learn English language. (Pakistan 2009, p. 28)

The policy promotes the adoption of English, first as a subject, then as a medium of instruction for mathematics and science. It also states that English will be the mandatory language for teaching science and mathematics across all grade levels after 2014. The policy gives some recognition to “official regional languages,” but none to nonofficial regional languages. These policy decisions are based on parents’ demands (Habib 2013) and the assumption that students need to learn English and learn about science and mathematics through English because English is the language of knowledge-production in these fields. However, initial reports from the

field are quite negative. Bari (2013), writing in the *Daily Dawn*, notes that teachers are used to teaching in Urdu or a local language and are unable to teach their subjects in English, “let alone helping students learn English.”

Academics (Bhatt and Mahboob 2008; Mahboob 2002, 2007; Rahman 1996, 2004, 2010a, b) and activists (Mustafa 2011) have also criticized these policies and argue that such policies further disadvantage students from nonelite backgrounds because they do not have appropriate English language skills (or, for that matter Urdu language skills) to study mathematics and science through the medium of English. They argue that a carefully formulated language-in-education policy needs to be developed, which is based on research instead of emotional debate.

According to the Ministry of Education (Pakistan 2009, p. 71), 68.3 % of government schools use Urdu as a medium of instruction; 15.5 % educational institutions in Sindh use Sindhi as medium of instruction in; 9.5 % use other languages (Pushto, Balochi, Arabic, etc.); and 10.4 % use English as the medium of instruction. While we don’t have detailed statistics about private schools (both elite and nonelite), most of them tend to use English as the medium of instruction. Students and teachers in these schools come from diverse language backgrounds and have limited English language proficiency (Mahboob and Talaat 2008). To compensate for the limited language proficiency, teachers often code-switch between English, Urdu, and other local languages (Gulzar 2010a, b; Gulzar and Qadir 2010; Mustafa 2011; Raja 2014; Tariq et al. 2013).

The majority of published research on bilingual education in Pakistan looks at code-switching. However, none of this research is based on an analysis of actual classroom language; neither does this research engage with the current perspectives on translanguaging (Canagarajah and Ashraf 2013; García and Li Wei 2014). Instead, this research either argues that: (a) bilingual education should be adopted in Pakistan (Raja 2014), (b) advocates that research on bilingualism needs to be carried out (Jabeen 2010), or (c) researches stakeholders’ attitudes and perception towards code-switching (Gulzar 2010a, b; Gulzar and Qadir 2010; Tariq et al. 2013).

Raja (2014) argues, based on a review of literature, that developing and implementing bilingual education policies will be useful for Pakistan. However, this paper does not include a discussion of the current practices in schools in Pakistan, where teachers do use multiple languages in the classroom, nor does it provide any clear suggestions on how lessons from other countries can benefit teachers in Pakistan.

Jabeen (2010), based on a survey of 50 teachers and 50 students, finds that there is a negative attitude towards bilingualism. She states,

The low status given to Urdu/native language and associated negative phenomena like poverty and powerlessness because knowledge and use of English language promise socio-economic success in our society, and the ESL/EFL teaching approaches and methods focusing monolingual technique are the causes of absence or lack of initiative for launching inquiry in the field of bilingualism. (p. 76)

Jabeen’s findings corroborate the arguments raised by others researchers (Mahboob 2002; Mustafa 2011; Rahman 1996, 2010b) that the privileging of English in elite schools and higher education results in a negative attitude towards

Urdu and other local languages. Jabeen further argues that negative attitudes towards bilingualism in classroom and in society discourage researchers and students from carrying out research on this topic.

Gulzar and Qadir (2010), Gulzar (2010a, b), and Tariq et al. (2013) state that code-switching is a common phenomenon in Pakistan and report on surveys of students' and teachers' beliefs about and attitudes towards code-switching. Gulzar and Qadir (2010), based on interviews of ten interviews of teachers and experts in English language teaching, point out that their participants were split on the effectiveness of code-switching. While some experts believed that code-switching can be useful for students, they warned that it should be restricted to classes with students of low language ability. They stated that teachers should not use code-switching for convenience, but should use local languages to achieve specific purposes. Gulzar and Qadir conclude "the majority of the respondents also recommended simple and effective use of English as a strategy to avoid CS [code switching] in the EFL classroom" (p. 422).

Gulzar (2010b), based on a survey of 406 language teachers, explores teachers' reactions towards 11 functions of code-switching. These functions include: clarification, giving instructions effectively, translation, socializing, linguistic competence, topic shift, ease of expression, emphasis, checking understanding, repetition, and creating a sense of belonging. Results of Gulzar's study "highlight that the teachers don't know about the limits of the use of CS and for which functions they can/should code-switch to cater for the needs of the students" (p. 38). Tariq et al. (2013) partially replicated Gulzar's study and included 10 functions of code-switching. They found their participants to support code-switching and noted that teachers used "code-switching to accommodate their own and students' needs" (p. 33). However, this study does not provide many details about the methodology used nor does it discuss the findings in any depth.

India

Most theoretical literature and empirical research on language education in India has tended to focus on its unique multilingualism in its K-12 settings (e.g., Annamalai 2001; Panda and Mohanty 2009; Pattanayak 2007; Sridhar 1991). The three-language formula guides primary and secondary education, while there is no formal policy designating language use at the university level although English is prevalent as a medium of instruction in postsecondary institutions. This is partly because English has historically been valued as a "neutral" language in many postindependence Indian states where Hindi is not the dominant local language and partly because English is perceived as an international language that acts as a vehicle to more opportunities and greater prosperity (Jhigran 2009; Sridhar 1991).

Scholars have also examined bilingualism that occurs through socialization in nonformal and nonacademic settings. Sridhar (1991), however, has attempted to create a portrait of bilingual education in the Indian context by identifying two widespread models of bilingual education in the country: *sequential* bilingual instruction where up to a certain grade level, the students' mother tongue or the regional language functions as the medium-of-instruction, and is then replaced by another language, such as

English, for the remaining grades, and *concurrent* bilingual instruction which “involves the study of some subjects through one language and others through a second language all through the curriculum” (p. 96). Sridhar (1991) further describes a third model, not strictly bilingual, where students from linguistic minority communities receive instruction in the dominant regional language or English. These students may, however, study their mother tongue as a subject.

Survey research in the past, however, has shown that the number of languages actually taught in schools as either subjects or as a chosen medium of instruction is disproportionately smaller than the actual number of mother tongues spoken across the country (Chaturvedi and Singh 1981). Many Indian tribes, especially, are not able to enjoy the benefit of having the tribal language taught as a school subject. Several scholars (e.g., MacKenzie 2009; Mohanty 2007; Panda and Mohanty 2009; Pattanayak 2007; Sarangapani 2003; Sridhar 1991) have paid special attention to tribal bilingualism in India. By and large, scholars agree that schools fail to impact tribal populations, as formal education through schooling is not yet culturally integrated within the Indian tribal societies. However, in cases where schooling leads to bilingualism, it has been noted that it happens to the detriment of the tribe’s language, which tends to get replaced by the majority language of the region (Annamalai 2007). Sometimes this happens because some tribal languages have a rich oral literary tradition but no written script and therefore are not taught in schools that are traditionally oriented towards teaching written languages. Even in cases where a tribal language can be written using the script of the majority language of the region, the tribal language is still problematically seen as having little educational use in schools (Mohanty 2007; Sridhar 1991).

To address these imbalances, some experimental attempts (later discontinued) were made in the 1980s to provide “bilingual transfer” programs at the early education level to facilitate a smoother transition from a tribal mother tongue to the dominant language (see Mohanty 1990). More recently, in the early 2000s, new experimental programs have been started and are showing promising outcomes in two Indian states with high tribal populations – Andhra Pradesh and Odisha. Under these programs, the tribal/home languages are being used in the early grades and then gradually replaced with the majority state languages as students transition from elementary to secondary education (see Panda and Mohanty 2015).

Problems and Difficulties

Pakistan

As pointed out earlier, Pakistan does not have explicitly stated language or language-in-education policies. One reason for this is the contested nature of language-based politics in the country. To understand this problem, we need to briefly revisit the history of language policy in Pakistan (see Rahman 1996 for a detailed discussion of key issues and history). At the time of independence, Pakistan needed to develop a language policy. This task was, however, not easy because a number of language

groups were competing to gain recognition. Among these, the two dominant languages were Urdu and Bengali. Urdu was used as a symbol of Muslim unity during the Pakistan movement. Bengali was the majority language of East Pakistan or Bengal (now Bangladesh). According to the 1951 census, Bengalis made up 54.6 % of the total population of Pakistan and was thus the majority language (numerically). The Pakistani leaders believed that there could be only one national language, Urdu, and that more than one national language could not hold the nation together. Jinnah (the first Governor General of Pakistan) stated that while Bengali could be recognized as a provincial language, it was not to be recognized as a national language. Furthermore, he stated that those who wanted Bengali to be recognized as a national language were antistate elements. This policy towards Bengali was considered a sign of suppression of the Bengali culture and was used as a symbol during the Bengali nationalist movement that eventually led to the separation of East Pakistan to form Bangladesh in 1971. The separation of Bangladesh did not simplify the language issues in Pakistan (formerly West Pakistan). Urdu is used by a minority of the population as a mother tongue in Pakistan and the other ethnolinguistic communities continue to demand recognition of their languages. Given this scenario, developing a language or language-in-education policy is a highly political and contentious issue – one that the governments avoid. As a consequence, Pakistan remains without an explicit language policy.

A lack of an explicitly defined language-in-education policy implies that schools and teachers do not have guidelines on how to use or support multiple community languages in their classrooms. Teachers do code-switch, but they are not trained to do so appropriately for educational purposes. A lack of explicit policy also makes it difficult for teacher educators to train teachers in appropriate methods to teach in multilingual contexts.

In addition to a lack of policy, a dearth of credible classroom-based research is also a major challenge in understanding and encouraging appropriate bi-/multilingual teaching practices in Pakistan. While there is a growing amount of PhD and other research being carried out on language and educational issues in Pakistan, a majority of it is survey based. These survey-based projects have limited, if any, use in helping us understand actual classroom practices. This situation needs to be remedied by developing more qualitatively oriented and descriptive studies of language use in the school.

India

Although the language-in-education policies in India are aimed towards giving learners formal access to more than one Indian language in school settings, the policies have also led to some tensions, inconsistencies, and contradictions. One tension is the creation of a hierarchy among the school languages that go against the tenets of truly balanced bilingualism (Sridhar 1991) and multilingualism (Annamalai 2001; Canagarajah and Ashraf 2013; Mohanty 2006). English, for instance, is perceived on one hand as a language that helps break down caste, socioeconomic,

and linguistic barriers and is being increasingly offered as a second language subject as well as the medium of instruction in private schools that serve the more affluent classes. This, in turn, is also seen as key to elite formation (Phillipson 2009). Further, in the Hindi-dominant northern states, Sanskrit is taught as a “third” language, instead of another regional language, such as a South Indian language. Similarly, in some South Indian states, Hindi is not offered as a language subject at all (Jhigran 2009). These language-in-education policies collectively perpetuate a double divide – between the elitist language(s) of power and state majority languages and between state majority languages and the dominated, indigenous, and minority ones, such as tribal languages (see Mohanty 2010).

Some academic scholars have conducted intensive ethnographic research in different settings in order to understand and analyze the school experience in its many complexities (e.g., Ramanathan 2005; Sarangapani 2003; Thapan 1991; Vaish 2008). Although some of these ethnographies do look at language education, bilingual education is not the primary focus. Some scholars, for instance, have examined the impact of English in the curriculum and the classroom, as well as probed schools as sites of resistance and negotiation between dominant and dominated language speakers (e.g., Mohanty et al. 2010). This body of work has grown in response to the increasing prominence of English as a global force along with the inconsistent quality of English language instruction in public and private schools, a trend that has also led to a burgeoning private English language education industry in India (Advani 2009; Canagarajah and Ashraf 2013; Vaish 2008). These scholars have examined such practices as code-switching/mixing/borrowing and hybridized instruction that draw upon more than one language in that context. Vaish (2008), for instance, describes biliterate and bilingual practices she documented being used in an elementary classroom in a “government” school in the nation’s capital, where the classroom discussions reflect the street bilingualism one encounters everyday in Delhi, and as a result the code-switching practices in the classroom go unmarked. Hindi, in her study, was used by teachers not to foster balanced acquisition in both languages simultaneously, but as a tool in the classroom to help students decode the target language – English.

Future Directions

Pakistan

All the studies on bilingualism and code-switching reviewed here use survey and/or interview data. None of them actually provide an analysis of classroom language use. This absence of descriptive studies that analyze actual language use is one gap in research on bilingual education in Pakistan: a gap that needs to be addressed to develop a better understanding of bilingual educational practices in the country.

Another gap in research that needs to be addressed is a study of language use in the content subject classes. The current research on bilingualism in Pakistan – limited as it is – primarily focuses on either the medium of instruction debate or

on English language teaching/learning. We need research that collects and analyzes the use of language in the content classrooms to better understand language practices in these classes (see Lin 2012, for a more detailed discussion of the issues listed here).

In addition to these gaps, another direction that researchers and teachers need to consider is action-based research (Burns 2010). Action research gives practitioners a structured approach to try out new practices and to document them for sharing and dissemination. In the absence of academic research on appropriate models of bilingual education in Pakistan, such an approach can help teachers and researchers.

Finally, it is essential that the government develop a well-researched and informed language in education policy. This policy needs to respond to the current debates and research on the topic (including an engagement with the concept of translanguaging) and relate to the principles of language policy and practice (Mahboob and Tilakaratna 2012). Such a policy will give a clearer direction to teachers and schools.

India

Scholars have recently begun to critique the tripartite language policies in India for not being responsive to plurilingual societal realities within which schools function (see Canagarajah and Ashraf 2013; Khubchandani 2008). It would be interesting to study in more detail how this organic plurilingualism translates into both formal and informal practices inside classrooms. There is also an emerging body of work on translanguaging, which needs to be supplemented with accounts located in actual classroom pedagogical practices (Canagarajah 2013a, b; Jain 2014; Pennycook 2008). While most scholarship on translanguaging so far has focused on US contexts and classrooms, it would be interesting to understand how translanguaging plays out in the context of bilingual education research in South Asian contexts.

As is the case for Pakistan, bilingual education research in India also thus needs more classroom and instruction-based accounts by both practitioners and academics. More academic researchers could make bilingual and biliterate classroom practices the focus of their study. In turn, more teachers could engage in research to generate narratives from inside out (Cochran-Smith and Lytle 1993; Motha et al. 2012). Both academic and practitioner researchers could therefore provide practice-based perspectives that balance theoretical and empirical research reports from large studies.

Given the common history between India and Pakistan, and the current linguistic realities, further research studies that incorporate cross-national perspectives on bilingual education would be a valuable contribution to existing literature. Such research could be expanded to include other countries in the region, including Bangladesh, Nepal, Bhutan, and Sri Lanka, to generate a comprehensive picture of bilingual education in South Asia.

Cross-References

- ▶ [Bilingual Education Policy](#)
- ▶ [Bilingual Education: What the Research Tells Us](#)
- ▶ [Translanguaging in Bilingual Education](#)

Related Articles in the Encyclopedia of Language and Education

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Bilingual and Mother Tongue-Based Multilingual Education in the Philippines

Ruanni Tupas and Isabel Pefianco Martin

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Abstract

Bilingual education in the Philippines – the use of English in mathematics and science and Filipino, the national language, in all other subjects – is a complex story of postcolonial, neocolonial, nationalist, and ethnolinguistic ideologies and relationships. Thus, the recent law mandating the use of the mother tongues as media of instruction (MOI) in early primary years did not come easy. Called Mother Tongue-Based Multilingual Education (MTB-MLE), this recent linguistic

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structure of educational provision had to navigate the intricate discursive terrains of language policy-making in order to find a strategic space from which to articulate alternative and marginalized visions of education and nation-building in the country. This chapter provides a brief history of the language-in-education debates in the country, assesses the hits and misses of bilingual education, and takes stock of the arguments for and against the use of the mother tongues leading to the promulgation of a comprehensive basic education law which includes MTB-MLE. In the end, however, languages-in-education are never just about languages alone; they are about struggles for power and for contending visions of the nation. MTB-MLE promises to address different forms of inequities in Philippine society, but ideological and structural challenges against it are massive and relentless.

Keywords

Bilingual education • MTB-MLE • Philippines

Introduction

The Philippines is the only country in Southeast Asia today which has a national policy institutionalizing and enacting as law the “Mother Tongue-Based Multilingual Education” (MTB-MLE) in mainstream formal education. In 2009, MTB-MLE was institutionalized through the Department of Education (DepEd) Order No. 74. More recently, a new law broadened the coverage of MTB-MLE through a legally binding “Enhanced Basic Education Act of 2013,” signed by President Benigno Aquino III. The law stipulates, among many other things, the use of the mother tongue (MT) as the primary medium of instruction (MOI) in kindergarten and the first 3 years of elementary education. English and Filipino are to be introduced through a transition program from the 4th to the 6th grade until such time that these two languages may be used as primary MOI in secondary education.

The legitimization of the mother tongues as languages of instruction has not come easy. It came in the heels of the continued dominance of bilingual education in the country – the mode of educational provision since the early 1970s during which a political compromise was reached to use both English and Tagalog-based Filipino as the two MOI in the schools. English was to be the MOI in the teaching of mathematics and science and the national language in the teaching of all other subjects in the curriculum.

This chapter tracks the development of bilingual education in the Philippines and the recent challenge of the mother tongues. (1) How did bilingual education come about? (2) What has it accomplished or failed to do? (3) How did MTB-MLE position itself discursively in order to supplant the dominance of bilingual education in the country? (4) What are the current challenges facing the implementation of MTB-MLE itself? Addressing these questions unravels the linguistic history of the country as hugely contested and demonstrating that “the questions of language are

inseparable from the questions of the modes of production, questions of independence and questions of the nation” (Tinio 2009, p. 3).

Early Developments: Tagalog and Linguistic Self-determination in the Early Twentieth Century Philippines

The American colonization of the Philippines began during the Philippine-American War in 1898–1901 during which Filipinos who just declared their independence from 333 years of Spanish colonization found themselves fighting yet another group of colonizers. Locating the twentieth century linguistic history of the Philippines within the brutalities of the Philippine-American War and the heroics of Philippine resistance against the new occupation could rewrite the story of Philippine language policy-making as one of tension and conflict and not simply of acquiescence and benevolent assimilation. Tinio (2009) argues convincingly that much has been written about armed struggle against American colonialism, “but of linguistic self-determination during this coercive period, little is known” (p. 24). She details enactments of everyday linguistic nationalism, even in birthday parties and other seemingly mundane social activities, during which Tagalog-speaking Filipinos would rail against the imposition of English upon their lives and fight against the possible demise of Tagalog and other Philippine languages.

Such early expressions of linguistic resistance to English mainly by Tagalog writers are a hugely important backdrop against which bilingual education in the country should be understood. The policy of bilingual education in the Philippines, which was institutionalized in 1974, was a political crisscrossing of different agendas in the nation-building project of the country. On the one hand, the policy perpetuated English-induced infrastructures of education which even then already privileged the small Filipino elite (Constantino 1982); on the other hand, it also aimed to dismantle these infrastructures through the rhetoric of nationalism or anti-colonialism and the deployment of Tagalog (later called Filipino), the national language, as MOI.

But why Tagalog and not any other Philippine language? As shown in the work of Tinio (2009), Tagalog throughout the country’s colonial history with Spain and the United States enjoyed a literary and an anti-colonial tradition, and this argument supposedly proved useful in justifying calls for it to be the national language of the Philippines. In the 1930s, Tagalog was indeed established as the national language of the country amidst strong opposition from non-Tagalog politicians in Congress (Gonzalez 1980). Ethnolinguistic or subnational resistance to Tagalog (renamed “Pilipino” in 1949 and “Filipino” in 1987) would prove to be one of the greatest challenges to the acceptance and implementation of bilingual education because regional sentiments against Tagalog-based Filipino would then coalesce with pro-English views (Tupas 2007).

Contributions, Problems, and Challenges

Achievements of Bilingual Education

At any rate, it was through bilingual education that Tagalog-based Filipino consolidated its position as the most dominant local language in the country (Gonzalez 1980). It drew on the early rhetoric and practice of linguistic self-determination of Tagalog-speaking speakers who resisted the imposition of English (Tinio 2009); it also drew on the more anti-colonial discourse of the 1960s and 1970s (Tupas 2007) during which anti-American sentiments took on more overt forms in street demonstrations and underground movements because of widespread beliefs that despite gaining political independence from the United States in 1946, the structures and ideologies of American neocolonialism continued to control much of Philippine life (Schirmer and Shalom 1987). It was during this time – “when nationalism and the search for roots became fashionable” (Mulder 1990, p. 86) – that the notion of the “miseducation” of the Filipino people (Constantino 1982) gained much political traction and undergirded the anti-English discourse of bilingual education: “English became the wedge that separated the Filipinos from their past and later was to separate educated Filipinos from the masses of their countrymen. English introduced the Filipinos to a strange, new world” (p. 6).

Indeed, one of the accomplishments of bilingual education in the Philippines has been the insertion of Tagalog-based Filipino (from hereon to be referred simply as “Filipino”) in educational provision across all levels of schooling. By limiting English to the teaching of Mathematics and Science, it helped Filipino to generate and legitimize indigenous knowledge and worldviews, resulting in the intellectualization of the national language (i.e., to some extent) (Sibayan 1991), as well as in the spread of the language as the national lingua franca beyond the Tagalog-speaking region. One example was the propagation of the concept and intellectual movement of *Pantayong Pananaw* (“From-us-for-us perspective”) which deployed various terms culled from the Filipino language through which history and the social sciences could be understood through the lens of the Filipino people (Guillermo 2003). The spread of Filipino was also aided in no small measure by the mass media and interisland commercial exchanges, such that despite pockets of resistance to its institutionalization as MOI and the sole national language of the country, sentiments on the ground increasingly became more accommodating of Filipino as the national language, although still to a much less degree as MOI (e.g., Espiritu 1999). In the words of Sibayan (1991), “The change in the expectations of the Filipino people on the status, role, and function of Filipino is quite amazing” (p. 69). Bilingual education, thus, has cemented the role of Filipino as the country’s main interethnic lingua franca elevating it to a national symbol of unity (which is contested even today) through which the Filipino people’s national identity and aspirations could allegedly be expressed.

Problems and Criticisms of Bilingual Education

However, global and local socioeconomic and political formations continued to perpetuate the symbolic dominance of English in the country (Tupas 2008a). In the 1970s and the 1980s during which bilingual education was institutionalized and took root, the whole Philippine society under the Marcos dictatorship was increasingly being reconfigured toward an export-driven liberalized economy under the aegis of the World Bank and other global institutions (Tupas 2008a). Among many things, this meant deploying the infrastructures of bilingual education to train young Filipino bodies to become export-ready labor commodities to help keep the fledgling economy adrift. A key feature of the politics of development aid during this period was the well-documented collusion between the dictatorship and the US-led global economic institutions (Bello et al. 1982). One example of this was the infusion of funds into the Philippines in exchange for control over the content and management of education through which the so-called benefits of labor export, the gains of dictatorship, and the triumph of globalization could be heralded as “truths” (Constantino 1999). During this period, school texts were “supervised and financed by the World Bank” (Mulder 1990, p. 85), thus the content of bilingual education was essentially ideologically suspect, if not flawed.

Constantino’s (1982) claim about English as a social wedge between the small Filipino elite and the great majority of Filipinos masses would be poignantly true here, although in a quite ironic fashion because bilingual education was by itself partly a product of the anti-English rhetoric he helped articulate; in serving the economy, bilingual education contributed hugely to the tiering of English linguistic proficiencies which would then correlate with the kinds of jobs and economic opportunities available to different socioeconomic classes in Philippine society (Tupas 2008a; Sibayan and Gonzalez 1996). The 1970s saw the emergence of the discourse of English as a necessary social and economic good in the making of what Lorente (2012) now calls the “workers of the world.”

True, as Hau and Tinio (2003) contend, that “Filipino appears to stand a better chance” (p. 347) to address the “compelling need in the Philippines to create linguistic public spaces where different classes and groups can meet on a common linguistic ground” (ibid.). Nevertheless, it was hijacked by the collusive agenda of the State and global economic institutions and their guardians. The first and most comprehensive evaluation of the accomplishments of bilingual education in the country (Gonzalez and Sibayan 1988) found that more than MOI, the most significant contributor to success in learning in school in the country is the socioeconomic composition of the student population which correlates with quality of teachers, salary, and proximity to an urban environment. In other words, bilingual education failed to overturn “opportunities for advancement [which] seem to be largely restricted to those who already enjoy social and economic advantages in Philippine society” (Bernardo 2004, p. 26).

The Challenge of the Mother Tongues

It is in the context of the mixed results of bilingual education in the Philippines that the most recent campaign to use the mother tongues as the primary MOI came about. This does not in any way mean that mother tongue-based education is a fairly new concept in the country. In fact, several works along this line – whether in terms of research or in terms of educational initiatives – have had some significant, albeit limited, impact on education in the country.

As mentioned earlier, the argument that an indigenous language is far more effective than English as a language of education and an expression of national identity and culture was already circulating in the beginning of the American colonization (Tinio 2009). A critique of the sole use of English in school during the early decades of American rule was raised by Saleeby (1924) who also argued for the superiority of the vernacular language as MOI. In 1939, the Secretary of Education Jorge Bocobo released an order affirming the sole use of English as MOI but allowing primary school teachers to use the local languages as supplementary languages of education (Bernardo 2004). The hugely popular longitudinal experiment to use Hiligaynon (a language used in the Western Visayas region and some parts of Mindanao) as MOI yielded positive results in favor of the use of local languages, instead of English, as MOI in primary school (Aguilar 1961; Bernardo 2004). The UNESCO (1953) treatise on vernacular languages also endorsed the use of local languages as MOI. Additionally, prior to the institutionalization of bilingual education in 1974, vernacular education in Primary 1 and 2 had already been in place since 1957 through the promulgation of the Revised Philippine Education Program (Bureau of Public Schools 1957). All these initiatives and endorsements, however, occurred under the shadows of English as the sole MOI and of Tagalog as the national language. The hegemonic discourses of English and the national language eased out the mother tongues from the project of imagining the nation.

Thus, anti-colonial and anti-English sentiments, as well as expressions of national identity and nationalism, would discursively congregate around Filipino as the national language. This point is concisely but lucidly articulated by Tinio (2009): “the idea of nation and (Tagalog) language” is “inextricable from each other” (p. 24). This had effectively excluded the rest of the mother tongues from any language-in-education debate and policy-making in the country.

For the past decade or so, however, several educational and sociolinguistic trends have contributed to the consolidation of the mother tongue position in education.

- First, as mentioned above, there has been growing frustration over bilingual education, especially after a series of results from *Trends in International Mathematics and Science Study* (TIMSS) showed the Philippines garnering dismally low scores in both subjects (Filipino students still rate low in math and science 2000).
- Second, a bill was filed in Philippine Congress with the aim of making English the sole MOI, thus practically attempting to replace bilingual education with another type of educational provision reminiscent of colonial education (Lorente 2012).
- And third, empirically driven local research on the effectiveness of the mother tongues in the delivery of educational content has shown overwhelmingly

positive results, even in the context of English language teaching where the use of the mother tongues to teach it yielded better results compared with the use of English to teach English (Dekker and Young 2005; Nolasco et al. 2010).

The Mother Tongue Strategy for Legitimization

Amidst all this, however, a discursive maneuvering was needed to tear apart the seemingly impenetrable discourses of bilingual education, specifically of English and of Filipino, in order to make the case of the mother tongues much more appealing to all stakeholders of education (Tupas 2007). Such maneuvering took the form of a discursive retreat from emphasizing the role of local languages in reconnecting communities with their local or regional cultural identities and cultures to highlighting the educational benefits of the mother tongues. The rhetorical appeal of the mother tongue position was deceptively plain and simple: if local and international research has overwhelmingly shown that pupils learn best using languages they are most familiar with, why are these languages not the MOI in the schools? The cultural argument continues to lurk around the debates, of course (Gunigundo 2010; Tupas 2007), but this time the most significant feature of the argument is the educational efficacy of the mother tongues, effectively sidelining the unhelpful framing of languages as global, national, and regional/local and relocating the mother tongues in the center of education. Thus, the emphasis of the Department of Education order, “Institutionalizing mother tongue-based multilingual education (MLE),” is on the teaching and learning benefits of mother tongues as primary MOI, while the identity or cultural argument is completely absent (DepED Order No. 74, 2009).

The implications of the privileging of the educational argument over the cultural one have been politically and discursively massive. Filipino is *not* the mother tongue of a majority of Filipinos so it cannot be that it is the language most familiar to most Filipino pupils. Consequently, the issue of Filipino as the national language has been decoupled from the issue of Filipino as MOI. As mentioned earlier, several studies have shown that resistance to Filipino as the national language has waned, although this cannot be said about Filipino as MOI. What this means is that a national language does not automatically make it the most viable and appropriate MOI. What this also means is that nation-building is not the exclusive dominion of Filipino; the imagining of the nation is also possible through the mother tongues (Nolasco et al. 2010).

Work in Progress: The Implementation of MTB-MLE

Even with the MTB-MLE policy already in place, lawmakers persist in attempts to subvert the place of mother tongues in basic education. Four bills¹ that aim to strengthen the use of English in education are presently pending in the 16th

¹These four bills were individually authored by the following lawmakers: Macapagal-Arroyo (H.B. 311), del Mar (H.B. 366), Gullas, Jr. (H.B. 1339), and Olivarez (H.B. 3702).

Congress. The author of one bill (H. B. 1339), Cebu Representative Gerald Anthony Gullas Jr., defended his proposal with the promise that English would be “forcefully promoted as the language of interaction in schools” (Manila Standard Today 2013).

The promotion of MTB-MLE and its eventual institutionalization through a DepEd Order were bolstered by the findings of a longitudinal-experimental study on the use of the mother tongue in an elementary school in Lubuagan, Kalinga Province. The study, which was initiated in 1998 by the Summer Institute of Linguistics (SIL), compared the learning outcomes of two sets of students, one taught in English and Filipino (bilingual policy) and the other taught in Lilubuangan, which is the mother tongue of the community. The study yielded significant results, the most notable being the achievement of higher test scores of students who attended classes in the mother tongue. However, the Lubuagan study also found some negative feedback in the implementation of MTB-MLE, specifically from the teachers who reported their difficulties in preparing instructional materials in the mother tongue. Parents also shared their anxieties about the teaching strategy as hampering English language teaching and learning (Dumatog and Dekker 2003). These reactions are the same responses of teachers and parents to the MTB-MLE policy implemented in 2009 (Skoropinski 2013).

At the outset of implementation, concern for lack of instructional materials in the mother tongues is certainly valid, especially since the policy seems to have been implemented in “a headlong rush” by the DepEd (Nolasco 2012). Teacher training has been described as “weeklong camps” where teachers are “herded by the hundreds” and “trained haphazardly by instructors who are mostly unfamiliar with MTBMLE concepts” (Nolasco 2012). However, many teachers have found creative ways of making do with limited resources available, such as creating their own big books (Skoropinski 2013) and consulting a variety of MTB-MLE blog sites that have begun to proliferate in the country. Some of these blog sites are dedicated to specific languages such as Kapampangan (<http://mtbmle-kapampangan.blogspot.com>). The DepEd has also recently created the Learning Resource Management and Development System (LRMDS), a portal where teachers may access lesson plans and learning materials in the mother tongues (<http://lrmds.deped.gov.ph>).

Other than the concern for lack of instructional materials, stakeholders have also criticized the DepEd for excluding some languages in the MTB-MLE policy. Guidelines issued by the DepEd identifies 19 local languages to be used in schools, namely, Aklanon, Bikol, Cebuano, Chabacano, Hiligaynon, Iloko, Ivatan, Kapampangan, Kinaray-a, Maguindanaoan, Maranao, Pangasinense, Sambal, Surigaonon, Tagalog, Tausug, Waray, Yakan, and Ybanag (Department of Education 2013). These languages are considered by DepEd as major Philippine languages, thus their inclusion in MTB-MLE. However, as many teachers have lamented, some regions do not accept any of the 19 languages as their mother tongue. A case in point is Romblon, which is an island in southern Luzon that speaks what is often referred to as southern Tagalog, but whose mother tongue is Romblomanon, not Tagalog, as DepEd has declared it to be. Thus, issues of inclusion and exclusion have posed challenges to the smooth implementation of the MTB-MLE policy.

A successful MTB-MLE policy rests on the existence and acceptance of an orthographic system for the mother tongues to be used in schools. However, for

some of the Philippine languages included in the policy, this orthographic system is either not in place or unacceptable to stakeholders. Attempts to standardize a spelling system, such as the case of the Ilocano language, have so far been contentious (170+ Talaytayan MLE Inc 2014). In addition, teachers themselves have reported that they are not knowledgeable enough about their own mother tongues to teach them. Nolasco (2012) has reported that “teachers are not being given enough time to learn their own L1, particularly for literacy, much less learn how to teach in the L1. Teachers who think that they are implementing MLE may not be doing much different from what they did previously” (n.p.).

Finally, a formidable challenge that the policy must overcome are the prevailing attitudes to languages in the Philippines, especially English (Tupas 2015). A large majority of Filipinos continue to embrace the English language as the only language through which scientific knowledge and economic stability are gained (Martin 2010; Mahboob and Cruz 2013). While these attitudes and perceptions exist, the intended benefits of MTB-MLE will remain unattainable.

Conclusion: Future Directions

The politics of language in the Philippines does not simply revolve around English, Filipino, and the rest of the Philippine languages or mother tongues, but more importantly around values, ideologies, attitudes, and contending visions of nation-building that accrue to these languages. English, as a colonial language, must be resisted as it represented “miseducation”; Tagalog-based Filipino, the anti-colonial language, must resist English on behalf of all the other mother tongues in order to pave the way for reclaiming our rights to our own languages, identities, and cultures, as well as for envisioning a nation free of foreign intervention. In the process, all other Philippine mother tongues are silenced or consigned into the margins of nation-building, defined as “regional” by “nationalists” because of their view that the imagining of the nation could only be accomplished through the national language, Filipino. The institutionalization of bilingual education, therefore, was a continuing narrative of imagining the nation, one that desired freedom from foreign powers but one that was nevertheless always vulnerable to the economic, political, and ideological dictates of other more powerful countries. In hindsight, bilingual education in English and Filipino was more of a political compromise than educational wisdom; it has helped spread Filipino across the archipelago, giving Filipinos a language that could help bridge interethnic communication, but essentially it has not punctured in any way the symbolic power of English. The resurgence of mother tongues as languages of instruction promises to be a pedagogically sound and politically inclusive vision of education. It is not anti-English and anti-Filipino in the sense that it continues to promote the teaching of both languages in all levels of education; it ultimately addresses different forms of inequities in Philippine society.

Of course, languages-in-education are never just about languages alone; they are about struggles for power and for contending visions of the nation. The ideological and structural challenges against MTB-MLE are massive – capitalist globalization is

English-speaking to a large extent, and nationalisms and nationalist projects, albeit always contested, continue to be dictated largely by the most dominant cultural groups. Nevertheless, on the ground it is clear that Filipinos also confront these challenges in small but effective ways. For example, some teachers, science teachers in particular, have demonstrated their resistance to the English-only position by code-switching freely in their classes (Martin 2006). English teachers have also expressed their frustration over the lack of student responses whenever English is used exclusively in their classrooms (Martin 2010). Moreover, many local and rural Filipinos have drawn upon the strengths of their own languages to engage in a parallel community-driven “legal” system which settles disputes (Franco 2007) without recourse to the use of English and Filipino and without elevating them to the formal courts where these two are the main languages of proceedings. The most successful attempts to institutionalize mother tongue use in school and other important and official domains of local governance have been those which empower local people – from the mayor and other local officials to teachers, health workers, and parents – to decide on the social development needs of their communities. A community’s steadfast belief in the usefulness of its mother tongues is driven less by a (nationally determined) language policy, but by its own decision to engage its own people in effective and aggressive health-care campaigns, tax collection, agrarian development, and mass-based literacy programs from where the mother tongues emerge as the languages of choice (Canieso-Doronila 2001; Tupas 2008b).

MTB-MLE is now part of a law enhancing basic education in the Philippines, and to its credit it has stuck to its strategy of sending out one clear message to all stakeholders: that the mother tongues – or languages most familiar to pupils – are the most effective languages of instruction. Despite the complexity of the issue, this is how MTB-MLE as part of a law came out victorious amidst threats of lawsuits from pro-Filipino advocates; protests from parents, teachers, and some people in the business sector; and, more importantly, intense probing from the Senate, the House of Representatives, and the Office of the Philippine President whose collective approval was needed for it to become law. Perhaps the same simple and singular message about the viability and desirability of MTB-MLE should now be made to emerge from the local communities themselves through constant dialogue and consultation among the different local stakeholders (Canieso-Doronila 2001). In other words, to increase the life chances of these communities, MTB-MLE cannot work in isolation; it has to be embedded in the processes and projects of social development (Tupas 2008a).

Related Articles in the Encyclopedia of Language and Education

James Tollefson: [Language Planning in Education](#). In volume: Language Policy and Political Issues in Education

Kimmo Kosonen: [Language Policy and Education in Southeast Asia](#). In volume: Language Policy and Political Issues in Education

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Bilingual Education in Central Asia

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Abstract

Education in Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan occurs in a complex multiethnic language ecology which includes many languages besides each republic's titular languages: Kazakh, Kyrgyz, Tajik, Turkmen, and Uzbek. The chapter reviews multilingualism, languages, and education in the region from pre-Soviet to Soviet and post-Soviet period, focusing on informal and formal approaches to bi-/multilingualism in education in the region. Early Soviet policy supported instruction in all languages, yet that policy changed over time to one that supported the dominance of Russian-medium schools. At independence in 1991, each republic had to balance multiple aims: raising the status of the titular language relative to Russian, providing effective mother tongue and titular language education to all, and developing proficiency in Russian as a second/foreign language and in global languages such as English. Accordingly, bi-/multilingual education is increasingly recognized as having enormous potential as a means to achieving this balance in Central Asia.

Keywords

Bilingual education • Trilingual education • Multilingualism • Plurilingualism • Content and Language Integrated Learning (CLIL) • Committee for the Elimination of Racial Discrimination (CERD) • Organization for Security and Cooperation in Europe (OSCE) • Language policy • Language rights • Language of instruction (LOI) • Translanguaging • Central Asia • Post-Soviet • Kazakhstan • Kyrgyzstan • Tajikistan • Turkmenistan • Uzbekistan

Introduction

The language ecology of Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan features many languages¹ besides the titular languages: Kazakh, Kyrgyz, Tajik, Turkmen, and Uzbek.² While early Soviet policy supported instruction

¹These include other languages of Central and Inner Asia, such as Balochi, Dungan, Karakalpak, Kurdish, Pamiri languages, Uighur, Volga Tatar, Yaghnobi, languages of relatively recent voluntary immigrants to the region, such as, Armenian, Azerbaijani, Belarusian, Russian, Ukrainian; languages of involuntary immigrants to the region: Crimean Tatar, German, Korean, Meshketian Turkish. This makes Central Asia arguably the most ethnically and sociolinguistically complex region of the former Soviet Union. Kazakh, Karakalpak, Kyrgyz, Meshketian Turkish, Tatar, Turkmen, Uighur and Uzbek are Turkic languages; Balochi, Kurdish, Pamiri languages, Tajik and Yaghnobi are Iranian languages; Dungan is a dialect of Chinese. Spoken languages often form dialect continua with vernacular dialects showing features of the neighboring languages. For more, see B. Comrie, 1981, *The languages of the Soviet Union*, Cambridge University Press, Cambridge.

²So called since in the national delimitation of the 1920s the region was divided into republics each intended to have one majority nationality for whom the republic was named. For a review of the script reforms complicating language and literacy development in Central Asia see Landau and Kellner-Heinkele 2012; Schlyter 2011, 2013.

in all languages, monolingual Russian-medium schooling came to dominate education. At independence in 1991, each republic needed to raise the titular language's status, provide effective mother tongue and titular language education to all, and develop proficiency in global languages. Increasingly, bi-/multilingual education is seen as a means to balance these aims (Fierman and Garibova 2010; Landau and Kellner-Heinkele 2012; Lewis 1972; Mehisto et al. 2014; OSCE 2014; Schlyter 2013).³

Early Developments

Early Central Asian bilingualism developed through informal contact among multiple Iranian-Turkic language varieties (Bahry 2015a; Schlyter 2013) alongside the formal use of classical Arabic, Persian, and Chagatai Turki. In the late nineteenth/early twentieth century, reformers (*jadids*) added modern subjects and languages to the Islamic curriculum, while Russian imperial schools before 1917 developed several forms of bilingual education for non-Russian subjects (Dowler 2001; Khalid 1998).

Early Soviet language policy for non-Russians was based on modernist notions of a link between language and nationality and the political importance of mass literacy in a modern standard language based on the vernacular as necessary for development. Thus, it abandoned the use of Central Asian classical languages and constructed new nationalities and standard languages. All students were taught in their assigned nationality's first language (L1) with compulsory titular language and optional Russian study. This policy made great inroads toward mass L1 literacy, but had little effect in developing proficiency in Russian.⁴ After 1938, Russian as a second language (RSL) course became compulsory, while schools with single languages of instruction (LOI) declined. Later parallel-medium schools (also called mixed schools in Russian) with separate language streams and oral Russian for common activities developed so that titular, Russian, parallel-medium, and single-medium minority schools coexisted. After 1958, parents could choose the children's LOI, and many sent children to Russian-medium boarding schools, leading to subtractive

³Kazakhstan, Kyrgyz Republic, Tajikistan, Turkmenistan and Uzbekistan were all constituent republics of the USSR before 1991. For more geopolitical and historical background of Central Asia, see E. Allworth (Ed), (1994), *Central Asia: 130 years of Russian dominance*. Durham, NC, and London: Duke University Press.

⁴It has been suggested that this strong promotion of non-Russian languages was influenced by Lenin's experience growing up in the multilingual Volga region where his father was inspector of minority language schools (I. Kreindler, 1977, A Neglected Source of Lenin's Nationality Policy, *Slavic Review*, 36(1), 86–100.

local-Russian bilingualism⁵ (Lewis 1972; Shorish 1988; Landau and Kellner-Heinkele 2012; Schlyter 2013).

Varied school types produced different degrees of bilingualism: from bare second language (L2) Russian comprehension to local-Russian bilingualism and often language shift to Russian. Some members of titular cultural élites tacitly deplored this, but not until the 1980s was the titular language made the state language and Russian an official language or language of interethnic communication (Lewis 1972; Shorish 1988; Landau and Kellner-Heinkele 2012; Schlyter 2013).

Since independence in 1991, language policies vary: Turkmenistan only guarantees education in the state language, while other republics provide other LOIs where numbers warrant, and bi-/multilingual education are more often discussed as means to raise second and foreign language proficiency (Landau and Kellner-Heinkele 2012; Mehisto et al. 2014; Schlyter 2013).

Major Contributions

Soviet scholarship focused on studying proficiency of non-Russians in Russian, bilingualism in local languages, Russophone monolingualism, and non-titular preference for Russian- over titular-medium education were little explored and unproblematized in publications by Soviet scholars. At the same time Soviet and international research based on Soviet statistics and surveys on “native language” overestimated minority language maintenance, since respondents gave their national language as their native language, regardless of actual use and proficiency, and as a result underestimated language shift, thus ignoring schools’ role in this process (Guboglo 1984). Central Asian researchers were well aware of the problems of asymmetrical bilingualism, but these views went unpublished until the late 1980s when the Perestroika reforms were underway and discussion of the nationality problems and the low status of non-Russian language became politically acceptable (Khasanov 1987; Shorish 1988; Jamshedov 1991).

Western research using language and education data to study identities and political attachment was hampered by issues of Soviet data availability and reliability. Lewis (1972) uses Russian sources to analyze Soviet language policies and their educational impact, providing useful information on Central Asia and policy implementation in schools, including second language methodology and the plethora of school-types: single-medium national schools (standard model), mixed-medium

⁵Until 1958, children had to be enrolled in a national school of their ethnicity, if one was available. For ethnicities whose language was no longer used as a medium of instruction and for other ethnicities living outside of the territory of compact settlement, there was a choice of titular-medium or Russian-medium schooling, with Russian-medium instruction the usual preference. After 1958, many parents, desiring Russian proficiency for their children’s success opted to convert their national school to a Russian-medium school. Of course, in the sociolinguistic dynamic that existed the choice was not entirely free. See Lewis 1972 for more on these laws and their impact.

classes (single-medium L2 schools where teachers paraphrase L2 instruction in students' L1), parallel-medium schools (two or more single-medium schools housed together with Russian as language of wider communication (LWC)), and schools providing dual-medium bilingual education that were outlawed in the 1920s. Shorish (1988) reported a rift between Russian-dominant teachers favoring direct instruction with no reference to students' L1 and local teachers who favored bilingual RSL approaches, continuing a century-old controversy between comparative bilingual methods requiring Central Asian teachers and the natural method demanding monolingual teaching favored by monolingual Russophones (Dowler 2001).

Recent Developments and Work in Progress

Language and Education in Turkmenistan

Since independence, Russian ceased to be an official language, with Turkmen the sole state language. Since then, emigration of non-Turkmens has been so high that the titular Turkmen ethnicity's share of the population reached 94.7 % in 2003, the highest for any titular ethnicity in Central Asia and the lowest minority population of the region: Uzbeks, 2 %; Russians, 1.8 %; and other ethnicities combined, 1.5 % (see Table 1). The main focus of Turkmenistan's language policy is for Turkmen to replace Russian not only as de jure but as de facto state language used for high status functions such as education, through almost exclusive use of Turkmen as LOI and through shifting from a Cyrillic to Romanized script similar to the one used in Turkey.

Before independence, schools in rural areas and small cities had Turkmen LOI and taught Russian language as a subject, with Russian-medium schools common in larger cities, while several minorities received education in their languages. After 1991, the LOI has been Turkmen with mandatory second language study of English and Russian, while foreign languages could be LOIs in private schools. Some primary schools retained Russian, Kazakh, and Uzbek LOIs, while steadily Turkmenizing through restrictions of new enrolments in minority language tracks. In 1997/1998, there were 1,938 Turkmen-, 250 Russian-, 90 Uzbek-, and 40 Kazakh-medium schools. By 2009, few Russian LOI schools remained, and other minority schools had closed, despite talks with Kazakhstan to maintain one Kazakh school (Aref'ev 2012; Clement 2005; Landau and Kellner-Heinkele 2012; Peyrouse 2010). The proportion of those claiming proficiency in Russian has dropped in 2010, as a first language to 2.9 % and as a second language to 8.8 %, with 88.8 % claiming no Russian ability (Aref'ev. 2012, pp. 146–147), suggesting relative success in raising the status of the Turkmen language.

As a signatory to the United Nations Convention on the Elimination of Racial Discrimination (CERD), Turkmenistan, like the other republics of Central Asia, is bound to submit reports to and answer queries from CERD on the status of minorities and their languages. In 2004, for example, Turkmenistan stated its aim of creating "habits of equality, friendship and comradeship, irrespective of social status, wealth,

Table 1 Population data for Central Asia by Republic and nationality/ethnicity

	Kazakhstan		Kyrgyzstan		Tajikistan		Turkmenistan		Uzbekistan	
	2014	2014	2014	2014	2010	2003	2008	2003	2008	
	N	%	N	%	N	N	%	N	%	
Total	17,160,774	100	5,776,600	100.0	7,564,502	6,300,000	100	27,072,174	100	
Titular nationality	11,244,547	65.5	4,193,900	72.6	6,373,834	5,966,100	84.3	21,962,080	81.1	
Russian	3,685,009	21.5	369,900	6.4	34,838	113,400	0.5	912,959	3.4	
Kazakh	11,244,547	65.5	33,700	0.6	595	–	0.0	862,255	3.2	
Kyrgyz	–	–	4,193,900	72.6	60,715	–	0.8	241,507	0.9	
Tajik	42143	0.2	50,200	0.9	6,373,834	–	84.3	1,327,249	4.9	
Turkmen	–	–	–	–	15171	5966100	0.2	162932	0.6	
Uzbek	521,252	3.0	836,100	14.5	1,016445	126,000	13.4	21,962,080	81.1	
Azerbaijani	98,646	0.6	18,900	0.3	–	–	–	40,437	0.1	
Belarusian	60,295	0.4	1,000	0.0	104	–	0.0	20,631	0.1	
Chechen	32,252	0.2	1,700	0	20	–	0.0	420,891	1.6	
Dungan	62,029	0.4	64,600	1.1	1	–	0.0	–	–	
German	181,928	1.1	8,500	0.1	446	–	0.0	4,762	0.0	
Karakalpak	–	–	–	–	4	–	0.0	593,401	2.2	
Korean	105,400	0.6	16,800	0.3	634	–	0.0	147,680	0.5	
Tatars	203,108	1.2	28,100	0.5	6,495	–	0.1	230,572	0.9	
Turks	104,792	0.6	41,000	0.7	–	–	–	–	–	
Uighurs	246,777	1.4	52,500	0.9	276	–	0.0	–	–	
Ukrainians	301,346	1.8	14,500	0.3	1,090	–	0.0	85,302	0.3	
Others	271,250	1.5	40,600	0.7	53,834	94,500	0.7	59,516	0.2	

Sources: Government population data from: Kazakhstan Committee on Statistics (2014), Kyrgyzstan National Statistics Committee (2014), Tajikistan (2012), Turkmenistan, CERD (2005, pp. 4–5), Uzbekistan, CERD (2010, p. 59). Note: Uzbek figures for Tajikistan include small Turkic tribal groups now counted separately that were previously counted as Uzbek

race or ethnic background” through schooling (CERD 2005, p. 34). Nevertheless, CERD has expressed concern about closures of schools with Uzbek, Russian, Kazakh, and Armenian LOIs and urged more provision for minority groups of “instruction in and study of their mother tongue, including through the establishment of schools and provision of textbooks in minority languages” (CERD 2012, p.5).

The Uzbek minority, formerly taught in standard Uzbek, now studies in Turkmen. Turkmen Uzbek has many Turkmen-like features (Fierman 2011); thus, communication difficulties between speakers of Turkmenized and standard Uzbek in Uzbekistan (Turaeva 2013) suggest similar difficulties in Turkmenistan. A single Russian-medium school remains in the capital city, which receives support from Turkmenistan’s government and investment from Russia, and uses Russia’s curriculum and textbooks while including three subjects related to Turkmen language and knowledge, thus allowing graduates to apply for admission to higher education in the Russian Federation. Students are apparently drawn largely from the Russophone elite of the capital (Aref’ev 2012; Peyrouse 2010). Until recently, there were 14 private schools with teachers from Turkmenistan and Turkey, which were closed by the state in 2011, and reportedly were popular for their trilingual education model that developed proficiency in Turkmen, Russian, and English through their use as LOIs (Clement 2013; Peyrouse 2010).

Despite the monolingual Turkmen emphasis of language-in-education policy, Turkmenistan has had several models for education: titular language monolingual programs in the majority of state schools; one elite Russian-Turkmen school, following a similar model to the pre-Soviet Russian-local schools with universal academic subjects taught in Russian and local history, geography, and literature taught in Turkmen; in addition trilingual Content and Language Integrated Learning (CLIL)-type education used by private Turkish schools has become familiar, and in former minority-LOI schools, there is likely to be a certain amount of unofficial mixed bilingual education where minority teachers may supplement Turkmen instruction with oral explanation in minority children’s LOI.

Language and Education in Uzbekistan

After independence, Uzbek has become the sole official language. Uzbekistan’s language policy, like Turkmenistan’s, focuses on making the state language, Uzbek, the main state language, a goal aided by modern Uzbek’s inheritance of the literary tradition of Chagatai (in Soviet terms, *Middle Uzbek*) and has also adopted a Romanized writing system. Although there have been population shifts due to post-independence emigration, contemporary Uzbekistan is more multiethnic and multilingual than Turkmenistan: by 2008, 81 % of its population was identified as ethnic Uzbek, 4.9 % Tajik, 3.4 % Russian, 3.2 % Kazakh, 2.2 % Karakalpak, and 5.2 % other nationalities (see Table 1). Estimates are that Uzbek is spoken by 74.3 % of the population, followed by Russian (14.2 %), Tajik (4.4 %), and other languages (7.1 %) (The World Factbook Uzbekistan 2015). At the same time, Uzbekistan retains a considerable number of schools with minority LOIs, although fewer

than before independence. However, minority-medium schooling has not been restricted by central policy as in Turkmenistan; instead, decisions on maintaining minority-medium programs or converting them to Uzbek-medium are left to minority parents, similar to how minority-parents often opted for Russian-medium schools after 1958.

Research since independence centers on change from Cyrillic to Latin script for Uzbek, status and corpus development of Uzbek as the state language, and debates about the status of Russian; considerable state expense has been devoted towards preparing documents, including school textbooks, in the new script (Landau and Kellner-Heinkele 2012; Schlyter 2013). At independence, Uzbek's raised status led to Russian emigration, although Russian continued to be used as a technical/academic/administrative language (Aref'ev 2012). Uzbekistan had many schools with non-Uzbek LOI in 2010: Russian, 760 (93 Russian-only); Kazakh, 522; Karakalpak, 383; Tajik, 258; Kyrgyz, 61, and Turkmen, 48, and a few classes with other LOIs, although Tajik-medium schools seem few relative to the Tajik population (Aref'ev 2012; Finke and Sancak 2012; Landau and Kellner-Heinkele 2012; Schlyter 2011, 2013).

Local research was published in English after independence documenting plurilingualism and interethnic communication. Baskakov and Džuraev (1996) find Tajik-Uzbek bilingualism, some Russian-Uzbek and Russian-Tajik bilingualism among Russians, as well as Korean-Uzbek-Russian trilingualism among rural Koreans,⁶ reporting also Kazakh-Uzbek bilingualism and Kazakhized and Turkmenized varieties of Uzbek. Nasyrova (1996) studied the Karakalpakstan province, looking at residents' proficiency in their "native language," Russian, and the local official language, Karakalpak, finding asymmetrical, and two-way, bilingualism.⁷ More recently an ethnographic study in rural Bukhara province (Finke and Sancak 2012) found Tajik-Uzbek bilingualism a key component of local identity prized by Tajik- and Uzbek-dominant individuals alike, with many families using two languages in the home. Tajik language retains high status and is regarded in some respects as superior to Uzbek, although families have often requested conversion of Tajik-medium to Uzbek-medium schools (Finke and Sancak 2012).

Turaeva (2013) studied the language practices of speakers of Turkmenized Uzbek dialect in the capital city, where Tashkent vernacular and literary Uzbek predominate, noting their difficulties with standard Uzbek and the conflict between using standard language to be understood and avoid stigmatization and using their

⁶Some Tajik-Russian cognate pairs, for example *zan*, *žená*, "woman"; *zamin*, *zemlyá*, "land, earth"; *bud*, *bud'*, "was/be!" etc., are quite transparent and may aid learning of Tajik by Russian speakers.

⁷The Turkic languages covered include three languages from the Northwestern Turkic, Kypchak, family that resemble each other closely: Kazakh, Karakalpak, and Tatar; while Southeastern, Karluk, Turkic is represented by Uzbek, and Southwestern, Oghuz, Turkic is represented by Turkmen. For more on Turkic languages, see Lars Johanson & Éva Á. Csató (eds.), (1998), *The Turkic languages*. London/New York: Routledge.

language to maintain their local identity.⁸ Similarly, Tajik speakers proficient in Uzbek and Russian prefer to use Russian rather than Uzbek in the capital city (Dilia Hasanova, Nov. 18, 2014, personal communication).

Although reductions have occurred, schooling involving other LOIs is still provided. CERD (2006, p.4) encouraged greater consultation with minority communities and provision of adequate quantity and quality of textbooks and teaching materials in these languages.

In 2010, ethnic Russians made up only 2.5 % of the population, with 40 % of citizens relatively proficient in Russian (20–25 % in rural areas). Russian LOI was provided in 7.1 % of schools and for 4.3 % of students in 2010, while 580 of the 700 schools with Russian LOI in 2010/2011 were bilingual (Uzbek-Russian) or trilingual (Uzbek-Karakalpak-Russian). Russian is studied 2 h weekly in schools with non-Russian LOI, but sometimes less, and in rural schools, not at all, due to lack of teachers. Russian-medium higher education programs had 9.1 % of students in 2010/2011, while Russian LOI remains the norm in medical, technical, and professional programs, and Russian proficiency of Uzbek bilinguals is inadequate for quality teaching (Aref'ev 2012, pp. 120–126).

Hasanova (2007) has documented the rising demand for English as a sign of modernity and the challenges of teaching and learning it as a school subject in state schools. Elite immersion education in English alongside international students is available in Tashkent in private international schools for students whose families can afford to pay the high tuition fees. At these schools supplementary instruction in Russian and less often Uzbek is available. One such school had 112 Uzbekistani students out of a total of 480, including 47 US citizens and 321 students from other countries (Tashkent International School 2016).

Thus, while there have been reductions in minority language school programs, Uzbekistan retains an extensive network of parallel-medium schools alongside Uzbek-medium schools in minority areas where teachers may also engage in informal mixed minority-Uzbek bilingual education as well as multilingual Uzbek-Russian-English education in private schools.

Language and Education in Tajikistan

After Turkmenistan, contemporary Tajikistan has the highest titular population and the lowest ethnic Russian population in the region. Its population in 2010 included

⁸Discussion of specific features of this Turkic variety that distinguish it from standard Uzbek is not controversial. The classification of this variety is varied: Turaeva names it *Khwarezmian Uzbek* for its region, Khwarezm, on the border with Turkmenistan, and site of the pre-Soviet Khiva emirate; some have called it Oghuz Uzbek, i.e., Uzbek with SW Turkic features, see E. Dobos: 1974, An Oghuz dialect of Uzbek spoken in Urgench, *Acta Orientalia Academiae Scientiarum Hungaricae*, 28, 1, 75–97. It is not clear how this Turkmen-like variety of Uzbek compares to the “native language” of ethnic Turkmen in Nasyrova’s study of Karakalpakistan, which may be a rather Uzbekized or Kazakhized variety of Turkmen.

ethnic Tajiks (84.3 %), Uzbeks and related Turkic tribal groups (13.4 %), Kyrgyz (0.8 %), Russians (0.5 %), and Tatars (0.1 %) (see Table 1), with 84 % claiming Tajik as a native and 8 % as a second language, with 26 % claiming Russian as a native or second language and 39 % claiming to be bilingual (Tajikistan 2012, pp. 48, 58). Post-independence language policy has focused on making Tajik the sole state language, an aim supported by literary Tajik's continuity with classical Persian, while retaining an intermediate special status for Russian as "language of interethnic communication." The new Law on Language in 2009 requires all citizens to know the State Language, Tajik, while granting all nationalities the right to freely use their own language and removing Russian's status as "Language of Inter-ethnic Communication," while permitting other ethnicities' languages as LOIs in areas of compact settlement.

In 2009, of 3,775 schools, 2,608 (69 %) had Tajik-only LOI, while 1,167 (31 %) had another or multiple LOIs: 1,024 with Uzbek LOI (351 monolingual, 673 mixed), 247 Russian (15 monolingual, 232 mixed), 66 Kyrgyz (36 monolingual, 30 mixed), 7 Turkmen (1 monolingual, 6 mixed), and 2 English medium (1 monolingual, 1 mixed). Moreover, there are 20 Tajik-Russian-Uzbek, 1 Tajik-Russian-Kyrgyz, 1 Tajik-Russian-Turkmen, and two Tajik-Russian-English schools (CERD 2011; Landau and Kellner-Heinkele 2012; Schlyter 2013), while the LOI of a school for Afghanistani refugee children is Dari, Afghanistani Tajik/Persian written in Perso-Arabic script (CERD 2011). The Republic of Tajikistan has officially committed to supporting learning of the state language, Russian and English, and languages of minority nationalities, as well as providing support for languages of East Iranian sub-ethnicities. Nevertheless, educational funding and policy implementation have focused more on developing new Tajik language curricula and textbooks than on their equivalents in other languages and has not gone beyond parallel-medium schooling to experiment with stronger forms of bi-/multilingual education.

Language legislation does not support use of endangered Eastern Iranian languages as LOIs nor do official statistics count their speakers since they are considered ethnic Tajiks, despite mutual unintelligibility of East Iranian languages and Tajik. Research noted problems with Tajik LOI for East Iranian Pamiri language students with some teachers compensating with supplementary L1 instruction, creating de facto mixed-medium bilingual education (Niyozov 2001). Consequently, Bahry (2005) argued for bilingual education as a means to support achievement and L2 Tajik development of Pamiri speakers. Olimnazarova (2012) studied university EFL classes in a Pamiri district finding translanguaging ubiquitous among plurilingual teachers and students (Shughni, Tajik, Russian, and English languages) and argued that this local practice was justified by contemporary theory.

Despite the greater emphasis by the government on Tajik language curriculum and materials development, there is little research on L1 or L2 Tajik literacy amid a remarkable amount of research that examines language shift from Pamiri languages to Tajik and possible countermeasures including the use of Pamiri languages as LOIs (Elnazarov 2010). This theme was highlighted at a recent international conference on endangered languages held in Tajikistan's Mountainous-Badakhshan Autonomous Province (MBAP), where Pamiri languages are spoken (Elnazarov and Ostler 2010).

Surveys of smaller language groups found language vitality and positive attitudes toward vernacular literacy, despite lack of formal use as LOI (Clifton 2005). Clifton (2010) argued that MBAP's multilingualism was stable, due to vernacular-based identity and complementary language niches, while Bahry (2015b) applies bilingualism, diglossia, and language hierarchy to MBAP's language ecology, finding stability of some languages, retreat of others, and advancement of Tajik and Shughni.

CERD's response to the Republic of Tajikistan's submission recommended more education "in or of minority languages, according to the needs and wishes of persons belonging to such groups" (CERD 2012, p. 5). The challenges of Uzbek and Kyrgyz education in Tajikistan have been noted, including transfer to Tajik-medium schools due to insufficiency and inadequate minority language teaching materials (Fierman 2011; Karabaev 2011; Niyozov 2001). Soviet era textbooks have worn out and/or been rejected due to inappropriate Soviet era content. Meanwhile new Tajik as a second language textbook has been developed with Russian and Uzbek, but no Kyrgyz glossaries; as a result, Kyrgyz-speaking children in Tajikistan were unable to understand the new textbooks (Karabaev 2011).

Nagzibekova (2008) discussed Russian's continued *de facto* status, due to its continued use in Tajikistan in political, economic, academic, cultural, and military domains. Nevertheless, by 2010 there was strong Russian proficiency among only 13 % of the population and Russian-medium enrolment of only 2.8 % of students (pp. 135–137). Alongside continued debate about the importance of Russian language education in Tajikistan's public schools, private and elite public "gymnasium" and "lycée" schools emphasize prestigious international languages, mainly English. For example, one private international school in Dushanbe⁹ enrolling international and local students has an international curriculum with English LOI, supplemented with some Tajik language and curriculum for local students. As in Uzbekistan, Tajikistan has many parallel-medium schools and bilingual teachers who organize informal minority language instruction in Tajik-medium programs, as well as elite schools offering trilingual Tajik-Russian-English education, such as the international school in MBAP¹⁰ which teaches a combined international and Tajik curriculum with Tajik, Russian, and English LOIs, which is also likely supplemented informally by Pamiri LOI. Despite the popularity of these private initiatives, the state has heretofore never formally considered bi-/multilingual education in its schools as a solution to the language dilemmas of Tajikistan society and education. Thus, it is interesting, and perhaps significant, that in December 2014, Tajikistan acted as official host for a series of seminars organized by OSCE on preconditions for successful development of multilingual and multicultural education that will be discussed as an effective means of learning the state language, preservation of language diversity, and integration of multiethnic society.

⁹Dushanbe International School, <http://dis.tj/>.

¹⁰The Aga Khan Lycée, Khorog, MBAP <http://www.agakhanschools.org/tajikistan/>.

Language and Education in Kyrgyzstan

Kyrgyzstan also faces the challenge of raising titular language proficiency among Russian-dominant urban Kyrgyz, while also developing Russian proficiency among the general population. The Russian minority is much larger than in Turkmenistan, Uzbekistan, and Tajikistan, and in the capital city, many elite Kyrgyz are Russian dominant or have shifted to Russian, while Uzbeks, the largest minority, are concentrated in southern Osh province, which has twice seen interethnic conflict since independence. Accordingly, bilingual Kyrgyz-Russian education and trilingual Kyrgyz-Uzbek-Russian education have been experimented with, and multicultural, multilingual education is currently discussed as a broader policy option (CERD 2012). In 2011, Kyrgyzstan's population was composed of ethnic Kyrgyz (72 %), Uzbeks (14 %), Russians (7 %), Dungan Muslim Chinese (1 %), Uighurs (1 %), and 4 % of other origin (CERD 2012, p. 8). In 2009, strong proficiency in Kyrgyz was claimed by 76.4 % of the population, with 37.5 % claiming proficiency in Russian and 18 % in Uzbek (Aref'ev 2012, pp. 98–99). In 2010/2011, 60.7 % of students were enrolled in Kyrgyz-medium, 27.3 % in Russian-medium, and 11.7 % in Uzbek-medium programs (Aref'ev 2012, p. 103). In 2009–2010, there were 1,379 Kyrgyz-medium schools, 162 Russian-medium schools, 137 Uzbek-medium schools, and seven Tajik-medium schools, besides 449 “mixed” schools with two or more LOIs (Akhunjan Abdrashev, state secretary of Ministry of Education and Science, personal communication, July 8, 2010). In 2011, mixed schools including Kyrgyz-Russian, Kyrgyz-Uzbek, and three-language Kyrgyz-Russian-Uzbek schools made up 19.7 % of all schools (CERD 2012).

Korth's qualitative study (2005) on attitudes towards language and schooling found that negative attitudes towards Kyrgyz among Russophones and minorities persist, with second-language teaching of Kyrgyz seen by many as ineffective and anachronistic. Huskey argues that Kyrgyzstan's bilingualism is diglossic, with urban Kyrgyz using Russian as a public “high language” and Kyrgyz as a private “low language” (Huskey 1995, p. 552).

A survey of state employees found language preferences for communication with clients included Kyrgyz only (44 %), mostly Kyrgyz (13 %), mostly Russian (37 %), and Russian only (22 %), with some never using Russian (2 %) or Kyrgyz (8 %) (Grigorieva and Parmanasova 2007, pp. 56–59, in Orusbaev et al. 2008, p. 487). Such research is interpreted by Orusbaev et al. as indicating inadequacy of Kyrgyz as an administrative language but also reveals readiness of many Kyrgyzstanis to function bilingually according to need. Results on a national university entrance examination show an effect of language of testing with candidates' results: the mean score of those tested in Russian was 133.2, in Kyrgyz 104.4, and in Uzbek 100.6 (Shamatov et al. 2014).

Kyrgyzstan's attempts to treat ethnic groups more equally after the 1990 Uzbek-Kyrgyz conflict in Osh province were commended by the UN's CERD (2001). However, the resulting dual-language bilingual schools are now inactive. In 2004–2005, most Uzbek students were in Uzbek-medium schools, yet despite claims of high mutual intelligibility between local Kyrgyz and Uzbek dialects, Kyrgyz

teachers called upon to teach in Uzbek programs had difficulty teaching in standard Uzbek language (Fierman 2011). Nevertheless, in 2008, the government produced a framework and guidelines for developing multicultural, multilingual education (CERD 2012, Sections 165–171, pp. 27–28).

Moreover, an international forum “Dialogue of sides, Language policy in the education system of Kyrgyz Republic” in 2012, attended by representatives of government, nongovernment, international organizations, and experts, featured presentations and discussion on Kyrgyz as a state language, Russian as an official language and regional lingua franca, and English for international communication. There was also discussion of minority language education: teaching Kyrgyz language to non-Kyrgyz and teaching Russian for labor migration. Interestingly, a Kyrgyzstan language expert found 67 % of surveyed teachers in Kyrgyzstan’s southern region are ready to teach bilingually (Duishon Shamatov, field notes, November 27th, 2012). While previous experiments in Kyrgyzstan on bilingual and trilingual education were sponsored by a small international NGO, CIMERA, and a Kyrgyzstan counterpart NGO, Til-Dil (*language* in Kyrgyz and Uzbek), it is significant that representatives of Kyrgyzstan’s Ministry of Education presented on Kyrgyzstan’s experiments with bi-/multilingual education which played a major part at the recent regional conference on Multilingual Education in Central Asia in Tajikistan in December 2014.

Language and Education in Kazakhstan

The challenge for language-in-education policy in Kazakhstan is to balance developing Russian-language proficiency among the rural Kazakh population and Kazakh proficiency among Russian-dominant urban Kazakhs, learning of minority nationalities’ mother tongues and satisfying general demand for learning English as a foreign language. As a result, prospects for bi-/multilingual education are high in Kazakhstan: policy and public demand favors it and research capacity in support of plurilingualism is highest in the region. Ethnic Kazakhs, a minority in 1989, and a bare majority in 1999, had reached 60 % of the population by 2008, with the share of Russians, the largest minority, falling to 25 % and reaching 3 % for Uzbeks, 1.5 % for Uighurs, and 10.5 % for others (Table 1). In 2011/2012, the share of the population claiming proficiency in Kazakh was 62 % and in Russian 85 %, with 63 % of enrolments in Kazakh- and 33 % in Russian-medium schools. Two-language parallel-medium schools with Russian alongside Kazakh, Tajik, Uzbek, or Kyrgyz LOI and some three-language schools existed (Aref’ev 2012, pp. 135–137). In Kazakhstan, Kazakh, Russian, Uyghur, Uzbek, and Tajik are LOIs, and many local languages are school subjects. Work on development and implementation of multicultural trilingual Kazakh-Russian-English education was scheduled from 2001 to 2010 (Landau and Kellner-Heinkele 2012).

Research emphasizes Kazakh status development and continued Russian use in high status domains such as education (Fierman 2009; Smagulova 2008, 2015). Smagulova’s countrywide survey of Kazakh and Russian language use and attitudes

(2008) found increased Kazakh proficiency and somewhat reduced Russian ability among Kazakhs, at the same time as the proportion of Kazakh-medium and parallel Kazakh-Russian-medium schools has increased. Most respondents preferred some form of bi-/multilingual for their children or grandchildren (60 % of Kazakhs, 65 % of other Turkic ethnicities, and 70 % of Russians surveyed), with Kazakh-Russian-English trilingual education the most popular.

Education in minority LOIs was available in 2009/2010 in 58 Uzbek, 14 Uyghur, and 2 Tajik schools, with South Korea also supporting Korean study. Trilingualism is frequent among Turkic-speaking minorities, with 81 % and 97 %, respectively, of Uzbeks and Uyghurs reporting L1 proficiency, Kazakh (81 % and 80 %), and Russian (76 % and 59 %) (Aref'ev 2012, p. 88), while Uzbek-medium minority education is said to be of better quality in Kazakhstan than in Tajikistan (Fierman 2011).

The United Nations CERD recommended that Kazakhstan offers greater minority participation in language policy formation (CERD 2010, April 6). Likewise, the Organization for Security and Co-operation in Europe (OSCE) supports experimental bilingual education for Kazakhstan's Uzbeks.¹¹ OSCE hopes the government will take over its "rudimentary" bilingual programs in Uzbek and Russian and extend them to more schools (Personal communication. Dmitri Alechkevitch, advisor to OSCE High Commissioner on National Minorities, June 2006). CERD praised Kazakhstan's support of minority language use and learning but recommended more attention to the quality of minority language schools, staff, and teaching materials and better access to higher education (CERD 2010, April 6, pp. 2–3).

Kazakhstan aims to develop a trilingual society by 2020 with 95 % of the population proficient in Kazakh, 90 % in Russian, and 20 % in English (Kazakhstan 2050 n.d.) through trilingual education (Mehisto et al. 2014). Currently there are 16 Nazarbayev Intellectual schools whose linguistic goals are to develop Kazakh, maintain Russian, and introduce English proficiency using a CLIL approach, stating language proficiency expectations in terms of Common European Framework of Reference for Languages (CEFR) bands (NIS n.d.). Mehisto et al. (2014) outline the need to further understand trilingual pedagogies and to learn from successful instances elsewhere of multilingual education. Several chapters in a forthcoming volume on language change in Central Asia focus on aspects of Kazakhstan's trilingualism policy: everyday language use (Landis 2015), Kazakh-language corpus building (Shegebayev 2015), and language attitudes (Smagulova 2015). Kazakhstan also was a significant participant in regional seminars in Tajikistan December 2014 on multicultural education focusing on presenting to representatives from Kyrgyzstan and Tajikistan concerning its experience in developing and implementing trilingual education in this country.

¹¹OSCE support for bilingual education depends on sociopolitical circumstances. As OSCE's primary mandate is conflict prevention, its policy is to promote bilingual education as a means to reduce interethnic tensions, particularly when the affected ethnicity is a majority in a neighboring state. Personal communication. Dmitri Alechkevitch, political advisor to OSCE High Commissioner on National Minorities, Rolf Ekeus. June 2006.

Problems and Difficulties

There is enormous potential for various forms of bilingual, trilingual, and multilingual education in a region already as plurilingual as Central Asia. This is indicated by reports of teachers who implement more flexible bilingual pedagogy where submersion education is supposed to go on. This is also indicated by the popularity and success of international schools less constrained by the strict national policy aimed at promotion of each republic's state language. A final indication is Kazakhstan's policy of development and implementation of trilingual education.

Nevertheless, there are important challenges to the implementation of planned programs and to the extension of bilingual or multilingual education to the whole education system.

International schools are geared towards the marketplace and work with existing perceptions of hierarchical language status offering languages of instruction in a ranked order: offering English, English and Russian, or English, Russian, and the titular language. In the case of international language schools organized by Turkish companies, Turkish is added to the list, after English and before the titular language. Along with the hierarchization of languages come strong curriculum hierarchies such that higher status subjects are taught in higher status languages, with Central Asian languages used as LOIs for non-universal knowledge, local history, local literature, and local geography, while universal subjects are taught in higher status languages. Note that this applies to relatively high status languages as well: Turkish employees of a Turkish international school teach science and mathematics in English, not Turkish, while Kazakhstan's trilingual schools will teach these subjects in English, not Russian.

In Kazakhstan's case, the attractiveness of English-medium instruction may avoid the previous either-or choice of all-Kazakh or all-Russian instruction by serving to draw Russophones (whether titular or Russian) into partial Kazakh-medium education where academic proficiency in the titular language is developed. In this sense, they can support state policy of extending Kazakh proficiency among all citizens. Note, however, that Kazakh-medium courses are largely in the humanities: history, geography, language, and literature. There is some likelihood of reduction of dependency on Russian language for high status subjects but also the possibility of transfer of dependency in these domains to English. It is not clear what impact trilingual education as currently conceived will have on the goal of broad status and corpus development of Kazakh language into domains previously filled by the Russian language and/or Russified academic Kazakh. A further question is how Kazakhstan's trilingual education model might be adapted for mass titular language education in rural areas and whether and how to incorporate non-dominant languages of Kazakhstan's minority language groups into the model.

Beyond these system-internal questions is the question of whether other republics should or could adopt such a trilingual system or adapt a version of it as a means to deal with, or solve, their own language and education challenges. Kyrgyzstan is at the discussion and planning stage and will be closely observing developments.

How to handle the internal balance between Kyrgyz and Russian, as well as whether or how to incorporate the Uzbek language, is an important question.

The place of Russian and the titular language is an important question for other republics, although those with smaller Russophone populations and more success in spreading the use of their titular languages might use the titular language as LOI for a greater portion of the curriculum than Russian. Of course for all remaining republics whether and how to incorporate neighboring titular languages and smaller unwritten languages is a major question.

There is a need for rigorous educational research, educational reform, curriculum development, policy formation, teacher education, and capacity development in much of the region. The Soviet Union left a legacy of dependency on external authority and research in post-Soviet Central Asian education and inadequate attention to sociolinguistic and applied linguistic research relevant to education, leaving information on language practices and learning within and outside schools. Take the example of the “mixed” parallel-medium schools. One could guess that despite the rigid language of language programs inherited from the Soviet model, there must be local innovation in bilingual and multilingual approaches to education. But these are underreported, under-researched, and have so far had little impact on national and regional level discussions. For example, virtually no research on language and preservice and in-service teacher education is available. As far as is known, the Soviet-style segregation of teacher education by language streams is maintained, although anecdotal reports suggest that some strongly bilingual teachers may participate in more than one language stream. At the same time, the former role of neighboring republics in preparing teachers to teach in their titular language in other republics has been disrupted. How teachers will be prepared for Kazakhstan’s trilingual education program is an important question: To what extent is teacher education for each language streams provided monolingually in parallel and to what extent bilingually or trilingually?

Future Developments

The linguistic and social complexity of the region of Central Asia and the disruptions to minority language education caused by the post-independence reductions in regional educational cooperation suggests the need for a broad ecological approach to language and education in the region that treats each language in relation to all other languages in the context. Governments can profitably share experiences with each other and the international research community to develop effective approaches to language and education, which should include bilingual and multilingual education.

Calls for dual-medium bilingual education as an improvement over existing second-language programs have been made for some time. During Perestroika, several scholars within the Soviet space proposed that students study with two media of instruction as an improvement over other inefficient methods (Jamshedov 1991). What is problematic in state schools for such proposals is the hierarchical

functional specialization of languages reminiscent of Soviet practice which does not concur with the current nation-building goals of any republic. To be acceptable, such proposals must support the titular language's status through its use as a medium of instruction in any field, not limited to transmitting *local* knowledge, and its use as a vehicular language in multilingual programs. Without these conditions bilingual programs may be perceived as vehicles for russification, turkicization, or anglicization.

Bilingual and multilingual education should not, however, be extensively introduced into Central Asia without sufficient preparation. There is a need to explore the existing parallel-medium schools and to see how they are using bilingualism in education and how they could be easily extended to pluri-medium programs by erasing their strict barriers between language programs and allowing students to take content courses in schools' existing LOIs, using something like the European Schools curriculum model that specifies courses by L1, L2, L3, and L4. Conferences with international participation have presented an opportunity for exchange of ideas. Some examples are the OSCE-sponsored conference "Multilingual Education and Mother Tongue Education for National Minorities in Kyrgyzstan" in Osh, Kyrgyzstan, and the British Council-sponsored Sixth International Conference on Language and Development in Tashkent, Uzbekistan. There have also been local conferences in Kyrgyzstan and in Kazakhstan. Most recently, the OSCE organized a trilateral conference in December 2014 among representatives of ministries of education in Kazakhstan, Kyrgyzstan, and Tajikistan aimed at sharing experiences and increasing regional collaboration in planning and implementation of multilingual education in the region indicates increased recognition of the potential for collaborative work in support of meeting the demands for multilingual education in Central Asia.

While this chapter has presented educational grounds for the bi- and multilingual education in Central Asia, and evidence that a *languages as resource* orientation that encourages plurilingualism and a both-and attitude towards languages rather than a monolingual either-or *language as right* or *language as problem* orientation is shared by much of Central Asia's population, the selection of language(s) of education and appropriate pedagogies does not occur in a vacuum. The prime attention of national policies has been to promote the titular language of the republic, treating the state language in effect as a right and other languages as problems in securing titular language rights. Some have commented that this monolingual focus of official policy in a multilingual region and the very different performance on tests of students in schools with different LOI may weaken social cohesion, with attendant economic and political costs (Silova et al. 2007; OSCE 2012).

At the same time governments and institutions of other countries are keen to promote the use of their languages in education in Central Asia. There is in the region a strong demand for the study of English and the use of English as a language of instruction. Nevertheless, this demand is partially satisfied by the activity of external governments and NGOs of English-speaking countries such as the US embassies and Peace Corps volunteers and the British Council. There is also demand for languages of other external states in education, particularly Turkish, although non-state educational organizations, have played the main role in providing Turkish

teachers and education in Turkish in private schools. The Chinese government is directly supporting the expansion of Chinese language teaching in Central Asia through the opening of Confucius Institutes and other study centers in Kazakhstan, Kyrgyzstan and Uzbekistan.

Some Central Asian minorities, such as Central Asia's Korean community, have benefitted from external support by external governments for the learning of their language. The report published by Russian Federation's Ministry of Education and Science on the state and status of the Russian language in neighboring countries, and its concern that Russian is being replaced as a language of higher education and professional training in Central Asia is an index of continued interest of Russia in maintenance of its language high status in this region.

The Organization for Security and Co-operation in Europe (OSCE) has shown an interest in language rights of minority language groups particularly as a source of strain on security, especially when one state's minority language is a neighboring state's titular language. Its "Ljubljana Guidelines on the Integration of Diverse Societies" state for example that:

In order to build and sustain just, stable and peaceful democracies it is necessary to recognize the distinct characteristics of groups, while also acknowledging the heterogeneity and fluidity within those groups. Societies are enriched by diversity and the resulting pluralism if and when relations among groups (minority and majority) as well as between groups and the authorities are based on trust and mutual respect and co-operative interaction and active engagement. Intra-community and cross-community links should be encouraged, as they strengthen the cohesion of societies, decrease tensions and prevent the risk of conflict. . . . In multilingual societies, a balanced and inclusive education system should combine tuition in the State and official language(s) with adequate opportunities for pupils to learn their minority language or receive instruction in this language. Multilingual education adds value for pupils of all communities and society at large and should be encouraged for minorities and majorities alike. (OSCE 2012, pp. 12, 56)

The OSCE's High Commissioner for National Minorities has recently visited Central Asia and recommended the application in this region of the "The Ljubljana Guidelines," making particular reference to minority languages and education, praising for example the provision of Uighur and Uzbek-medium education in Kazakhstan, the reinstatement of Uzbek-language university entrance examinations and the plan to introduce multilingual education in Kyrgyzstan, while urging Tajikistan to provide more support for education and offer university entrance examinations in minority languages, while offering some financial support towards the development of multilingual education in that country (OSCE 2014, pp. 7–8).

Multilingual education initiatives in the region may also provide a means whereby minority language communities, particularly Russian speakers, can learn the state language of their republic while maintaining their own language, and also have the opportunity to learn an international language, which may meet the political concern of Central Asian governments to allay potential causes of separatism, and guard against accusations from neighbors of language discrimination. Thus, despite

the earlier monolingual emphasis of internal and external policy actors, the space for personal plurilingualism and societal multilingualism with a language as resource orientation in education is increasingly evident.

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Cross-References

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Bilingual Education in the Middle East and North Africa

Zeena Zakharia

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Abstract

Bilingual education in the Middle East and North Africa (MENA) has a rich and contested history. Yet related research and publication in English is relatively new. This chapter synthesizes key literature published in English to provide an overview of bilingual education in MENA. Encompassing a number of languages and a variety of school models, bilingual education in the Maghreb, Mashreq, and Gulf states has evolved from different historical periods and sociopolitical, cultural, and economic circumstances. This chapter focuses on bilingual education as those “officially” sanctioned forms of schooling that engage Arabic alongside at least one other language, generally an “elite,” “western,” “foreign” language emerging from colonial or contemporary contact, rather than historically minoritized languages. Through selected cases, it serves to highlight commitment to various forms of bilingual education across the region, with varying success and support.

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Introduction

Bilingual education in the Middle East and North Africa (MENA) has a rich and contested history. Yet related research and publication in English is relatively new. This chapter synthesizes key literature published in English to provide an overview of bilingual education in MENA. Encompassing a number of languages and a variety of school models, both public and private, bilingual education in the Maghreb, Mashreq, and Gulf states has evolved from different historical periods and sociopolitical, cultural, and economic circumstances.

This chapter focuses on bilingual education as those “officially” sanctioned forms of schooling that engage Arabic alongside at least one other language, generally an “elite,” “western,” “foreign” language emerging from colonial or contemporary contact, rather than historically minoritized languages, such as Aramaic, Armenian, Berber/Tamazight, or Kurdish (see e.g., Errihani 2006 on Tamazight; Hassanpour 2012 on Kurdish). Through selected cases, it serves to highlight commitment to various forms of bilingual education across the region arising from different historical, social, and developmental realities, and with varying success and support. Bilingual education through community-based schools, family arrangements, religious institutions, and other nonformal spaces also serves to maintain minoritized languages alongside official Arabo-nationalist agendas. However, because of a limitation of sources, discussion of these efforts is not included here. Furthermore, the situation of Arabic bilingual education in Israel, which has a substantial literature, is not discussed (e.g., Amara and Mar’i 2002; Bekerman 2009; Feuerverger 2001).

Early Developments

All education in Arabic could be considered bilingual or at least bi-dialectal, given the diglossic situation in which Classical and Modern Standard Arabic are used formally to teach curricular subjects, and localized spoken varieties are used in nonformal communication both in and out of the classroom. However, educators generally take Arabic diglossia for granted, despite the difficulties of teaching Arabic literacy and content knowledge in a “high status” variety of Arabic that is nobody’s home language. Thus, while much has been written about Arabic diglossia, language varieties, and contact, this literature generally has not been conceptualized in the domain of bilingual education (see e.g., Ferguson 1959; Altoma 1969; Zughoul 1980 on Arabic diglossia; Versteegh 1997/2014 for a comprehensive overview of studies on Arabic varieties, diglossia, and bilingualism, including historical and contemporary developments; Bassiouney 2009 for a discussion of various aspects of Arabic sociolinguistics; Haeri 2003 for a linguistic ethnography of Arabic diglossia in social and political context). Rather, research with an explicit focus on bilingual education has tended to focus on schooling in Arabic and at least one other language of wider communication, often an “elite,” “foreign” language, such as French or English.

Historical, archival, and descriptive literature on bilingual education and language-in-education planning in MENA ties bilingual education to the first emergence of colonial and missionary schools during the first half of the nineteenth century. While an older history of education across languages, in the form of religious, cultural, legal, and scientific scholarship and exchange, is well documented, the advent of the “modern” school serves as the direct antecedent to contemporary forms of bilingual education. According to archival and missionary records, school languages in the region included Arabic, Armenian, English, French, German, Greek, Hebrew, Italian, Latin, Russian, Spanish, Turkish, and other languages, often guided by the language of the sponsoring religious community.

Fueled by various eastern and western European, Ottoman, and American political and social interests, the use of multiple languages in formal schooling served to establish spheres of influence and to differentiate local populations (Shaaban and Ghaith 1999). This influence became more direct after World War I, with the carving up of the Ottoman Empire largely into British and French mandates and protectorates. In the Maghreb, for example, the French, Italian, and Spanish languages gained preeminence, while in the Mashreq, French and English spread in line with the language of the colonial power. After World War II, a policy of Arabization in education spread throughout the region, under the banner of Arab nationalism, as Arab states gained independence (Benrabah 2007). This process was simultaneously immersed in debates about nationalism, western imperialism, pan-Arabism, and pan-Islamism (Boutieri 2012; Suleiman 1994, 2003; Zakharia 2009).

As new countries on the Persian or Arabian Gulf established formal systems of schooling, in the latter half of the twentieth century, they integrated the teaching of English into their development plans (Brewer and Goldman 2010). This occurred in part because of an influx of diverse peoples from around the world during the oil boom and the rapid industrialization and urbanization that followed, in part because of British and American influence in the Gulf region, and as an outgrowth of neoliberal reform and workforce imperatives (Karmani 2005).

Thus, bilingual education in the various subregions of MENA developed from different circumstances and historical periods, some as recent as the last decade.

Major Contributions

Discussions about bilingual education and language-in-education policy in MENA reflect tensions between, on the one hand, the articulated value of national identity and cultural “authenticity” (through Arabic and, in some cases, other local languages), and on the other, claims of progress (presumably through English and/or French) (Marley 2004; Zakharia 2009). These interact with competing pedagogical visions for the school and in relation to the job market and processes of national development, increasingly in line with neoliberal imperatives (Boutieri 2012). Bilingual education, though contested (e.g., Benrabah 2007) and fraught with challenges (e.g., Bahous et al. 2011), has emerged as an expression of political ideology, and

understanding its opposition requires a historical perspective (Benrabah 2007) and insight into contemporary conflict and social change in the region.

Still bilingualism is highly valued for a variety of reasons, although it is not equally enjoyed by all students (Benrabah 2007; Marley 2004; Zakharia 2009). Most MENA students who finish government schooling have been exposed to instruction in Arabic and at least some English and/or French, to varying degrees. In addition, minority languages such as Berber, Kurdish, Armenian, and Aramaic continue to be taught through community-run schools, and in some cases government schools, although these languages have not held the same status in national and post-independence educational projects (Boutieri 2012).

The Maghreb, including Morocco, Algeria, and Tunisia, share a similar sociolinguistic history in which Arabic was introduced during the eighth- and ninth-century Islamic conquest and French, Italian, and Spanish were introduced with European colonization in the nineteenth century. While a significant portion of the populations speaks indigenous Berber languages, also known as the Amazigh languages and collectively as Tamazight, these languages are not generally used in school. After independence from colonial rule in the latter half of the twentieth century, a policy of Arabization established Arabic as the sole official language in these three new states; however, French continued to dominate nonreligious areas of public life as the unofficial second language.

Consequently, bilingual education in Morocco has been characterized by contradictory attitudes toward language policy (Ennaji 2005; Marley 2004) and a heterogeneity of language systems that compete for prestige, functionality, and curricular space, including different varieties of Arabic, Tamazight, French, Spanish, and English (Ezzaki 2007). While Arabic is officially the main language of instruction, national education reforms introduced in 2002 designated French as the first foreign language and English as the second foreign language. In practice, students study the humanities and social sciences in Arabic, while mathematics and sciences are generally taught in French. Furthermore, in 2004, Tamazight was introduced as a subject into primary schools in rural areas (Errihani 2006; Ezzaki 2007).

Tunisia follows a similar bilingual structure, with children beginning school in Arabic then being formally introduced to French in Grade 2 and English in Grade 6 (Daoud 2011). Despite sustained efforts to Arabize the curriculum across the educational span, French continues to be the language of instruction for secondary school mathematics, sciences, and economics, as well as vocational training. The persistence of French despite Arabization efforts reflects an “ongoing ideological and sociocultural rivalry between Arabic and French” (Daoud 2011, p. 9) that precedes Tunisian independence from France. Ambivalent language policy and planning by the postindependence Tunisian elite led to the promotion of Arabic as the anchor of Tunisian Arabo-Islamic identity, or Tunisification, vis-à-vis colonial France, and the advancement of French for access to scientific knowledge and modernity. These reflect unresolved tensions in the Arabic-French bilingual model, in which French is considered by some to be a threat to Tunisian identity, at the same time that it is challenged by English in its functional role toward employability and scientific progress in the contemporary period.

Arabization in Algeria has similarly been the subject of tremendous debate (Benrabah 2007). Efforts to Arabize curriculum and faculty began in the 1960s in direct response to colonialism, replacing French with Arabic as the language of instruction from the primary level. The exclusively Arabic monolingual vision for schooling was inspired by the nineteenth-century European ideal of nationalist and linguistic convergence. The symbolic value of Arabic as the language of liberation, as well as Islamic culture and religion, made it the embodiment of colonial resistance (Benrabah 2007). However, as Benrabah (2007) argues, the hegemony of linguistic Arabization overlooked a historically linguistically pluralistic society, leading to the maintenance of the very languages it targeted for elimination, namely, French, Tamazight, and Algerian Arabic. Today all subjects in school are taught in Arabic except for foreign languages, including French and English. After an extensive political struggle, Tamazight was allowed as a subject at the middle school level in 2003 (Benrabah 2007).

Bilingual education in the Mashreq, including Egypt, Lebanon, Jordan, Syria, Palestine, and Iraq emerged from a different sociopolitical context. Under centuries of Ottoman occupation, culminating in European and American missionary activity in education during the nineteenth century, and French and British control after World War I, the region was historically exposed to multiple languages in schools. After independence, the countries of this region integrated the remaining missionary and colonial languages into their school systems, particularly in the private sector, with the exception of Syria, which developed a monolingual Arabic policy after independence from France.

For example, in nineteenth-century Lebanon, bilingual educational practices developed along the lines of their European and American missionary sponsors (Shaaban and Ghaith 1999), thus spreading along sectarian lines during the late Ottoman period and prior to World War I (Frayha 2004). During this period, schools operated in Arabic and the language of the mission, such as French, English, German, Greek, and Russian, thus establishing a tradition of bilingual schooling. However, the role of these languages in education remained the subject of intense public debate (Sbaiti 2010), claiming the use of French and English to be “expressions of ‘cultural colonisation’” (Frayha 2004, p. 173) and implicating formal schooling in religious inequality and sectarian struggle (Zakharia 2009).

Under French mandate Lebanon (1920–1943), French authorities established Arabic and French as official languages, imposed the French educational system, and encouraged the establishment of private French schools and French missionary institutions. Enduring tensions over language policy in education from this period reflect on the one hand the centrality of language to national and cultural identity and claims to self-determination, and on the other, schools’ struggles for pedagogical autonomy over languages of instruction (Sbaiti 2010). Language debates in education were and continue to be “driven by competing political and religious sentiments, perceptions of cultural (and even civilizational) identity, as well as by personal and familial considerations” (Sbaiti 2010, p. 59).

After independence (1943), Arabic was made the sole official language in Lebanon; however, French continued to dominate private institutions and public

life because of its embeddedness within social, political, and economic institutions and its entrenchment among the educated and governing elite who were largely schooled in French missionary institutions. In 1946 English was officially introduced as an alternative foreign language option to French in schools, reflecting its historical presence in missionary schools and its status as the language of the American universities in Beirut. While all subjects were to be taught in Arabic in Grades 1–6, students could sit for government examinations in mathematics and sciences in Arabic, English, or French.

Based on this legacy, the contemporary national curriculum, which governs public and private schools, operates in Arabic, French, and English for all students, in different combinations. Arabic and either French or English are introduced from the primary grades, and the second foreign language (English/French) is introduced from Grade 7. In practice, many private schools, which in 2013 accounted for 70 % of students, introduce the second foreign language as early as the primary grades, but with lesser weight. After the primary grades, half of the curriculum (humanities and social sciences) is taught in Arabic, and the other half (mathematics and sciences) is taught in the first foreign language (French or English). In addition, a number of private schools also teach in Armenian and other languages such as German and Italian. All schools, however, teach Arabic as the common denominator, while being in different degrees bilingual.

Iraq, as a historically multilingual nation with a strong tradition of Arabic language planning, provides an important case for understanding minority language issues. Article 4 of the new constitution of Iraq, ratified in 2005, states that Arabic and Kurdish are the two official languages of Iraq and guarantees the right of Iraqis to educate their children in their mother tongue, such as Turkomen, Syriac, and Armenian, in government schools (although the extent to which this has been achieved requires further examination). In addition, the British colonial legacy in Iraq left its imprint through English language education.

The case of Iraqi Kurdistan, in particular, provides important insights into recent debates regarding minority language rights (Sheyholislami 2009). In line with the Iraqi Constitution, the medium of instruction for Kurdish children in Iraqi Kurdistan is Kurdish, with English as a subject starting in the primary grades (Taylor and Skutnabb-Kangas 2009). Minority language speakers in Iraqi Kurdistan are reportedly taught in their languages as well, such as Assyrian/Syriac, Turkomen, and Arabic, with Kurdish and English as second languages and all languages offered as electives (Taylor and Skutnabb-Kangas 2009). Analysts have expressed concerns about the implications of this language policy for integration into a federated Iraq, in which Arabic is the *de facto* national working language (Raphaeli/Middle East Media Research Institute Middle East Economic Studies Program, 2006 as cited in Taylor and Skutnabb-Kangas 2009). Furthermore, while the Kurdistan Regional Government's (KRG) language-in-education policy is promising in its approach to language diversity and language rights, Sheyholislami (2009) argues that conservative nationalist state ideology remains a potential threat to both language diversity and rights, as well as Iraqi Kurdistan's nation-building project, namely, because

conservative Kurdish nationalists perceive linguistic diversity as a threat to the nation. In particular, while the KRG has respected the language rights of various minorities, they have been more reluctant in doing so for other language varieties that are considered to be Kurdish (Sheyholislami 2009).

The case of language-in-education planning in Iraqi Kurdistan deserves greater attention in the field of bilingual education as it provides an important case for understanding the opportunities for and challenges to promoting minority language rights in MENA. In particular, the US-led war on Iraq contributed to altering the language dynamics of the region; with the Baathist/Arab nationalist threat to Kurdish varieties no longer an issue, internal tensions between Kurdish language varieties have surfaced, with questions emerging regarding which variety of Kurdish shall be considered “official” and which others shall be suppressed (see Sheyholislami 2009 for a discussion). Pan-Kurdish nationalists (within and beyond Iraqi Kurdistan) have pointed out that while Sorani Kurdish speakers are the majority in Iraqi Kurdistan, they would not be the majority in a greater Kurdistan, arguing for a unified language based on all Kurdish varieties. These debates demonstrate the inextricability of language and politics and their impact on bilingual education policy, which remains understudied.

Bilingual education in the Gulf states, comprising the United Arab Emirates, Saudi Arabia, Qatar, Bahrain, Kuwait, and Oman, is relatively new, accompanying the establishment of formal systems of education and ministries of education in the 1970s, following the discovery of oil and rapid industrial development and urbanization that followed (Brewer and Goldman 2010). A large percentage of Gulf country residents are expatriate workers and their families, both from Arab and non-Arab countries. Thus school systems were established in a relatively short period to cater to the languages and cultures of diverse peoples. The spread of English in the Gulf states has been linked to the dynamics of oil, which sustains particular social and political conditions and serves the economic interests of English-speaking nations of the West (Karmani 2005).

Until recently, bilingual education in the United Arab Emirates (UAE) was primarily the domain of elite private and international schools, which enroll both national and expatriate populations. These schools, alongside private schools offering foreign language education and curricula specifically aligned with the school system of expatriate communities’ countries of origin (British, American, Indian, Pakistani, French, Russian, German, Iranian, etc.), account for over 40 % of the student population. Public, or free tuition government schools, on the other hand, teach all subjects in Arabic and introduce the English language as a subject from the primary grades.

The UAE educational development strategy by year 2020, however, entails a shift in language-in-education policy for public schools. Through public-private partnerships and model schools, the reform initiative entails the development of English language skills for elementary students, starting from Grade 1, with the goal of teaching mathematics and science subjects in English, and universal implementation by 2020. Furthermore, in 2013, following concerns about the development of the

Arabic language, the government announced a strategy toward reforming the Arabic language curriculum and teaching methods, starting with three model public schools and expanding to reach all public schools by 2017.

Similarly, Qatar is increasingly interested in having all children develop proficiency in English alongside Arabic, with mathematics and sciences taught in English (e.g., Brewer and Goldman 2010 for a discussion of these reforms). Research in primary schools reveals different models of bilingualism, ranging from a monoglossic approach that advocates strict separation of languages, to heteroglossic visions for schooling made evident through more flexible language practices (Al-Maadheed 2013). The emphasis on innovation and competition, toward building a knowledge economy, drives both the push for greater incorporation of English and the privatization of schooling (Asmi 2013).

Saudi Arabia's 10-year strategic plan for education (2004–2014) prioritizes the improvement of both the quality and quantity of English language teaching, alongside Arabic. In 2011, English instruction in all public schools was moved from Grade 7 down to the primary grades, with instruction starting in Grade 4 (e.g., Al-Seghayer 2005 for a discussion about English teaching in Saudi Arabia). As part of a vision for twenty-first-century learning, the commitment to English language teaching in public schools was reaffirmed in 2013. Like other Gulf states, the large number of expatriates working in Saudi Arabia has made English a lingua franca. The majority of foreign and international private schools, which cater to diverse expatriate groups, operate largely in English and offer other foreign languages and curricula. These include British, American, Indian, Pakistani, and Filipino schools. In addition, elite bilingual schools operate in French, German, and Japanese.

The body of literature on bilingual education in MENA illustrates a contemporary landscape emerging from diverse historical, sociopolitical, and economic circumstances. Because Arabic holds symbolic and functional significance in religious and secular discourse and has been central in defining the national self (Suleiman 1994), the issue of medium of instruction has been debated for much of the educational history of the region (Benrabah 2007; Boutieri 2012; Sbaiti 2010; Zakharia 2009). While Arabic is generally used as the vehicle for everyday expression and communication, foreign languages, namely, English, are increasingly needed for economic and technical domains, and educational planning reflects these imperatives.

Work in Progress

Bilingual education in MENA has been differentially experienced by children and youth in their schools. Social conflict, political violence, and inequality mediate this experience, against a backdrop of colonial legacies and Arabo-nationalist agendas in education, and contemporary global political and economic pressures that increasingly shape the educational experiences of youth. Observations from Lebanon, Algeria, Morocco, Tunisia, Egypt, and Qatar suggest that political conflict brings disputes about language policy and bilingual education into the public arena, creating a pull toward Arabic that is articulated in terms of patriotic ideals. At the

same time, conflict creates an impetus for youth to learn foreign languages as a pathway to security (Zakharia 2009). Thus, youth articulate seemingly contradictory or mixed attitudes toward languages (Ennaji 2005; Marley 2004), including both a strong connection to the Arabic language, as well as strong multilingual ideology during periods of national or regional sociopolitical conflict (Marley 2004; Zakharia 2009).

Furthermore, the Arabic language in national bilingual policy and local schooling practices has been linked to political and economic processes that alternately elevate and devalue the Arabic language in relation to other languages (Zakharia 2009). In Morocco, French colonial educational policies and post-independence national schooling ideologies create a system of double standards that emphasizes the Arabization of the national education system, yet privileges French-educated urban middle- and upper-class students, and discriminates against Arabized, largely rural students (Boum 2008). Similarly, the increased privileging of English in Qatar's schools serves to marginalize teachers and students of Arabic (Asmi 2013), and Lebanese youth suggest that monolingual Arabic speakers bear the stigma of being not "modern" or "cultured" (Zakharia 2009).

In Lebanon and Morocco, this sense of inferior status is reinforced by educational policies and structures in which "high status" streams of the educational system, namely, mathematics and sciences, are taught and assessed in foreign languages, thus marginalizing the humanities and social sciences, alongside the Arabic language and its speakers (Boum 2008; Boutieri 2012; Zakharia 2009). In Lebanon, this leads to student perception that French and English have greater utility than Arabic in the domains of science, technology, and business. Unequal linguistic access leads to differentiated academic and social chances (Boutieri 2012). Thus despite efforts to Arabize the school system in Morocco, for example, the linkage between the scientific streams and the French language effectively serves as a mechanism for reinscribing social hierarchy along linguistic lines (Boum 2008; Boutieri 2012). When considered alongside language policies in higher education, this situation exacerbates educational inequalities and vulnerabilities through diminished access to both higher education institutions and particular academic disciplines that operate in other languages (Boum 2008; Boutieri 2012; Zakharia 2009). In turn youth experience exclusion from a range of professional pursuits and disengagement from school.

Problems and Difficulties

As noted by English language teachers in the Gulf states, student motivation, underachievement, and reliance on rote learning and high-stakes testing create challenges for bilingual education (Syed 2003), and understanding motivation issues in those states requires a political economy and gender perspective. Ethnographic research in Qatar reveals the daily challenges to bilingual education, including differences between student and teacher language varieties and ambiguous language policies in schools (Al-Maadheed 2013). A number of studies have attempted to

address technical aspects of language education by looking at, for example, English language teacher preparation programs (e.g., Al-Hazmi 2003; Al-Seghayer 2005 on Saudi Arabia; Clarke 2007 on the UAE; Yamchi 2006 on Palestine); the implications of expanding English instructional time (e.g., Al-Issa 2013); various learning and assessment models; and predictors of motivation (e.g., Alsheikh and Elhoweris 2011). Furthermore, insufficient instructional resources, teacher preparation, and teacher support present obstacles for teaching foreign languages in some contexts, and for teaching Arabic in others (e.g., Bahous et al. 2011; Syed 2003; Zakharia 2009). As observed in various classroom contexts, such as Syria, interactions in the second language can be contrived rather than authentic (Hasan 2006) and students may graduate from ostensibly bilingual school systems in Lebanon, Morocco, and Qatar with limited knowledge of a foreign language, as well as difficulties with Modern Standard Arabic.

However, second language acquisition research in schools is often too narrowly focused on technical issues and has not sufficiently engaged sociocultural aspects, or political and economic dynamics, which may hold explanatory power. This literature often addresses one language or the other, rather than investigating language learning relationally. In addition, limited attention has been paid to bilingual education in minoritized languages in MENA, whether due to perceived inutility, research funding priorities, or political constraints on studying minoritized languages in nondemocratic states (e.g., Hassanpour 2012 on Kurdish).

Future Directions

Given the recent political upheavals in the MENA region, concerns about minoritized populations, and renewed attention to neoliberal reform, research on bilingual education in MENA necessitates attention to the political economy of conflict, migration, and social change. Situating problems of practice within broader social and political issues by engaging technical aspects of education with culturally relevant, contextualized, political-economic analyses may provide insights into improving the educational experiences of children and youth. Understanding youth perspectives about language learning, inequality, and social change is also critical for the promotion of strong bilingual education models that support minoritized youth in negotiating the terrain of political and economic uncertainty currently experienced in the region.

The 2011 and 2012 youth-led revolts in North Africa were in part a reflection of a gradual, “collective disengagement from the public school as a space of empowerment and integration” (Boutieri 2012, p. 445). Investigating the role of bilingual education in exacerbating or mitigating vulnerabilities is critical for developing sound bilingual programming that empowers minoritized youth, particularly in the context of violent conflict and the mass upheavals currently being experienced in the region. Research on language issues in the context of the Egyptian revolution (e.g., Bassiouney 2014) points to new directions for research in bilingual education. This may require a gender-sensitive approach, with attention to educational access and

quality for both girls and for boys. While the relationship between gender and language has been studied in Morocco to understand gender performances and women's agency in sociocultural context (Sadiqi 2003/2009), such examinations remain under-researched in the field of bilingual education in MENA, and in relation to the education of boys in particular.

In addition, a push to increase English language teaching in various country contexts in MENA has accompanied neoliberal reform in the region. Greater research is needed regarding the link between the expansion of English, neoliberalism, and privatization processes, and their impact on Arabic and other languages. Diversifying research methods to include social network analysis, life history studies, and ethnography of language-in-education policies would allow researchers ultimately to connect macro–micro phenomena.

Furthermore, in-depth studies of bilingual community education of minoritized languages, such as Aramaic, Tamazight, and Kurdish, may serve to promote the survival of these languages and identify relevant practices for teaching marginalized ethnolinguistic communities within national school systems. Finally, comparative studies in bilingual education are rare in MENA and may also provide insight into teaching, learning, and policy-related concerns, particularly at this historic juncture of disruption and change.

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Part IV

Bilingual and Multilingual Education in Africa and the Pacific

Bilingualism in South Africa: Reconnecting with *Ubuntu* Translanguaging

Leketi Makalela

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Abstract

South Africa has adopted a multilingual language policy, which valorizes multilingualism as a norm in its new sociopolitical dispensation that began in 1994. However, conceptions of multilingualism are still narrowly construed within the aegis of a oneness ideology that characterized the European enlightenment period (Ricento, T., *Journal of Sociolinguistics*, 4(2):196–213, 2000). Within this framework, languages are treated in isolation and as autonomous sets of skills that are taught and learned in linear and sequential fashion to avoid one language from being contaminated by the other. Yet the cultural value systems that predate European colonialism in South Africa assumed an interdependent worldview of plurality and fluid linguistic system between

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people of different language varieties. This chapter describes inherent tensions between Afrocentric and Eurocentric ideological notions of multilingualism and bilingual education through a historical overview of South African multilingualism from the precolonial era till the new sociopolitical dispensation. Using the pervasive African humanism concept of being, referred to as *ubuntu*, and a translanguaging framework (García, O., *Bilingual Education in the 21st century: A global perspective*. Miden: Wiley/Blackwell, 2009; García, O., & Li Wei, *Translanguaging: Language, bilingualism and education*. New York: Palgrave Macmillan, 2014), which recognizes alternation of languages as a norm in contemporary societies, the chapter couches the view that a reorientation of multilingual and bilingual education toward the African value system of *ubuntu* will be a catalyst for restoring social justice for the people whose languages were historically denigrated to the lowest social status. In the end, it offers insights on rethinking the South African multilingual space to accommodate fluid discursive resources where interdependence is highly valued over independence of language systems.

Keywords

Ubuntu translanguaging • African multilingualism • Education and literacy

Introduction

Despite South Africa's pretensions for an 11 official language policy, classroom practices still reflect monolingual bias, which puts multilingual speakers of African languages at risk of educational failure in comparison to English and Afrikaans mother tongue speakers. As seen elsewhere in Sub-Saharan Africa, conceptions of multilingualism are still narrowly construed within the aegis of a one-ness ideology that characterized the European enlightenment period (Ricento 2000; Makalela 2015). Within this framework, languages are treated in isolation and as autonomous sets of skills that are taught and learned in linear and sequential fashion to avoid one language from being contaminated by the other. Yet the cultural value systems that predate European colonialism in South Africa assumed an interdependent worldview of plurality and fluid linguistic system between people of different language varieties. This chapter describes inherent tensions between Afrocentric and Eurocentric ideological notions of multilingualism and bilingual education through a historical overview of South African multilingualism from the precolonial era till the new sociopolitical dispensation. Using the pervasive African humanism concept of being, referred to as *ubuntu*, and a translanguaging framework (García 2009; García and Li Wei 2014), which recognizes alternation of languages as a norm in contemporary societies, the chapter couches the view that a reorientation of multilingual and bilingual education towards the African value system of *ubuntu* will be a catalyst for restoring social justice for the people whose languages were historically denigrated to the lowest social status. In the end, it offers insights on rethinking the South

African multilingual space to accommodate fluid discursive resources where interdependence is highly valued over independence of language systems.

Early Developments: Multilingualism in Precolonial South Africa

The history of South African languages stretches as far back as 120,000 years ago when the first indigenous people – the Khoe and the San – settled in the country (Webb and Kembo-Sure 2000). The Khoe and the San people belonged to the same language family with different varieties, which became extinct after their contact with Europeans in the mid-1600s. The second wave of linguistic migration into South Africa was ushered in by speakers of Bantu languages who settled in the country around 600 BC. Bantu is the largest language family in South Africa, and it is known for its elaborate noun-class prefix system and its common stem/-ntu/ or its variant/-tho/, which means “human.” The speakers of these languages are believed to carry a value system of interconnectedness referred to as *ubuntu* or *botho* as realized in the injunction: “I am because you are, you are because we are.” Records of Bantu language history in precolonial times, their use, and writing systems are virtually unknown and undocumented in the literature due to many years of systematic exclusion from the colonial education system. Evidence suggests that these records were purposefully omitted by foreign anthropologists and linguists who were comfortable with the story that “peoples of Africa have not yet risen to the stage of education which can produce written records of important events or institutions” (Raum 1993, p. 3). We are, however, able to glean from folklore, art, rock paintings, and engravings of the indigenous people that there were greater forms of literacy in different languages, trade of minerals, architecture, and civilization found in the Zimbabwe of the Emperor Monomotapa whose space of control stretched over South Africa and other Southern African States (Cox 1992; Makalela 2005). I have observed previously that individualization of properties like cattle, the making of trademarks, drawing of maps, and recording of long messages by means of tallies are sufficient evidence that writing systems like pictographs and ideographs had already evolved by the time Africans came into contact with the Europeans (Makalela 2005). According to Raum (1993):

... the natives were able to record subjects apparently even of abstract nature, by means of incisions and to decipher them later, developing in conversation the subject thus recorded by reference to the tally. (Raum 1993, p. 11)

Outside of literacy practices, complex communication systems found between different ethnic groupings suggest mutual inter-comprehensibility of the languages used. The Khoe and the San who were hunters and guardsmen, respectively, shared resources and collaborated on complex social systems such as interethnic marriages. The Bantu language groups have also had a history of cohabitation and cross ethnic mobility for a period of about 1000 years before they came into contact with the

Europeans in 1652. During this time, they developed mining, trade, and agriculture where crops and seeds were shared across a wider spectrum of tribal, cultural, and linguistic affiliations. Visiting or finding another human being was highly valued – hence expansion of family system as seen in expressions such as “younger mother” or “elder father,” “stranger comes to my home so that we grow,” and “it takes a village to bring up a child.” Put differently, there was a continuum of language systems as well as inward and outward mobility between various ethnic or tribal communities. It is therefore useful to describe multilingualism before Western colonialism by emphasizing the notions of harmony and coexistence (Makalela 2005). These notions find resonance within the ancient value system that is captured in the injunction: “motho ke motho ka batho” or “umuntu ngumuntu ngabantu,” which translates into the English version: “a human is a human because of others” or “I am because you are; you are because we are.”

An important point to stress here is that communication and transmission of knowledge occurred through language varieties spoken and understood across a wider spectrum of the indigenous African languages. Basil Davidson (1992) expertly advises on African tribalism that predates European nationalism as follows:

In a large historical sense tribalism has been used to express the solidarity and common loyalties of people who share among themselves a country or a culture. In this important sense, tribalism in Africa. . . has always existed and has often been the force for good, a force creating a civil society dependent on laws and the rule of law. (Davidson 1992, p. 11)

Unlike the fear of the foreigner, which characterized the European medieval period and the resultant nation statism, the South African social organizational structure was endowed with *ubuntu*, which encouraged cohabitation and interdependence between people of different tribes and their languages. It was thus possible for Emperor Monomotapa to oversee a large space of tribes that today include seven Southern African countries: Zimbabwe, South Africa, Mozambique, Lesotho, Swaziland, Namibia, and Botswana (Cox 1992). To understand bi-/multilingualism in precolonial South Africa, it is important to highlight the plural sense of common loyalties and solidarity among people who shared culture and language varieties that were mutually inter-comprehensible.

Major Contributions: The Beginning of Monolingual Landscape in 1652

The arrival of Dutch settlers at the Cape of Good Hope in 1652 ushered in a new linguistic dispensation in South Africa. Troup (1972) presents the initial mission of the Dutch as follows:

Some five years after the wreck of the *Harlem* and 154 years after Vasco da Gama’s voyage, Jan van Riebeeck, a tough, much traveled and very able ship’s surgeon, set from Holland with three small ships, *Goede Hoop*, the *Dromedaris* and the *Reijger* to found at the Cape “a

depot of provisions,” to enable ships of the company to refresh themselves with the vegetables, meat, water, and other necessities, by which means the sick on board may be restored to health. (Troup 1972, p. 40)

This quote shows that the mission to settle at the Cape was temporary, but over time, it expanded to change the linguistic and cultural landscape of their newly found colony and impose Dutch monolingualism to the local communities. As they moved into the inland space, they clashed with the Khoe and San people as well as with the Bantu-language-speaking communities who had settled mainly in the upper regions. It is well known that the Dutch did not show any interest in learning languages of the indigenous people, which were associated with the “clucking of turkeys” (Alexander 1989, p. 21). It was this attitude toward local languages that rendered plural bilingualism or multilingualism virtually impossible. Instead, the local people had to have Dutch as the only language of communication in official domains such as schools.

The Dutch dominated the space of the new colony until the English settled in 1795. Part of the English mission was to replace Dutch with English in order to change the cultural landscape and exert influence on the local people. Fierce fighting for resources led to a constant clash between the Dutch and the British, which resulted in the Anglo-Boer war at the turn of the twenty-first century (1899–1902). This war in turn led to the Dutch and the British dividing South Africa into four colonies, Transvaal and Orange Free State (Dutch) and Cape Colony and Natal (British), since cohabitation between these two European settlers was virtually impossible. In other words, the English and the Dutch lived in isolation from one another and in four geographically separated, bounded spaces within the same country. It should be stated, however, that the oldest form of bilingual education in higher education was practiced, but not formalized, at the University of the Cape of Good Hope in 1783, which is the first South African university, which started with English as the only medium of instruction and later included Dutch (Steyn 1993). When framed in this light, it is evident from these early settlements that European monolingualism presented a diametrically opposed orientation to the ubuntu multilingualism discussed above. The latter valued interdependence between people and languages, whereas the former favored oneness and independence.

Second Major Contribution: Bilingualism in the Union of South Africa

In 1910, South Africa signed a union treaty as a way to quell war that had claimed many lives between 1899 and 1902. Another reason for the treaty was the realization that the Afrikaners (White Africans who were Dutch descendants) had grown in numbers and were uniting under a movement that was referred to as the Afrikaner Broederbond. At the same time, the Black Africans were also uniting against colonialism and threatened the power and dominance of both the Dutch and the British. Beyond these external factors, it was also increasingly becoming difficult for

the British to stay in the Cape and Natal colonies, without movement and expansion of trade in the upper colonies, Orange Free State and Transvaal, which had more opportunities for mining in places such as Johannesburg.

The political union was expanded to cultural “union” where the Dutch and English were considered official languages of the republic. The state constitution decreed bilingualism as follows:

Both the English and Dutch languages shall be official languages of the Union and shall be treated on a footing of equality and possess and enjoy freedom, rights and privileges. (Hill 2009, p. 8)

It is worth noting that this national language policy was short lived as it ignored the growing number of Afrikaans mother tongue speakers (mainly Dutch descendants who spoke a Creole that included Dutch, Malay, and Khoe and San languages) who were no longer comfortable with Dutch as their home language. Politically, the Afrikaners needed self-determination and then built up a protest movement that promoted the development of Afrikaans as a language in its own right. It was also shortly after the Union of South Africa that the African National Congress (ANC) was formed to represent the cultural and political aspirations of Black people who were conspicuously excluded from the union.

Hartshorne (1987) reminds us that it was during the First World War (1914–1919) when Afrikaans started replacing Dutch as the official language. Afrikaans then gradually substituted Dutch and it was duly developed and recognized under James Barry Hertzog who was the prime minister of the Union of South Africa from 1924 to 1939 (Hartshorne 1987). Indigenous African languages, on the other hand, were not developed for education purposes save for the orthographic inscriptions made by the missionary linguists as early as 1824. Here, the goal of the missionary linguists was to Christianize the local people through development of literacy in reading and translating the Bible.

The linguistic outcome of the Union of South Africa was that between the years 1918 and 1959, English and Afrikaans were used for learning and teaching. White schools were divided into either Afrikaans or English schools, with either of these languages used as the language of instruction and both languages taught as subjects. The missionary schools attended by Black learners, on the contrary, had a policy of learning through African home languages for the first 3 years and transition into English as a medium of instruction at grade 4. Afrikaans and English were taught as subjects in these schools. These racially segregated schools followed different bilingual programs where White children learned only White languages, whereas Black children learned Afrikaans, English, and their home language.

The universities of Cape Town and Stellenbosch then followed the English-Afrikaans bilingual medium program with courses available in both languages (Du Plessis 2006). In the subsequent years, there were changes from bilingual universities (mainly parallel medium) to monolingual universities due to Afrikaans-speaking students enrolling mainly at what eventually became Afrikaans universities. Non-Afrikaans-speaking students, on the other hand, moved to different

universities where Afrikaans was not the medium of instruction. This student movement led to a decrease in non-Afrikaans mother tongue students and to the dropping of English programs in the Orange Free State, Pretoria, Rand Afrikaans, and Potchefstroom universities (see Hill 2009). Also worth noting was a parallel development in the English-dominant medium universities that saw a decline in Afrikaans mother tongue speakers, which gradually led to the dropping of Afrikaans programs (Du Plessis 2006). These scenarios depict a gravitation toward separation of languages and a contradiction to the national language plan to unite Afrikaans- and English-speaking citizens.

Third Major Contribution: Separate Language Development During Apartheid

From 1948, Afrikaans became the official language of government, side by side with English. As stated above, all government schools had to become bilingual through the choice between Afrikaans and English or a combination of these two for instructional purposes. In addition, schools were compelled to teach Afrikaans and English as school subjects. In order to limit access to English, the Afrikaner government developed each of the nine African languages (Sepedi, Sesotho, Setswana, isiZulu, isiXhosa, SiSwati, isiNdebele, Xitsonga, and Tshivenda) for use as the media of instruction from grade 1 till grade 8 in the Bantustan homelands¹ (i.e., there were eight reserves for speakers of Bantu languages, which were created on the basis of perceived language differences) under the so-called separate development program. Afrikaans and English remained compulsory subjects for all schools (Heugh 2002).

The liberation movements protested against the policy of the separate development program until the old missionary language policy of first 3 years of education in home languages was reintroduced. This means that Black children could learn through their home languages for 3 years instead of 8 years. Another parallel movement on the part of the government was to increase tuition through the medium of Afrikaans in Black schools. As a result, tensions between the liberation movements and the state's insistence on Afrikaans reached a turning point when school children protested against introduction of Afrikaans as the language of learning in

¹Bantustan homelands refer to the reserves that were created and separated from one another on the basis of language difference. Bantustan literally means a stand or an area reserved for people speaking a Bantu language. During apartheid, speakers of these languages – Sepedi, Setswana, Sesotho, isiZulu, isiXhosa, isiNdebele, siSwati, Xitsonga, and Tshivenda – were segregated from one another, on the one hand, and from the White community, on the other hand. The Bantustans corresponded with the nine Bantu languages as follows: Lebowa (Sepedi speakers), Gazankulu (Xitsonga speakers), Republic of Venda (Tshivenda speakers), Bophuthatswana (Setswana Speakers), Qwaqwa (Sesotho speakers), Zululand (isiZulu speakers), Kangwane (siSwati speakers), KwaNdebele (isiNdebele speakers), Transkei (isiXhosa speakers), and Ciskei (isiXhosa speakers). It is also worth noting that the labor reserves, so-called townships, also underscored the extension of ethnolinguistic segregation at the periphery of cities and towns for Whites.

primary schools in what is known as the Soweto Student Uprising in 1976 (Hartshorne 1987).

Another development during apartheid was the creation of Black universities from 1959 till 1994 mainly in the linguistically segregated reserves for Black people. According to Hill (2009, p. 337):

The government promulgated the Extension of University Act (Union of South Africa 1959), which provided the framework for racial demarcation in higher education. This Act defined most established universities as “white” and prepared the ground for the creation of “non-white” institutions. The new institutions were further subdivided to serve specific ethnic groups, where ethnicity was operationalized in terms of race and language.

Outside of the “amaXhosa institution” (Fort Hare), which had come into existence much earlier, three other universities were established: University of Zululand, University of the North, and the University of the Western Cape (Hill 2009, p. 337). Except the University of the Western Cape that used Afrikaans, all other universities became English monolingual (Hartshorne 1987).

Work in Progress: Post Apartheid Multilingual Education

The case of post-independent South Africa merits some attention to demonstrate how a monoglossic lens can impede even grandiloquent policy statements. The South African Constitution accorded these 11 languages an official status: Sepedi, Sesotho, Setswana, isiZulu, SiSwati, isiXhosa, isiNdebele, Tshivenda, Xitsonga, English, and Afrikaans (Republic of South Africa 1996). Apart from granting official status to nine indigenous languages, together with Afrikaans and English, the Bill of Rights (1996) has made it possible for every child to be taught in their familiar language:

Every child has the right to receive education in the official language of their choice in public educational institutions where that education is reasonably practicable. (Republic of South Africa 1996, p. 29 (2))

The caveat “where that education is reasonably practicable” denotes a noncommittal stance of the state and devolution of such powers to school governing bodies which decide on school-based language policy. Some of the guidelines include a requirement of 40 or more learners for a language to be granted status of medium of instruction in public schools. The following year (1997), the Language-in-Education Policy stated:

Subject to any law dealing with language in education and the constitutional rights of the learners, in determining the language policy of the school, the governing body must stipulate how the school will promote multilingualism through using more than one language of

learning and teaching, and/or applying special immersion or language maintenance programmes. (Republic of South Africa 1997, p. 8)

Despite these opportunities for use of local languages in their plural forms, the actual practices reflect subtractive bilingual tendencies. That is, the first 3 years, instruction is in one's home language and then a transition into the medium of English at grade 4 takes place. Some schools have opted to introduce a "straight-for-English" policy; that is, education is conducted through the medium of English from the first grade. Thus, South Africa has had instances of both total assimilation and partial immersion transitioning into English monolingualism.

Problems and Difficulties

Various reasons have been given by scholars for the lack of implementation of multilingualism as prescribed in the constitution. These include costs, attitudes, lack of political will, and misinformation about the need for English (e.g., Alexander 2001; Heugh 2002). Failure to promote multilingualism can be associated with the wholesale adoption of a monolingual lens that was used to create ethnolinguistic boundaries at different stages of colonization. First, the missionary linguists divided mutually intelligible language forms into different languages when they worked in different parts of the country with no central coordination. IsiNguni language varieties (isiZulu, isiXhosa, isiNdebele, Siwati), on the one hand, and Sesotho language varieties (Sepedi, Setswana, and Sesotho), on the other hand, were written with different orthographies and inscribed as distinct languages from the point of view of the missionaries. The 11 official language policies relied on "invented" (Makoni 2003) or "artificial" constructions (Makalela 2005) in the same way that apartheid divided people into separate homelands as proclaimed in Dr. H. F. Verwoerd's decree: "Africans who speak different languages must live in separate quarters" (Alexander 1989, p. 21). Because the 1996 policy did not take into account the history of these varieties and their degrees of mutual intelligibility, it has fallen into ideological overtures of multiple monolingualisms with sealed boundaries, as was the case during the Bantustan homeland system of apartheid.

Moreover, the language-in-education document (Republic of South Africa 1997) prescribed that a learner in South Africa is required to have at least two languages as school subjects – one should be the home language and the second one should be the language of learning and teaching. This policy has recreated old patterns where one learns one's home language and English, with no opportunity for cross-African language acquisition. One would consider this a non-functional multilingualism or multiple unilingualism approach, which lacks a plural vision to enhance fluid multilingual practices (Makalela 2015). This means that languages have been separated and bounded in the same manner that the colonialists saw African multilingualism – as a conglomeration of mutually unintelligible languages.

More Problems and Difficulties: Literacy and Bilingual Assessment

Despite the South African constitutional commitment to 11 official languages, the language in education practices still reflects domination of Afrikaans and English, with virtually no use of indigenous African languages as languages of learning and teaching beyond grade 3. The national examination at grade 12, for example, can only be taken in Afrikaans and English – something that is contradictory to the premise of a multilingual society. Neville Alexander cites this situation emphatically as follows:

It is an amazing fact that South Africa, in spite of its modernist pretensions, is one of the few countries worldwide where at least primary school children are not taught through the medium of the mother tongue or a language of immediate community. . . . It is an equally amazing fact that within the South African context the only children who receive mother tongue medium education virtually from cradle to the tertiary level are the minority English and Afrikaans-speaking children of the country. Children born to parents whose home language is one or other African language; i.e., the vast majority of our children, are doomed to be taught through a medium of the second language (mostly English) from the third or fourth year of school, mostly by teachers for whom this medium is at best a second language but often only a third language. (Alexander 2001, pp. 16–17)

The maintenance of Afrikaans and English medium education systems reflects the many years of linguistic discrimination, not only from 1948 but also from the onset of colonial contact where local languages were castigated as “chuckling of turkeys” (Alexander 1989). This maintenance is also seen at tertiary institutions where either English monolingualism or Afrikaans-English bilingualism is the norm, whereas the majority of the students in these institutions have no opportunity to learn in any of the African languages. Here too, the universities reproduce the inequitable society of both the colonial and apartheid periods.

Future Directions: Connecting with Ubuntu Translanguaging

Whichever way one looks at it, language education is about people development. South Africa is a linguistically resourceful and complex country that has not yet harnessed these rich resources to its cultural advantage. If it is to become a serious player in modern times, the languages through which knowledge, value systems, and identities are connected will need to take center stage. This means a mission of precolonial rediscovery and self-definition as aptly expressed in the preface to *Let Africa Lead* (Khoza 2013) by the former president of South Africa, Thabo Mbeki, who states:

I have been exhorting Africans, and especially the intelligentsia to define themselves so that we, as a people, can devise and implement our own political and socioeconomic programmes of action. We have to meet prevailing global challenges from within our *own*

worldview and proceed to action from our own authentic possibilities based on the culture and competencies of Africans themselves. (Khoza 2013, p. xi)

Taken from this is the conviction that our conception of bilingualism should be informed by an ideological departure from separatist world views of colonialism and premised on the plural world view encapsulated in *ubuntu*, a locus of African humanism that values social, cultural, and linguistic fluidity (Makalela 2014, 2015). While *ubuntu* is essentially a philosophy and a way of life for many Africans, its principles of belonging together, discontinuous continuity, and valorizing interdependence over independence provide a useful framework to see how African languages cross-pollinate and to offset rigid boundaries between the 11 official languages that are based on oneness ideology.

A trifocal language in education policy that valorizes linguistic crossovers in practice seems the most natural choice for South Africa in the near future. Departing from separation of languages as “boxed” entities, the language policy needs to address this artificial bounding of languages by providing, among other things:

- (a) Spaces for Nguni language students (speakers of isiZulu, isiXhosa, isiNdebele, siSwati) to choose Sotho languages (Sepedi, Setswana, and Sesotho) as school subjects
- (b) Opportunities for Sotho languages students to learn Nguni languages as school subjects
- (c) Provisions for mother tongue speakers of English, Afrikaans, and minority African languages (Xitsonga, Tshivenda) to learn either a Sotho or Nguni language
- (d) Optimal space for majority language students to learn minority languages (Xitsonga and Tshivenda)

It is important to note that the majority of South African children are exposed to more than three languages before they are 6 years old. In other words, the scenarios depicted above are already socially active but not recognized officially and certainly not in education. In most social encounters, the blend of Nguni, Sotho, English, and Afrikaans, referred to as Kasi-taal in the Black townships (Makalela 2014), predominates. The old boundaries between the languages are increasingly weakening due to the desegregation policies, dismantling of Bantustan homelands, translocal movements, and rapid urbanization despite many years of linguistic boxing through colonization and apartheid. With regard to languages of learning and teaching, it is not uncommon to hear languages juxtaposed in dialogues in African classrooms. This is possible because the African worldview of *ubuntu* is all encompassing and versatile in accommodating variation, without conflict.

I have referred to this logic of language crossing previously as *ubuntu* translanguaging (Makalela 2014, 2015), a local derivative from the translanguaging framework developed by García (2009), among others, to focus on what speakers do with the languages rather than on the languages as separate entities. Within the *ubuntu* translanguaging, the collective and discursive use of more than one language

in single lesson events supersedes the use of an individual language because this plural communication repertoire is what informs the speakers' reality and interpretation of their world. It is in this connection that *ubuntu* becomes the cultural competency Africans have and the one they can rediscover to face the ideological challenges of monolingual bias. In *ubuntu*, one rediscovers a plural vision of interdependence of the language systems and their fluid, overlapping, and discursive nature to match the everyday ways of communicating where the use of one language is incomplete without the other.

Cross-References

- ▶ [Bilingual Education for Indigenous Peoples in Mexico](#)
- ▶ [Bilingual Education in Europe: Dominant languages](#)

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- J. Cenoz and D. Gorter: [Translanguaging as a Pedagogical Tool in Multilingual Education](#). In Volume: Language Awareness and Multilingualism
- L. Makalela: [Language Policy and Education in Southern Africa](#). In Volume: Language Policy and Political Issues
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Bilingual Education in Sub-Saharan Africa: Policies and Practice

Grace Bunyi and Leila Schroeder

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Abstract

Africa is reputed to be the most complex multilingual part of the world. With over 2,086 indigenous languages, the degree of multilingualism of individual countries ranges from five languages in Lesotho and Swaziland to over 450 in Nigeria (Chumbow, B. S., *Mother tongue-based multilingual education: Empirical foundations, implementation strategies and recommendations for new nations*. In Mellwraith (Ed.), *Multilingual education in Africa: Lessons from the Juba language-in-education conference* (pp. 37–55). London: British Council, 2013; Ouane, A., *Towards a multilingual culture of education*. Hamburg: UNESCO Institute for Education, 2003). Some of these languages are spoken by small populations whereas 16 are spoken by large populations across national borders. Consequently, most adult Africans are multilingual in their mother tongue, another indigenous African language and/or a widely spoken language. In addition, people who have gone through school will also speak the official language which is often the language of the former colonizing European power and which is learnt largely only in school contexts. Given this complex linguistic environment, the role that the different languages should play in the national life of the different countries generally, and in education in particular, has attracted policy determination since the advent of Western-type education in Africa.

In this chapter, we examine the shifts in language-in-education policies with particular reference to inclusion of African languages in education as we analyze the factors that have contributed to the evolution of the policies and practices. Secondly, we analyze recent and current developments with regard to the inclusion of African languages in national policies, language and materials development, and national language planning to facilitate the teaching of these languages and their use as languages of instruction. Thirdly, we discuss the problems and difficulties that bilingual education policies encounter especially with regard to pedagogical challenges, and conclude the chapter with proposals for successful development and implementation of bilingual policies.

Keywords

Bilingual education models • Implementation • Teacher preparation • Language attitudes • Language planning • African languages • Language development

Introduction

With over 2, 086 indigenous African languages in 52 countries each with its own national policies and practices for dealing with multilingualism in education, the language policies and practices scene in in Sub-Saharan Africa is very complex. In this Chapter, we try to capture the trends while summarizing the history and the current challenges for implementation of multilingual education in a number of these countries. We examine the shifts in language-in-education policies with particular reference to inclusion of African languages in education as we analyze the factors

that have contributed to the evolution of the policies and practices. Secondly, we analyze recent and current developments with regard to the inclusion of African languages in national policies, language and materials development, and national language planning to facilitate the teaching of these languages and their use as languages of instruction. Thirdly, we discuss the problems and difficulties that bilingual education policies encounter especially with regard to pedagogical challenges, and conclude the chapter with proposals for successful development and implementation of bilingual policies.

Early Developments

Bilingual education in Africa is as old as schooling in Africa which came with the introduction of Western-type education and colonial languages by European missionaries and colonial governments – British, German (up to the end of WW1), French, Belgian, Portuguese, and Spanish. Prior to colonization, only in parts of North, West, and East Africa where Islam had been introduced, was literacy in Arabic taught among the Muslim communities (Abdulaziz 2003).

The question of which language(s) are to be taught and which language is to serve as the language of instruction (LoI) at what level has been debated and different language policies have been articulated. Often, the language policies adopted depended on the colonial power's cultural and political standpoint (Abdulaziz 2003).

The British adopted a separatist stance toward the Africans and a policy of indirect rule through traditional authority systems. The use of African languages was therefore appropriate and encouraged. These languages as LoI in the early classes of primary education were therefore the norm in British colonies such as Ghana, Nigeria, and Malawi. This policy was strengthened by recommendations of education commissions such as the Education Commission for Africa and the Phelps-Stokes Commission of 1920–1922 in West Africa and 1924 in East Africa, which advocated the use of African languages as LoI in the early classes Bokamba (1991). The Belgians too in Rwanda and Burundi encouraged the use of African languages as LoI (Abdulaziz 2003). On the other hand, in Tanzania (then Tanganyika) the Germans used the lingua franca Kiswahili for administration purposes, and thus their language policy favored the use of Kiswahili in education.

The French and the Portuguese held assimilationist stances toward the Africans. The French had the objective of teaching the Africans the French language and culture so that those who were successful would become “Frenchmen” and “Frenchwomen.” Similarly, the Portuguese held the view that their African colonies were part of metropolitan Portugal and education was offered in Portuguese (Abdulaziz 2003).

The situation, however, was more complex than the preceding paragraphs suggest. The European community in Africa – missionaries, colonial government officials, settlers, and business men and women – had different interests served by different language policies. In the British colonies, interested in proselytization, missionaries preferred literacy development through the mother tongues; colonial

government officials were looking for Africans with some knowledge of a lingua franca and or English to serve as junior clerks and interpreters while settlers and business people wanted docile workers [Pennycook (2002) in Lin (2005)] and therefore preferred education in and through the African languages. Consequently, language policies changed frequently, depending on whose interests won the day (see Bunyi 1996 for a discussion on Kenya).

In the case of Cameroon in West Africa, French missionaries preferred use of African languages in education whereas the French colonial administration preferred French. According to Echu (2004), to ensure that education was offered only through French, in 1917, the French colonial administration offered a special subsidy to schools that used French as the LoI. This led to the closure in 1922 of 1,800 schools run by the American Presbyterian missionaries, in which Bulu language was used as the LoI.

The Portuguese were even more aggressive in discouraging use of African languages. In a 1921 decree, the Portuguese forbade the teaching of other foreign languages and African languages in their colonies – Angola, Guinea, Mozambique, and Cape Verde. Subsequently, Portuguese missionaries who used African languages in education were punished (Abdulaziz 2003).

In Somalia, which is linguistically more or less homogeneous, the north was colonized by the British and the south by the Italians. English was used as the language of administration and education in the north. In the south, where access to primary education for the Somalis was extremely limited, Italian was used as the language of administration and as the language of education (Abdulaziz 2003).

Ethiopia was the only African country that did not experience colonization except for a short period (1935–41) when part of Ethiopia was controlled by the Italians. In this period, policies endorsing use of major Ethiopian languages in education were enacted, and Swedish and American missionaries used Ethiopian languages in primary schools (Benson et al. 2012).

Side by side with evangelizing and teaching literacy, the British and German missionaries were working on African languages developing orthographies, grammars, and dictionaries for the purpose of developing literacy in the languages. In Tanzania, German missionaries wrote Kiswahili grammars and worked on developing other Tanzanian languages. In Central Africa, British missionaries developed African languages such as ChiBemba in Zambia, Chichewa in Malawi, and Shona and Ndebele in Zimbabwe. However, in French colonies, because the French colonial administration discouraged development of African languages, most of these languages had not acquired orthographies at independence (Abdulaziz 2003).

Major Contributions

Bilingual education programs and policies in sub-Saharan Africa have been shaped by different factors including search for national identity and integration, the work of the OAU/AU, declarations of meetings and conferences, research and publications, education commissions, and NGOs and donors.

Search for National Identity and Integration

Many African countries emerged from colonialism in the 1960s, fragmented due to boundary setting by European powers during the Berlin Conference of December 1884-January 1885 which ignored ethnolinguistic considerations (Abdulaziz 2003). On attainment of independence, determination of the role of the many languages – European languages, national languages of wider communication, and many African languages – had to be made. Except in Tanzania, all newly independent nations chose the language of their former colonizers – English, French, Portuguese, or Spanish (in Equatorial Guinea) – as the official language and the language of education. The argument was that the colonial languages were neutral and their use more equitable because they did not belong to any one of the communities that formed the nations.

In Tanzania, Kiswahili, an African language spoken widely in the country, was chosen as the official language and the LoI in primary schools. However, following the abandonment of socialism and adoption of capitalism from the late 1980s use of English as LoI has increased. Enjoying government sanction, English has become the LoI in private pre-primary and primary education (Swilla 2009).

Contribution of the Organization of the African Union (OAU)

The OAU which became the African Union (AU) in 2002 has consistently emphasized the need to promote African languages especially in education (Matsinhe 2013). In its 1963 Charter, the OAU included African languages together with English and French, Arabic, and Portuguese as the working languages of the organization and all its institutions. The key landmarks in the OAU's support for African languages in education include the establishment of the Inter-African Bureau of Languages (OAU-BIL) in 1966 which facilitated the development of the Language Plan of Action for Africa in 1985. The Plan was adopted in a Heads of State meeting in 1986.

Although not much was done by way of implementation of the Language Plan of Action and the OAU-BIL closed down in late 1980s, the African Academy of Languages (ACALAN) was established in 2006 to provide leadership in development, promotion, and use of African languages with a specific objective of promoting multilingualism in education. Further, concerned about the content of the education system in sub-Saharan Africa, the AU launched the Second Decade of Education for Africa 2006–2015 in the 2006 Khartoum Heads of State and Governments of the AU Summit. The Summit underscored the need to strengthen mother tongue education and teacher training (Matsinhe 2013).

Although these efforts of the AU have not borne much fruit in terms of changing policies and practice toward increased use of African languages in education, they have served to keep the issues alive.

Continental Level Meetings and Conferences

In addition to meetings of African heads of state and governments of the OAU/AU, several other meetings and conferences attended by academics, linguists, government officials, UN agencies, and other organizations have been held as follows:

- The UNESCO sponsored Second Festival of African Cultures and Civilization (FESTAC) held in Nigeria in 1977. The colloquium attended by 51 countries and UN organizations recommended the use and teaching of African languages in education institutions, literacy campaigns programs, and in the media. It also encouraged collaboration in teaching and research in African languages.
- The March 1997 Conference of Ministers on Language Policy in Africa organized in Zimbabwe by UNESCO in collaboration with others. The meeting adopted the Zimbabwe Declaration, urging African Governments to make clear policy statements and develop timetables for implementation, train language practitioners in the various professions, produce teaching and learning resources, and give value to African languages by rewarding competence in these languages.
- The First International Conference on African Languages and Literatures held in Asmara in 2000 attended by concerned African academics and scholars of African studies. The conference adopted The Asmara Declaration on African Languages and Literature. The Declaration held that African children have the inalienable right to learn in their mother tongue and the need to develop African languages for effective development of science and technology in Africa.
- The 2005 ADEA Windhoek, Namibia Regional Conference and Experts Meeting on Bilingual Education publications.
- The 2010 Ouagadougou Conference on Integration of African Languages and Cultures into Education.
- The July 2014 International Conference on African Languages and Literatures held at Kenyatta University in Nairobi meant to take stock of “post-Asmara 2000” and chart the way forward.

As with the initiatives of the OAU/AU, recommendations and declarations from these meetings and conferences have helped to keep the discussion alive and thus, perhaps more indirectly than directly, contributed to the evolution of pro African language-in-education policies and practices.

Research and Publication

Research in the use of mother tongues as LoI and in publishing mother tongue materials has yielded positive results.

The Six-Year Primary Project

The Six-Year Primary Project was carried out in the Ife region in Nigeria in 1970. In the project an experimental group was taught in Yoruba for the first 6 years of

primary school. Experimental group students were also taught English by a specialist teacher of English. A control group of students was taught in Yoruba for the first 3 years and later in English. Similar content materials were used with both groups of students. Evaluations of the project reported very positive results for the experimental group students. The experimental group students outperformed their colleagues in the control group in all subjects including English (Adegbija 2003). The study also showed that additional advantages of teaching children in their mother tongue include cultural, emotional, cognitive, and psychosocial benefits.

Pédagogie Convergente or “Convergent Pedagogy” in Mali

In an effort to address the problems of school dropout, repetition, and poor academic achievement, the Mali government introduced the use of Malian languages officially recognized as national languages as LoI in Grades 1–6 in 1979. In 1987, a new pedagogical approach the *Pédagogie convergente* or ‘*Convergent pedagogy*’ was introduced. Twelve out of 40 Malian languages are used for instruction, while French is taught as a second language, focusing on developing functional bilingualism to address transition from the national language to French (Bühmann and Trudell 2008). Learning achievement assessment reports indicate that:

Students in *Pédagogie convergente* schools perform significantly better in French and mathematics than their counterparts in French-only schools. In addition, *Pédagogie convergente* students are reported to be enthusiastic, active and communicative. (Bühmann and Trudell 2008, p. 12)

Rivers Readers Project

Another early experiment in the use of African languages in education was the Rivers Readers Project also implemented in Nigeria in 1970 in the Rivers State. Within the project, initial literacy was taught in about 20 minority languages spoken by small numbers of people. The languages were also used as LoI for all subjects except English for the first 2 years. An important component of the project involved development of the minority languages and production of literacy materials. The project managed to produce literacy materials such as primers, supplementary readers, teacher’s notes, orthography booklets, and dictionaries in 15 of the languages at a very low cost (Adegbija 2003). The project demonstrated that the cost of producing materials in African languages need not be prohibitive.

Education Commissions

Since the colonial era, and starting with the 1909 United Missionary Conference in Kenya, language policy issues have been addressed through education commissions. In the British colonies, the two Phelps-Stokes Education Commissions, the first to West Africa in 1919 and the second to East Africa in 1920–1922, recommended the use of the learner’s first language in the early years of schooling. In postindependence

Kenya, the first education commission (1964) recommended the use of English as LoI from first year of school with the mother tongue allocated one lesson per day for storytelling activities. This was reversed by the second postindependence commission (1976) which recommended teaching in mother tongues for the first 3 years and switching to English in the fourth year. Subsequent commissions upheld this recommendation (Bunyi 2001). In Botswana, the first National Commission on Education of 1977 recommended teaching in Setswana up to the fourth year of school and then switching to English. Although the second education commission of 1993 recommended a change to English from the first year, this was not implemented (Albaugh 2012). In Ghana, the 1967 Education Review Committee recommended use of local languages in the first 3 years of school. However, this was reversed in 2002. In Senegal, the 1981–1984 National Commission for Education recommended mother tongue education in the first years of schooling.

Regime Changes and Nationalistic Programs

Changes in political regimes and declarations of nationalistic programs have come with language-in-education policy changes in several postindependent African countries. In Burkina Faso, African languages were introduced in schools following the 1979 revolution. In Burundi, under the Kirundization and Ruralization program of 1973, Kirundi was made the LoI throughout primary education with French taught as a subject from the third year. In Ethiopia, on overthrowing Haile Selassie in 1974 the socialist party gave all Ethiopian communities the right to use their languages in education (Heugh et al. (2012). Other examples where changes in regime resulted in language policy change are the Democratic Republic of Congo (DRC), Eritrea, Ethiopia, Malawi, Somalia, and Togo (Albaugh 2012).

However, unlike in other countries, in Rwanda, linguistic reforms associated with change of regime have focused on change from French, Rwanda's colonial language, to English as the official language with Kinyarwanda. Before the genocide in 1994, the official languages were Kinyarwanda which is spoken by 100 % of the population and French. Two years after coming into power, the post-genocide government added English as an official language and removed French as one of the official languages in 2008. Between 1996 and 2008, Kinyarwanda was the LoI in the first 3 years of school and learners could choose to transit into either French or English as LoI classes. The 2008 linguistic reforms made English the only LoI from the first year of school. This drastic change is attributed to several reasons including the current government's desire to delink itself from France. France accused President Kagame of having a role in the killing of the former president which precipitated the genocide (Steffja 2012).

Contribution of NGOs and Donors

Nongovernmental organizations (NGOs) and some donors have implemented small-scale mother tongue education pilot projects in various countries. In Cameroon, the

Summer Institute of Linguistics (SIL) working with the University of Yaounde set up the project PROPELCA implemented in private schools in 1980. The PROPELCA project was endorsed by the Cameroonian government for implementation in public schools in 1995 (Echu 2004).

Experimentation with bilingual education in Burkina Faso started with the “Ecoles Bilingues” supported by OSEO, a Swiss NGO, and academics at the University of Ouagadougou in 1994. In 2005, OSEO supported 88 schools in seven languages. Another very small project is the “Ecoles Satellites” program implemented by the Ministry of Basic Education with UNICEF support. In Mozambique the PEBIMO bilingual experiments in Changana and Nyanja languages with World Bank and UN support were implemented from 1993 to 1997. This led to the development of 16 Mozambican languages for use in bilingual education. In 2003, 10 of these were used in schools. Bilingual education increased to cover 17 languages in 75 out of 8,000 schools. Despite the success of these initiatives in their respective countries, they have not been taken up by Ministries of Education.

Search for Quality and Equitable Education

Impetus for quality education was created by the Education for All (EFA) process starting with the 1990 World Conference on Education for All and the goal of quality education for all by 2015. In a few countries, policies have shifted in favor of African languages as a result. In Zambia, arguing that the case for local languages had been proven beyond doubt, the policy, *Focus on Learning* (1991), a response to the EFA goal, stated that Zambian languages would be the basic languages of education from grades 1–4 (Linehan 2004). Zambian languages had been dislodged from education by the 1966 Education Act.

In a 2003 Ministry of Education document in Cameroon, the use of Cameroonian languages as LoI was adopted as a strategy for improving achievement of learning competencies in reading, writing, and math (Albaugh 2012). This followed the successful implementation of the PROPELCA mother tongue as LoI project first in private schools in 1980 and expansion to public schools in 1995.

Work in Progress

The quest for minority language groups’ equal access to education slowly continues. This has taken the form of new national early childhood education policies, experimental pilot programs, and large-scale government-mandated MLE programs. Three language policy themes predominate in Africa – inclusion of African languages in national policies, materials development for African languages, and language planning at the national level. The status of African languages in national education policies is changing as recently as this year (2014) in Mozambique and Ethiopia.

Inclusion of African Languages in National Policies

While the colonial languages were a means of communication and commerce, they also “became an identifier of both inclusion and exclusion in the state” (Trudell 2012, p. 2). Most of Africa’s countries have not drastically changed the language policies they inherited from the colonial era, but the *exclusive* use of the colonial languages is diminishing.

The number of African states still using *European languages only* for education is 11, according to Albaugh (2012, pp. 1–2). This represents progress from 2004 when it was 15, and 1960 when it was 21 nations using European languages only. Most changes favor African language use in the early years of education, thus giving rural children a chance at inclusion in national education systems.

A country which has been moving in this direction since independence is Mozambique. Before independence in 1975, “Metropolitan Portuguese” was the only language of education. This changed slightly after independence, when “Mozambican Portuguese” became the LoI. In the civil war period, the rebels enforced the use of national languages in several zones (Albaugh 2012, p. 46). Now, Portuguese is still the most widely used LoI and the official language. But for 15 language groups, mother tongue use in education is expanding. Each province may choose three Mozambican languages to develop for a bilingual curriculum. In Tete Province, for example, Nyungwe, Nyanja, and Sena may be used, with Portuguese introduced as the L2.

Another example is Zambia. Zambia’s Permanent Secretary issued a statement in 2013, that Zambian languages would be used as LoI with the English language introduced as a subject at grade 2, although English would continue to be used as LoI from grade 5 to tertiary level. That policy was to be implemented in 2014. To back up the policy statement, Zambia’s Ministry of Education has developed a National Literacy Strategy which is meant to enhance the teaching of initial literacy in Zambian languages in primary schools. That strategy has been followed by development of syllabi and instructional materials for teaching in all seven official Zambian languages. Similar policy changes are happening in South Sudan and Burkina Faso. By 2008, Senegal had authorized experimental bilingual programs in six of its 38 indigenous languages, though implementation was weak (International Network for Language Education Policies 2013).

Language and Materials Development

No educational language policy can be applied without language development and materials development. The continent’s indigenous languages continue to be analyzed, writing systems developed and used, and oral literatures documented. National and international NGOs and universities have contributed to these efforts. Language documentation is foundational to their use in education with online dictionaries, spelling rules, and grammatical descriptions enabling pedagogy.

Most African languages are still in the “developing” category, category 5 on the Expanded Graded Intergenerational Disruption Scale (EGIDS). “Developing” indicates that a language doesn’t yet enjoy widespread use for literacy, but its literature is

Table 1 Status of language development in selected countries

Country	# of living languages	Institutional	Developing
Burkina Faso	69	4	25
Cameroun	280	12	91
Chad	131	11	32
Congo	62	3	16
DRC	212	8	33
Eritrea	15	7	5
Ethiopia	88	30	12
Gambia	12	4	2
Kenya	67	14	31
Mali	66	8	21
Mozambique	43	5	22
Nigeria	522	22	80
Senegal	38	9	13
Sudan	75	9	13
South Sudan	68	25	13
Tanzania	126	3	18
Uganda	41	12	19

being used by some, and is in vigorous use by the community according to the Ethnologue editor (Lewis 2014). But the number of languages with “institutional” status (where the language has been developed to the point that it is used and sustained by institutions beyond the home and community) is rising. Some examples from sub-Saharan Africa show progress being made in language development as shown in Table 1 (“number of living languages” includes all official languages). Despite the magnitude of the challenges, Burkina Faso is one country which is making obvious strides toward development of its African languages (Ouane and Glanz, 2011) and Namibia is another. Namibia launched the Indigenous Language Initiative on 5 December 2014, aiming to standardize orthographies and develop dictionaries and other written materials (Rhodes 2014).

National Language Planning

There has to be a *local will* behind the political will and official policies, or implementation of good language policies will fail. The impact of national language planning on the use of African languages in education has been dramatic in Tanzania, Eritrea, and Ethiopia.

With a socialist approach to governance beginning in 1967, a national policy systematically promoted Kiswahili as Tanzania’s official language of administration and education while maintaining English as an official language. Eritrea has declared nine indigenous languages as official languages, developed materials for use in schools, and embarked on an ambitious program of implementation (Walter and Davis 2005).

Another inspiring example of policy implementation is Ethiopia, where strong support starts at the top, and where implementation power is delegated to each of its nine regions. In 1994, the Ministry of Education called for the use of learners' mother tongues for literacy and learning through the full 8 years of primary schooling. Amharic is spoken as a mother tongue by roughly 27 % of the population (Heugh et al. 2012) while an estimated 86 additional languages are spoken as mother tongue by the mostly rural populace (Lewis 2014). The policy includes the teaching of Amharic from grades 3–5 to students with other L1s. English is introduced as a subject from grade 1, not becoming the LoI until grade 9. The policy is bilingual for L1 speakers of Amharic and trilingual for speakers of the other languages, with Amharic, English, and the L1 as languages of education. Heugh et al. (2012) have remarked: "The number of languages in which MTM [Mother Tongue Medium] education has been developed should cater for up to 84 % of students in the school system. This is a remarkable achievement for any country" (p. 49).

Problems and Difficulties

Gaps Between National Policies and Local Implementation

Only a strong political will can bring the cohesion necessary between the infrastructures which can carry out MLE policies. Local initiatives, NGO interventions, and university research may all strongly support MLE programs and policies, but without the kind of language planning done in Eritrea and Ethiopia, no lasting changes actually seem to take place. Discontinuity between policy and practice is the norm from Mozambique to Nigeria and the DRC (Orekan 2010; Trudell 2012).

Educators make choices, either at the provincial level, the district level, or even within individual schools, as to whether they will follow national policies. This is especially true in cases where aspects of a policy or practice actually discourage implementation. A case in point is the language of testing. The language of tests determines which languages will be used as LoI (Brock-Utne and Alidou 2011; Nyaga 2013). In Kenya, where national policy states that mother tongue is the LoI in preschool, and also the LoI through grade 3 except for the subjects "English" and "Kiswahili," the policy is rarely followed. Impediments to implementation are simple: (1) mother tongue as a subject is the one subject not assessed in national exams, which are only given in English; and (2) content area textbooks are only in English. Development of exams in the mother tongue is permitted but rarely carried out because the local will to develop the tests must also be there.

An acute need for language planning also shows itself in teacher postings. In Kenya, teachers are often assigned to schools where their L1 doesn't match that of the children. In 2013, when one of the authors led training for teaching Maasai reading in grades 1–3, over 10 % of the 40 teachers attending did not speak the language. Though they spoke other languages themselves, they had been assigned to early primary classes in the Maasai areas.

The same phenomenon of hard-to-implement national policies has been documented in Nigeria (Orekan 2010 p. 23) and Ghana (Owu-Ewie 2006, pp. 76–80). Based upon the successes of Ethiopia, Eritrea, and Tanzania, it is obvious that extensive language planning, from the national level to the grassroots, is essential to implementation of multilingual language policies.

Pedagogical Challenges

Pedagogical challenges to successful implementation are often dependent upon policy details at the language planning level. They are also very sensitive to the language attitudes of implementers and language communities.

Lack of Linguistically Appropriate Materials

A widespread challenge is the need for development of local languages. Orekan (2010, p. 24) says of Nigeria: “Implementation of the policy is to be accomplished through the development of indigenous languages, by creating orthographies and dictionaries, and writing of primers and other textbooks.” The same is true for many sub-Saharan nations.

Before reading textbooks can be developed, a set of spelling rules must exist, requiring the efforts of linguists and mother tongue speakers. Mother tongue speakers and experts in applied linguistics must work together to produce pedagogical materials which reflect the nature of the language and the culture of a people group (Schroeder 2013; Trudell and Schroeder 2007). This material includes texts to read and to learn different content, as well as dictionaries and examinations. A larger body of written literature, beyond materials designed for formal education, promotes mother tongue literacy for an entire language community (Matsinhe 2013).

Weak or Nonexistent Bilingual Education Models

Certain bilingual education models are now widely established, or proven, as essential to academic success. All of them include these elements:

- **Time to develop decoding and comprehension skills:** Children need to spend at least 3 years, optimally six, reading a language they already speak and understand, developing fluency and the skills they already have orally, in writing (Walter 2013, p. 276).
- **Oral second language teaching:** When additional languages not yet known by children are introduced, they should be taught, not via “reading,” but orally and systematically, as a subject, beginning normally around age 7 or 8. By then, their mastery of their first language enables them to add other languages. As part of that instruction, they need a substantial vocabulary in that language, auditory awareness of its phonemes, recognition of the graphemes used in its writing system, and ability to communicate orally via that language (Genesee et al. 2013). This is especially true for English, because there is almost no correspondence between the vowel graphemes of English and those of any African language.

- **Transitional reading instruction** can then ease the cognitive leap to English, but transitional reading materials are rare anywhere on the continent.
- **Content area instruction in the language of the child, initially.** This maximizes cognitive development and reading ability in their language. Even after transitional reading has been taught for 1–2 years, explanations of difficult, context-reduced concepts should still be supported by the teacher with the first language and focused vocabulary development in the L2.

Lack of Teacher Preparation

Another hindrance to successful bilingual education implementation is inadequate teacher preparation. Nyaga (2013, p. 57), referring to Kenya, says that “although a highly multilingual country with 60 different languages and a language-in-education policy that supports the use of children’s L1s in the early years of schooling, teacher training colleges do not include multilingual teaching in the curriculum.” A foundational element of training in these colleges should involve advocacy for the use of young children’s mother tongues in school and methodologies which reflect the nature of those languages (Schroeder 2007, 2013) and inservice training in language-specific use of reading pedagogy. One size does not fit all languages (Schroeder 2013).

Teachers’ Language Attitudes

Most detrimental of all may be language attitudes of teachers, their language communities (Muthwii 2010), and policy makers. The entire continent seems to believe that education, development, and knowledge acquisition are directly related to mastery of the former colonial languages (Matsinhe 2013). Evidence of prioritization of these languages is in classroom “labels” (Nyaga 2013; Schroeder 2007). Examples of this were evident throughout Tharaka District of Kenya in 1998, despite a national policy supporting early primary education in the mother tongue (Schroeder 2007). English ABC charts were used on walls of preschool classrooms. As recently as 2013, the same was evident when one of the authors visited 20 Maasai schools with a mother tongue intervention project underway. Chalkboards were neatly filled with English words and head teachers had posted signs in English, forbidding children to use their mother tongue.

Kenya is not unique in seeming to devalue the use of indigenous languages in schools. Senegal’s president recently reversed a long-standing policy allowing the use of local languages in education, presumably because its people were not lobbying for this, and Ghana’s public opinion toward its minority languages is even more negative (Albaugh 2014, pp. 121 and 143).

Future Directions

Language-in-education policy making is an area that will require serious attention. Except in a few cases, policies in support of African languages have been largely the doing of central state agencies with little participation by local

communities and other interested parties. Yet, because of the association of European languages with social and economic power in these countries, such policies have been viewed negatively by both the elite and the nonelite of Africa. To ensure support of these policies, there will be a need for policy making to adopt a bottom-up approach.

A bottom-up approach will provide the required space for discussion of a broad range of education issues such as the poor learning outcomes, unequal learning outcomes, repetition, and school dropout. It will also provide the required space for education beneficiaries and actors in education to be educated on the benefits of education in African languages. Writing about Mozambique, for example, Chimbutane (2011) reports:

Although the general trend in [Mozambique] is to regard Portuguese as *the* language of access to formal labour markets and associated socio-economic mobility, the introduction of bilingual education is contributing to destabilising this 'consensus' by raising community awareness about the actual and potential capital value of African languages. (p. 138)

However, it will also be important to clarify that education in African languages does not mean denial of powerful international languages that continue to be associated with upward social mobility in Africa.

Education as a route out of poverty continues to be valued in Africa as demonstrated by the expansion in enrolment when the education cost barrier is removed through free primary education programs. Consequently, pilot programs that demonstrate that use of the mother tongues as LoI improves learning and educational success should have a longer duration than is currently the case. Indeed, such programs need to be supported long enough for communities to realize their added advantage and demand similar programs.

Language-in-education policies have continued to be made as if they were stand-alone policies. However, Rizvi and Lingard (2009, p. 4) in Trudell (2012) note: "While policy is synonymous with decisions, an individual decision in isolation does not constitute policy." Clearly, implementing a change in the LoI requires that policies related to teaching and learning be reviewed. Such policies include those to do with teacher training and deployment, production, and use of teaching-learning materials including textbooks and supplementary materials, testing and examinations, and value assigned to competence in African languages in terms of certification and recognition of such competence in consideration for higher education and selection for employment opportunities.

Effective implementation of language policies that expand the use of indigenous languages in education is demanding and requires input from a range of professionals and players – linguists, language development specialists, parents, community leaders, curriculum developers, materials developers, policy makers, test developers, teacher trainers and managers, and continuing professional development providers. There will be need to ensure that all these actors play their relevant roles in the change process.

Cross-References

- ▶ [Teaching for Transfer in Multilingual School Contexts](#)
- ▶ [Translanguaging in Bilingual Education](#)

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- K. Prah: [Language, Literacy and Knowledge Production in Africa](#). In Volume: Literacies and Language Education
- K. Juffermans and A. Abdelhay: [Literacy and Multilingualism in Africa](#). In Volume: Literacies and Language Education
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Bilingual Education in Aotearoa/New Zealand

Richard Hill

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Abstract

Bilingual education in the context of New Zealand is now over 30 years old. The two largest linguistic minority groups involved in this type of education – the Indigenous Māori and Pasifika peoples of Samoan, Tongan, Cook Islands and Niuean and Tokelauan backgrounds – have made many gains but have struggled

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in a national context where minority languages have low status. Māori bilingual programs are well established and have made a significant contribution towards reducing Māori language shift that in the 1970s looked to be beyond regeneration. Pasifika bilingual education by contrast is not widely available and not well resourced by the New Zealand government. Both forms continue to need support and a renewed focus at local and national levels.

This chapter provides an overview of past development of Māori and Pasifika bilingual education and present progress. For Māori, the issues relate primarily to how to boost language regeneration, particularly between the generations. Gaining greater support for immersion programs and further strengthening bilingual education pedagogies, particularly relating to achieving biliteracy objectives, are key. In the context of Pasifika, extending government and local support would not only safeguard the languages but has the potential to counteract long-established patterns of low Pasifika student achievement in mainstream/English-medium schooling contexts. Finally, the future of both forms of bilingual education can be safeguarded if they are encompassed within a national languages policy that ensures minority language development in the predominantly English monolingual national context of New Zealand.

Keywords

Maori medium • bilingual • Pasifika • immersion • indigenous

Introduction

Aotearoa/New Zealand has two main bilingual education contexts, Māori and Pasifika.¹ Both forms involve minority groups; the Māori language is the Indigenous language of Aotearoa/New Zealand, while the languages of the Pasifika people were brought to this country from the islands of Polynesia from the 1960s onwards. Both forms seek to safeguard the languages for future generations and ensure educational success of their children. However, they differ in the status their languages have in New Zealand society and the extent of language shift they have suffered. Since the Māori language is the Indigenous language, it enjoys greater state support. However, the forces of colonialism have impacted negatively upon the language and there has been more significant language shift to English as a first (and often only) language among Māori. In contrast, Pasifika languages are still spoken by a higher percentage of Pasifika people, but because the languages have been brought to New Zealand, they receive less government and local support. As such, the continued nurturing of bilingual education provisions in Aotearoa/New Zealand is necessary to secure the future of these languages and the academic achievement of their children.

¹Pasifika is the term used to describe Pacific people living in Aotearoa/New Zealand.

Early Developments

Bilingual education in Aotearoa/New Zealand commenced in the form of recognized programs in the late 1970s and early 1980s. However, the conditions that led to the need for a formal intervention were 150 years in the making, having occurred through the processes of colonization. Prior to European migration, Aotearoa/New Zealand had been the homeland of the Māori people for around 800 years (King 2003). The first British contact occurred in 1769 with Captain James Cook's arrival, which was followed by a gradual settlement of Pākehā (Europeans) to the 1830s and rapid settlement thereafter. During this early period, the Pākehā missionaries who came as part of the settlement process taught the Māori people using Māori translations of the Bible, in which Māori eagerly engaged. Seventy years after Cook's arrival in 1840, the Treaty of Waitangi was signed between the British Crown and representatives of the Māori people, which brought Māori under the control of Britain (New Zealand Ministry for Culture and Heritage 2014). The signing of the Treaty of Waitangi represented a significant event, after which the face of the New Zealand was transformed, including the patterns of language use.

The first attempts at manipulating Māori language speaking in Aotearoa/New Zealand occurred with the passing of the Education Ordinance (1847) and Native Schools Act (1867). The Education Ordinance created four principles for mission schools including the need for schools to teach religious instruction and industrial training, compulsory inspection, and the need for schools to solely use the English language for instruction. Schools were also required to be inspected by government-appointed inspectors. The Native Schools Act (1867) extended the early act by providing £7,000 for schools. In return, communities were expected to supply the land for the school, assist in the building costs, and provide a portion of the teacher's salary (New Zealand Ministry for Culture and Heritage 2014).

These early attempts to undermine Māori language use by Pākehā administrators were largely unsuccessful. However, by the turn of the twentieth century, signs of Māori language shift were appearing, and by 1930, 10 % of the Māori population no longer spoke Māori in their homes. Four decades later in the 1970s, 74 % of Māori were no longer able to speak the Māori language.

The period from the late 1970s to the 1980s was thus an important time for Māori. As minority groups around the world were becoming increasingly less tolerant of their marginalized positions and the concomitant loss of their language, Māori were also becoming actively vocal on the political stage (Spolsky 2005). Groups such as the *Ngā Tamatoa* organization of young Māori university students started to challenge non-Māori laws and to push for equal rights for Māori (Benton 1981). This activism and increasing societal awareness led to important initiatives that promoted the Māori language, the most significant being when Māori representatives lodged a claim for the Māori language with the Waitangi Tribunal, the court that considers historical injustices against Māori tribes. The Tribunal ruled that the Māori language is a *taonga* (treasure) and therefore had the right of protection under the terms of the Treaty of Waitangi (Waitangi Tribunal 1986; May 2010). This resulted in the Māori

language being made an official language in 1987. A second important initiative of this time was the emergence of kohanga reo (preschool language nests) in 1982 and kura kaupapa (Māori immersion elementary schools) in 1985.

Pacific Islands (Pasifika) Background

The same language-related pressures that Māori historically experienced were also a feature of the Pacific Islands in the eighteenth and nineteenth centuries. The church played a significant role in bringing education to Pacific communities. However, this European influence often constructed the Pacific Islands' languages as a deficit, and English language was promoted for use in education (Lotherington 2008). New Zealand's formal relationship with the Pacific Islands nations occurred early in the twentieth century, with Western Samoa, Cook Islands, Niue, and Tokelau becoming New Zealand territories. Since the 1960s, however, control has been returned, though Aotearoa/New Zealand still contributes to the governance of some Pacific nations, including the Cook Islands, Niue, and Tokelau. The people of the Cook Islands, Niue, and Tokelau also enjoy dual citizenship in New Zealand.

The migration of Pasifika communities to Aotearoa/New Zealand commenced after the Second World War and peaked during the 1960s and 1970s when New Zealand's manufacturing and service sectors were rapidly expanding (Peddie 2005). These new immigrants, who were seeking higher living standards than their home countries could offer, took up low-paid, semi-skilled jobs in New Zealand's largest cities of Auckland and Wellington. However, they struggled to survive in the low-wage, high-cost-of-living environment, and since this period, their position in New Zealand society has not improved to a significant extent. While there are signs of an improvement in the economic stability of younger Pasifika people, across the areas of education, health, and economic status, issues remain.

In 2013, the Pasifika community forms a significant section of the New Zealand community. After the European (2,969,391) Indigenous Māori (598,602) and Chinese (163,101) populations, Samoan (144,138), Cook Islands Māori (61,839), Tongan (60,366), Niuean (23,883), Tokelauan (7,176), and Fijian (14,445) are the largest groups (Statistics New Zealand 2014). Collectively, Pasifika groups make up 7.4 % of the New Zealand population. While Samoa, Cook Islands Māori, Tonga, Niue, Tokelau, and Fiji are described under the Pasifika umbrella, language and cultural differences variously suggest that they should not be treated as a homogeneous group.

Major Contributions

Māori

Māori began experimenting with bilingual education in the late 1970s in small rural schools such as Rūātoki (Benton 1981). However a more significant move occurred in 1982 after a series of meetings of elders, called *Hui kaumātua* (meeting of elders),

were held around Aotearoa/New Zealand to discuss Māori language loss (Jenkins and Ka'a 1994). This led to the opening of the first kohanga reo near Wellington, a Māori immersion preschool program where fluent Māori speakers, usually grandparents, taught Māori language and culture to children and assisted parents to learn the Māori language alongside their children. Importantly, this was an exercise of Māori *tino rangatiratanga*, or self-determination. It was a Māori initiative that was controlled and funded by Māori without state influence (Hohepa et al. 1992).

The growth of kohanga reo was brisk, with more than 400 kohanga reo opening in the first 6 years (Jenkins and Ka'a 1994). This led to a pipeline effect, with kura kaupapa Māori elementary schools emerging from 1985, the growth of partial and total immersion programs, and, more recently, wharekura (secondary schools) and wānanga (tertiary education providers). Today, students are able to study through the medium of Māori from preschool to tertiary education.

The first Māori bilingual programs were set up either completely independently of the New Zealand Ministry of Education (kura kaupapa Māori) or within the existing education legislation of mainstream English programs (immersion and bilingual programs). This was to change with the passing of the Education Act (1989) when kura kaupapa were given formal status under the principles of the Te Aho Matua document and were provided full funding in the same way as other New Zealand schools. Today, all Māori bilingual programs are state-funded, free forms of education open to all New Zealand students. They are divided into five levels according to the quantity of target language instruction (see Table 1). Level 1 programs with 81–100 % Māori instruction include kura kaupapa Māori, immersion, and kura-a-iwi (tribal schools). These programs share many characteristics; kura kaupapa base their learning programs on the principles of the Te Aho Matua document and are supported by the Māori organization *Te Rūnanga Nui o Ngā Kura Kaupapa Māori o Aotearoa*. Kura-a-iwi (literally meaning “school of tribes”), as the name suggests, are special character schools that align their programs to a particular Māori tribe. Immersion programs are schools or units within English-medium primary schools where students are taught predominantly through the Māori

Table 1 Number and percentage of Māori students involved in Māori bilingual programs in Aotearoa/New Zealand in 2013

Māori language instruction level and percentage of Māori language instruction	Titles	Number of Māori students	Percentage of the total population of Māori students
1 (81–100 %)	Māori-medium programs	11,930	6.8
2 (51–80 %)		4,945	2.8
3 (31–50 %)	Māori language in English medium	4,261	2.4
4a (12–30 %)		4,024	2.3
4b (>3 h per week)		13,374	7.6
5 (<3 h per week)		31,068	18.0
	Total	69,602	39.9

Source: New Zealand Ministry of Education (2015)

language (New Zealand Ministry of Education 2014a). Level 2–5 programs are also collectively referred to as bilingual programs because they offer specialized instruction in Māori within English-medium schools (Ministry of Education 2015).

Since 2013, the Ministry of Education has altered the titles used to describe Māori language education programs. Whereas prior to 2013, all bilingual schools were termed *Māori-medium*, today this title is confined to Level 1–2 programs (50 % instruction or above in Māori), while Levels 3–5 are now referred to as *Māori language in English-medium* programs. Programs with over 50 % Māori language instruction (Māori-medium) are expected to lead to high levels of Māori language fluency and those below the 50 % threshold act more as cultural immersion programs rather than bilingual programs per se. This distinction also accords with the international literature on bilingual education suggesting that a 50 % minimum threshold in the target language is necessary for effective bilingual instruction (May et al. 2004).

Twenty percent (9,020) of the Māori preschool population was enrolled in Level 1 early childhood programs in 2013. At the elementary and secondary school levels, 40 % of Māori students were in some form of Māori bilingual education (see Table 1). However, most were enrolled in Levels 4b and 5 programs that provide minimal Māori language exposure. Students enrolled in Level 1 programs, the most effective form in New Zealand, numbered 12,028 students or 6.8 % of the Māori student population.

The language teaching arrangements in Māori-bilingual programs can be divided into two forms, those that instruct the curriculum predominantly through the Māori language and those that do not. Level 1 programs tend to be the only form which offer a genuine bilingual learning context. They instruct students solely through the medium of the Māori language across all of the curriculum subjects for at least the first 4 years of elementary school and often 6 years. At this point, English language instruction is introduced for between 1.5 and 4 h per week, but its implementation is carefully arranged to prevent English from permeating the Māori immersion environment by housing the programs in separate classrooms and employing separate teachers. By contrast, Level 2–5 programs predominantly teach curriculum content through the English language, with Māori language content occurring incidentally. As a consequence, their graduates seldom develop high levels of bilingual proficiency.

Pasifika Bilingual Programs

Like Māori-bilingual programs, Pasifika programs are divided into five immersion levels according to the quantity of target language instruction. However, unlike Māori programs, they do not receive additional funding and language resources as bilingual schools. Pasifika bilingual education first appeared in Aotearoa/New Zealand in 1987 during the period of the rapid expansion of Māori bilingual programs. The first two Pasifika bilingual programs were Samoan, which opened at Clydemore and Richmond Road schools in Auckland. Since then, there

has been an expansion of predominantly Samoan language programs, while programs for other Pasifika groups have struggled to establish themselves.

In 2013, Level 1 preschool programs (81–100 % immersion) enrolled between 9 % and 14 % of all Pasifika students in Samoan, Tongan, Niuean, or Tokelauan programs. Cook Islands Māori enrolled 3.1 %. At elementary and secondary school level (see Table 2), support for bilingual education was significantly lower, with no programs having enrolments that exceeded 3 % of the Pasifika student population. The Samoan community were the best supported with 12 programs at Level 1 (464 students), 13 at Level 2 (604 students), and 27 at Levels 3 and 4 (1,276 students). The Tongan language was not represented in Level 1 programs but had three programs at Level 2 (162 students) and five programs at Levels 3 and 4. Cook Islands Māori bilingual education was taught in one program at Level 2 (12 students) and three programs at Levels 3 and 4 (87 students). Only one program taught the Niuean language (79 students) at Level 4 (New Zealand Ministry of Education 2014b).

These statistics paint a bleak picture for Pasifika language maintenance, particularly as a high percentage of families opt out of bilingual programs when they transition from preschool to elementary school. The lack of Level 1 and 2 programs across the range of Pasifika languages, other than Samoan, is also an issue. This means that in a predominantly English speaking Aotearoa/New Zealand, Pasifika communities will need to increasingly rely on their homes and families to maintain their languages. Unfortunately, a growing number of New Zealand-born second-generation Pasifika children are not being exposed to their languages, which will inevitably lead Pasifika groups to occupy the same situation as Māori had in the 1970s, fighting to bridge a language intergenerational gap in the community (McCaffery and McFall-McCaffery 2010).

Work in Progress

Māori

Thirty years since the first examples of bilingual education in Aotearoa/New Zealand, Māori bilingual education is well established. A new Māori-medium curriculum document, called *Te Marautanga o Aotearoa* (New Zealand Ministry of Education 2008), is currently being implemented in Level 1 programs. Unlike the first Māori-medium documents that appeared in the 1990s, it is not a translation of the mainstream (English-medium) curriculum documents, having been written in conjunction with a group of Māori educators. The number of teaching resources has also improved considerably in recent years. There is now a wide range of children's graded readers, teacher curriculum resources, dictionaries and websites (see for example, New Zealand Ministry of Education 2014c) dedicated to Māori-bilingual students.

There are also positive signs that Māori bilingual education is raising Māori school achievement levels. Murray (2007) and Wang and Harkess (2007) provide

Table 2 Number and percent of Pasifika students of the total Pasifika student population learning Pacific languages in New Zealand schools in 2013

Pasifika languages represented in bilingual programs	Number and percentage of Pasifika students in Level 1 (81–100 %)		Number and percentage of Pasifika students in Level 2 (51–80 %)		Number and percentage of Pasifika students in Level 3 (31–50 %)		Number and percentage of Pasifika students in Level 4 (12–30 %)	
	N	%	N	%	N	%	N	%
Samoan	464	1.4	604	1.8	407	1.2	869	2.6
Cook Islands Māori	0	–	12	0.1	1	0.009	86	0.82
Tongan	0	–	162	0.93	173	1.0	181	1.04
Niuean	0	–	0	–	0	–	79	2.0
Tokelauan	0	–	0	–	0	–	0	–
Total	464	1.4	778	2.8	581	2.2	1,215	6.46

Source: New Zealand Ministry of Education (2014b)

high school examination data showing the positive Māori and English literacy achievement results of Māori-bilingual students in the National Certificate of Educational Achievement (NCEA) that all New Zealand students study towards in grades 11–13 (15–18 years). Murray's comparison of Māori-medium (Level 1) students and bilingual students (Levels 2–4) in 2005 found that 90 % of both groups met the English literacy requirements for NCEA Level 1 in grade 11. The majority of grade 11–13 students of both groups also gained credits in Māori, English, and mathematics. Wang and Harkess (2007) compared year 11–13 Māori-bilingual student achievement with Māori students in English-medium schools over a 3-year period from 2004 to 2006. They found that Māori-bilingual students were more likely to pass NCEA at each level than their peers in English-medium schools and were more likely to meet the University Entrance requirements by the end of Grade 13. This aligns to findings of research into effective bilingual education (for example, Thomas and Collier 2002).

Other positive changes have occurred in the attitudes of New Zealanders towards the Māori language. Three surveys conducted by the Ministry of Māori Social Development in 2000, 2003, and 2006, each with 1,500 participants, found that Māori respondents' attitudes to Māori being spoken in public places and at work increased from 68 % in 2000 to 94 % in 2006, while attitudes of non-Māori also rose from 40 % in 2000 to 80 % in 2006 (Te Puni Kokiri 2006).

The treatment of English language in Level 1 Māori-medium schools is another area where positive changes have occurred in recent years. In its early years of development, Level 1 programs, including kura kaupapa and total immersion programs in mainstream (English-medium) schools, pursued a Māori language revitalization aim which translated into providing early and maximum exposure to Māori language with no thought towards English instruction. English language instruction during this period was viewed as a barrier towards Māori language revitalization, having been the language that displaced the Māori language. If English lessons did occur, they were implemented at the end of elementary school, by separate teachers, in separate rooms, and sometimes were required to be conducted outside the school grounds. English learning, it was felt, would be naturally acquired by students in the English-speaking environment outside school. In this sense, Māori-medium schools were designed as Māori language safe havens (May and Hill 2005).

Since this early period of development, and often as a result of parental pressure, there are signs of a change regarding the place of English language instruction in Level 1 Māori-medium programs. The hours of English instruction have started to increase, and for the first time, schools must show the English language progress of students as outlined in the Māori curriculum. There are positive academic signs in schools that embrace a biliteracy principle (Hill 2011). However, the position of the English language is still sometimes at odds with the objective of achieving bilingual and biliteracy aims. Some elementary schools continue to expose their students to as little as 1.5 h of English instruction per week for solely the final 2 years (grades 7–8) of elementary school, which translates to a 98 % Māori language instructional environment. The marginalized position of English also conflicts with a growing amount of New Zealand research drawing attention to the issue (Berryman and

Glynn 2003; Hill 2011; Tamati 2011; Hill and May 2013) and international research promoting a softening of the rigid separation of languages via approaches such as translanguaging (García 2009).

An analysis of the history of the Māori community's attempts to regenerate the Māori language provides some light on schools' reluctance to bring English and Māori closer together. Schools have been fighting to reclaim Māori language speaking contexts for more than 30 years and continue to be the key places where Māori language exposure can be controlled. As such, schools' reluctance to include English is understandable, particularly as English is the language of status in the wider New Zealand community and the language students predominantly use when they are outside the school gates. However, further experimentation with methods such as translanguaging is required to support the only New Zealand research in this area to date by Lowman et al. (2007), which found positive biliteracy effects in grade 7 and 8 for partial immersion (Level 2) students when they were exposed to translanguaging techniques. Further investigations in New Zealand research would help to clarify this issue, and it may be that translanguaging could become a new tool for deepening students' knowledge of both Māori and English.

Pasifika

There has been little progress made in Pasifika bilingual education in recent years. In fact, there has been a reduction of educational services to support Pasifika bilingual education. One lost opportunity to assist not only Pasifika languages but also the other languages of New Zealand occurred in the early 1990s when the government attempted to establish a national languages framework. In 1990, Jeffrey Waite was commissioned to gather New Zealanders' views about their language needs from which he wrote a discussion document. The document, called *Aotearoa* (Waite 1992), brought the languages of Aotearoa/New Zealand under the key areas, including Māori language revitalization, ESL (child and adult), first language maintenance, adult literacy, and international languages expansion. It was a progressive document at the time that reflected a positive view about maintaining and nurturing languages and literacy across the population, including bilingual education. Unfortunately, it was never developed further because of a change of government and the subsequent cancellation of the project (Peddie 2003). This legislation represented a significant move that could have had a positive impact on languages in Aotearoa/New Zealand particularly for Pasifika communities. While the development of language policy lost momentum for a time, there have been a number of independent initiatives that adds momentum for new legislation to be passed. The New Zealand Human Rights Commission (2008) developed a proposed national languages policy that represents a move in the right direction. This includes the provisions to safeguard the Māori language, Cook Islands Māori, Niuean, Tokelauan, and other Pacific languages; the encouragement of people living in Aotearoa/New Zealand to learn languages; and for immigrant families to be supported in maintaining their languages. Finally, it provides English language learning

opportunities for new migrants and refugees and makes language interpreters available in all public agencies (Royal Society of New Zealand 2013).

Problems and Difficulties

Both Māori and Pasifika language educators face significant issues in safeguarding their languages in a context where English is the dominant language and minority languages have low status. The issues for Māori and Pasifika communities are slightly different, however.

Māori

While Māori bilingual education has been successful in slowing Māori language loss, the percentage of students enrolling in Level 1 programs is only 6.8 % (11,930) of the total Māori student population attending school in Aotearoa/New Zealand. Indeed this low percentage is insufficient to regenerate the Māori language to pre-1970s levels. Level 2–5 programs educate 33 % (57,672) of Māori students, most of whom are enrolled in Level 5 programs offering minimal Māori language instruction. This means that the majority of students within Māori-bilingual programs contribute minimally to the health of the Māori language.

In the wider community, the number of people who speak Māori in Aotearoa/New Zealand and the size of the pool of highly fluent speakers have also been dropping. The latest New Zealand Census in 2013 revealed that 21.3 % (125,352) of New Zealanders are able to “hold a conversation about a lot of things” in Māori which is 4.8 % lower than the 2006 Census results. Furthermore, the same Census shows that the most fluent speakers of Māori are now aged over 65 years (Statistics New Zealand 2014). This means that the highly fluent speakers who are now Māori elders are not being replaced by younger generations with similar fluency levels.

Reestablishing the Māori language in the home is one area that has been less successful in the Māori regeneration effort. The issue of home language maintenance was explored in the report, *Te Reo Mauriora*, by a group of Māori language experts brought together by the New Zealand government to report on the health of the Māori language and ways forward (Reedy et al. 2011). The report’s key recommendation concerned the need to decentralize the Māori language management model that has previously given responsibility for Māori language planning to the Ministry of Education. The new model would thereby give greater powers to Māori tribes for the health of their language and to facilitating a focus on family intergenerational transmission alongside education.

A final issue the Māori-bilingual sector faces is maintaining a pool of highly fluent Māori speaking teaching staff. There has been an historic shortage of suitably qualified staff for Level 1 programs in particular, as they have heavily relied on teachers who are second language speakers of the Māori language, most of whom

have learned the Māori language as adults. Because of the low Māori teacher supply, a moratorium on processing applications for new kura kaupapa Māori was called in 1999 (Te Moni, personal Communication, October 7, 2014). Since this halt, additional schools have been opened but there remains a teacher shortage that is not monitored closely by the Ministry of Education. If numbers of teachers were to increase, not only would it support Level 1 Māori-medium programs but could potentially support the schools working at Level 2 which currently do not provide significant levels of Māori instruction. However, the key issue of the level of fluency among teachers in the current programs remains unclear.

Pasifika

The bilingual education needs of Pasifika students living in Aotearoa/New Zealand requires urgent support as there are signs that not only are these languages unstable in Aotearoa/New Zealand but also in some of the Pacific Islands nations. For example, the New Zealand population of Cook Islands Māori speakers is now larger than those living in the Cook Islands, yet few Cook Islands children grow up learning their language. In Tokelau also, the population is 1,200, yet 7,000 Tokelauans live in Aotearoa/New Zealand (Human Rights Commission 2012).

Within Aotearoa/New Zealand, Pasifika language shift is already having an effect on New Zealand-born Pasifika people (Bell et al. 2000). The 2013 national census revealed that the overall number of Pasifika languages speakers continues to decline. Few New Zealand-born Niueans, Tokelauan, and Cook Islands Māori learn to speak their languages, and most do not have access to Level 1 bilingual programs, as discussed previously. McCaffery and McFall-McCaffery (2010) estimate that while 50 % of Pasifika people still speak their languages, the percentage of New Zealand-born Pasifika people will now be closer to 25 %.

An impediment to extending support for Pasifika bilingual programs in New Zealand concerns its funding. Since 2008, the New Zealand government ceased publishing graded school readers and support materials in the Pasifika languages. This marked a change in government perceptions, favoring a more hands-off approach to funding Pasifika bilingual programs. A Radio New Zealand interview with the then Minister of Education, Hekia Parata, illustrates the Government's position regarding Pasifika bilingual education:

The first responsibility is that these communities are themselves interested in and engaged with our own languages and are speaking them in the homes and in informal community situations. Schools can support that work, but should not be the main carriers of it. (Parata 2013)

The Minister's perspective reflects a home/community responsibility model to Pasifika language maintenance. Of particular concern is a failure of the government to acknowledge the benefits that bilingual education could provide Pasifika students. Instead, the government focus has been on English language attainment, with no link

to existing Pasifika languages, which is reflected in the most recent Pacific Education plan (see May 2010; New Zealand Ministry of Education 2012).

The most recent 2013–2017 Pacific Education plan offers rhetorical support for Pasifika languages by stating that it aims for students to be “secure and confident in their identities, languages and cultures.” However, it then limits bilingual education support to early childhood programs. The sole reference to Pasifika languages in elementary and high schools is in relation to support for English language acquisition. This reflects a transitional view of bilingual education where students’ first languages are seen solely as mechanisms towards learning English (New Zealand Ministry of Education 2012). The consequence of the New Zealand government’s stance, according to Harvey (2014) is clear:

What we see is those children leaving New Zealand schools with only one language effectively and that’s English. And that’s enormously inefficient for an education system to be drawing in children that have bilingual capabilities and turning them out monolingual. (p. 1)

This subtractive position of the New Zealand government towards Pasifika bilingual programs also contradicts international research showing transitional programs to be ineffective at raising academic outcomes of minority students (for example, Thomas and Collier 2002) and New Zealand evidence demonstrating the positive effects of well-managed high-level bilingual programs (see McCaffery and Tuafuti 2003; Hill 2011).

Future Directions

Pasifika

The subtractive position adopted towards Pasifika bilingual education needs to change to an additive view that acknowledges the place of minority and Indigenous languages for supporting school achievement (Glynn 2003). The situation highlights a contradiction in current policy views between Pasifika and Māori bilingual education, as discussed in the last section. On the one hand, Māori bilingual education is acknowledged as a means of supporting Māori language development and student attainment, yet, on the other, Pasifika bilingual education is ignored. While the status of the two forms differ, with the Māori model involving the Indigenous language and Pasifika languages having been imported, there remains a strong argument for Pasifika bilingual education to be supported by the New Zealand state. Not only are Pasifika groups citizens of Aotearoa/New Zealand, with a shared history and important place in this country, but as discussed in the previous section, there is significant research demonstrating the advantages of additive bilingual education on student achievement in mainstream English-medium programs. In the context of New Zealand, Pasifika students are among the lowest performing groups, as evident in international studies such as Progress in International Literacy Achievement (PIRLS) and Program for International Student Assessment (PISA) (Organisation for Economic Co-operation

and Development [OECD] 2014; Mullis et al. 2012). There is thus a strong case for bilingual education as a means of lifting Pasifika attainment, rather than the current focus on English language attainment in mainstream English-medium programs.

Māori

Thirty years since the first students entered kohanga reo, a new generation of parents is sending their children to these schools to ensure that momentum for language regeneration is not lost. The first kohanga reo and bilingual education parents were the pioneers of Māori bilingual education. Being educated in these environments has meant that their children have been sheltered from the issues of language revitalization and have benefitted from their parents' ambitions. However, they may not have the same level of commitment to Māori bilingual education as their parents.

As such, a new threshold needs to be crossed to increase the momentum that was generated when kohanga reo first appeared in the 1980s. This must include having strategies to encourage families to commit to more intensive immersion programs that lead to high Māori fluency levels. Schools must continue to raise their standards. Those Level 2–4 programs that do not live up to their Māori language instructional levels must build their programs to a level that will enable students to emerge as fully bilingual and biliterate. This will require teachers to build their personal Māori language competencies in order to enable them to teach bilingually. Schools will also need to ensure that their programs provide academic benefits in both languages without compromising either of them.

To be successful, greater government engagement and monitoring of progress is required to ensure that Māori-medium schools reach high levels of student achievement. This has implications for teacher training. Greater numbers of qualified teachers who are highly fluent Māori speakers and knowledgeable about bilingual teaching pedagogies are required (May et al. 2004). The change in the governmental approach towards a more decentralized model that gives more control to the tribes will form a new stage in Māori language development. At this early stage, prior to its full implementation, its potential is not clear. However, the challenge of language regeneration will remain significant, as most contexts which have embarked on the path to language regeneration have had variable success (Spolsky 2005).

This discussion regarding Māori and Pasifika bilingual education in Aotearoa/New Zealand demonstrates the significant gains but also the issues that minority communities continue to experience because of past colonization processes. The Māori people were colonized much earlier and suffered more severe language and resource losses but have made significant gains despite this. Pasifika people were also a colonized group, but more so in their own countries. As groups who migrated to Aotearoa/New Zealand, they do not share the same rights as the Indigenous Māori people but should still have the right to learn through their languages. As it has been discussed, investing in bilingual education not only helps nurture languages, it can also promote the academic achievement of students.

Overall, this chapter has highlighted the need to protect, maintain, and expand the educational provision of Māori-medium education, along with bilingual programs for other languages, as a key means of safeguarding them. This can occur through the implementation of a national languages policy, as argued by Waite (1990) and the Royal Society of New Zealand (2013). Not only would this help to safeguard the future of bilingual education in this country, it would assist in moving New Zealand towards becoming a more pluralistic and multicultural nation in the twenty-first century.

Cross-References

- ▶ [Biliteracy and Multiliteracy in Bilingual Education](#)
- ▶ [Bilingual Education: What the Research Tells Us](#)
- ▶ [Language Rights and Bilingual Education](#)
- ▶ [Translanguaging in Bilingual Education](#)

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Bilingual Education in Australia

Joseph Lo Bianco and Yvette Slaughter

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Abstract

The Australian experience of bilingual education is composed of three separate audiences: Indigenous groups and their languages, immigrant groups and their languages (both of these groups seeking language maintenance and intergenerational vitality), and mainstream English speakers seeking additive language study. All these interests share a common aim of lobbying for more serious and substantial language education programs, but differ significantly in

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the purposes and context of their promotion of bilingual education. This chapter provides an overview of historical, political, and educational influences on forms of bilingual education that have emerged, in the context of state and national language policy and practices, to meet the needs of Indigenous Australians, migrant communities, and Anglophones.

Keywords

Bilingual education • Australia • Indigenous languages • language rights • Language policy • Language maintenance

Introduction

During the past 40 years, deep transformations to the demographic and economic landscape of Australia have stimulated intense multilingual policy activity. Since the early 1970s, language policy has often functioned as a tool of national reconstruction, focusing on broad social aims at different times, for “multiculturalism,” “Asia literacy,” “globalization,” “international economic competitiveness,” or “Indigenous reconciliation” (see Lo Bianco and Slaughter 2009, 2016; Lo Bianco and Aliani 2013).

Despite inconsistent aims, changing priorities, and inadequate implementation, the overall result of this stream of ambitious and occasionally well-resourced policy making has been a multilingual practice through which teaching and examining occur in some 100 of Australia’s 300 spoken languages (Clyne 2005), languages categorized as international, immigrant, or Indigenous. International languages historically were the prestige Europeans (French, Latin, and German) but today are Asian trade languages: Chinese (Mandarin), Indonesian, and Japanese, occasionally also Hindi and Korean. Although mostly promoted as though their speakers are foreigners, all are present within the Australian population. Such domestic multilingualism involves what are called “community languages” broadly equivalent to what others call “heritage languages.” All have local speaker populations who typically advocate for intergenerational language retention, but by definition have linguistic settings outside of Australia, while Indigenous languages have been unique to the Australian continent for millennia.

The bulk of education programming involves teaching languages as a timetabled school subject, a practice reinforced from 2014 with the adoption of Australia’s first national curriculum. The most persistent and sometimes dramatic question in bilingual education concerns Indigenous languages – specifically the role of traditional languages in how general education, English learning and literacy teaching for Indigenous Australians,¹ should be imparted.

¹The term “Indigenous” refers to both Aboriginal Australians and Torres Strait Islanders.

This chapter provides an overview of historical, political, and educational influences on forms of bilingual education that have emerged, in the context of state and national language policy and practices, to meet the needs of Indigenous Australians (variously multilingual speakers of unique languages, dialects² such as Aboriginal English, creole languages such as Kriol and mixed languages such as Gurindji Kriol and Light Warlpiri (Meakins 2014)), migrant communities, and Anglophones.

Early Developments

Bilingual Programs in Australian Schools

With instructions from King George III to establish a British Colony, Captain Arthur Phillip and the “First Fleet” of 11 ships and 1,350 people landed at Botany Bay in January 1788 (Welsh 2004). The subsequent struggles to establish permanent settlement and expand colonization to incorporate the entire land mass of Australia involved massive dislocation of the Indigenous peoples, importation of large numbers of convict and then free settlers, and the creation of institutions and expansion of cities (Hughes 1996). By the 1860s, in addition to around 250 Indigenous languages,³ a multitude of immigrant languages were present, with Irish, German, Chinese, Gaelic, Welsh, French, and Scandinavian languages and Italian predominating (Dixon 1989; Clyne 1991). As the century proceeded, gold and wool industries produced a booming economy and burgeoning population, but also stoked moves toward unification of the six self-governing British territories, culminating in a series of conventions and referenda during the 1890s and ultimately in 1901 political federation as the Commonwealth of Australia (Macintyre 2009).

Nineteenth-century society consisted of Indigenous communities, immigrant settlers and convicts, and native-born Europeans, mostly of British or Irish origin, but also from Africa, Asia, Europe, and South America. However, in this context of rapid settlement and institution creation, an absence of overt language policy permitted broadly tolerating practices, at least for non-Indigenous groups. Demographic diversity was expressed in various forms of bilingual education from the 1850s, with programs mostly designed for individual ethnic or religious groups, some of which attracted large enrolments from children of English-speaking

²In Australia, the use of dialect for Aboriginal English is non-pejorative and widely used. The term English as an additional language or dialect (EAL/D) has replaced the term English as a second language (ESL) in the Australian curriculum.

³Many Indigenous languages did not survive the colonization of Australia. Languages that are not used in everyday communication are considered to be “sleeping” by Indigenous Australians. While linguistically, languages can be categorized as “extinct” and “dormant,” these categorizations are challenged by that of another – “reawakening,” as demonstrated by L2 speakers of Daungwurrung and Kaurna. (see <http://www.ethnologue.com/country/AU/status>; also based on reviewer comments).

families, so that by 1900, over 100 bilingual schools (French, German, Hebrew, and Gaelic) operated throughout the colonies (Clyne 1991).

Despite the immense diversity of Aboriginal languages and their linked education systems which together encompass “a broad range of practical, spiritual and cultural skills” (Barry 2008, p. 241), colonial administration repudiated any understanding of the ancient Indigenous presence in Australia as a unique human civilization. Instead, all education was premised on the overriding aim of “civilizing” the Indigenous populations “by inculcating Christian habits and the wider values of Europeans” (Beresford 2012, p. 83). While missionaries also embraced this “civilizing” mission, their more specific aim was inculcating Christian faith, and although vernaculars were sometimes utilized in the complex trajectories between colonizers and colonized (see, e.g., Mills 1982; Barry 2008; van Toorn 2006), there is little evidence of any formal Indigenous language bilingual education during the nineteenth or the early twentieth centuries.

Population control dominated early Federation politics, with adoption of the Immigration Restriction Act of 1901 (White Australia Policy), progressively compounded by rivalry and war between Britain and Germany. Empire loyalty among many Australians and active participation in battlefields in France and Turkey, however, stoked independence-minded nationalism even as it provoked enactment of legislation in several states to curtail German bilingual education, effectively ending the previous tolerant approach toward ethnic and linguistic difference. Promotion of English monolingualism, modeled on Southern British norms, continued uninterrupted until the 1947 postwar immigration program which injected a vast new settler population drawn from non-English sources. By that stage, however, xenophobia allied to patriotism which resulted in closure of bilingual schools and a decisive shift against linguistic pluralism (Clyne 1991).

Major Contributions

Postwar Migration

Under Prime Minister Ben Chifley and Immigration Minister Arthur Calwell, in 1947, the Commonwealth government commenced a vast population growth scheme under the slogan “populate or perish.” The aim was to increase the population by one percent annually from immigration, with 9/10 of new arrivals to be British. The one percent target remained until 1972, reduced by the Whitlam government, which also removed national origin discrimination, thereby ending the White Australia Policy. By the late 1990s, the scheme generated over 6.5 million new permanent settlers. Between 1953 and the late 1960s, southern Europeans exceeded British arrivals, financial favoritism after 1968 restored the British primacy until the mid-1980s when Vietnamese or Indo-Chinese arrivals became the largest national origin, and since 1983, English-speaking arrivals have been significantly below Asian immigration (ABS 2013; Price 1998).

Considerable pressure was applied to European migrants to discard their cultures and languages and rapidly assimilate (Clyne 1991), but activist second-generation European Australians were ultimately catalysts in the expansion and development of multilingual services and education policy (Ozolins 1993), transforming the wider national context of bilingual education. Under their pressure and leadership, bilingual programs reemerged in the education landscape during the early 1970s.

Indigenous Bilingual Education

Indigenous bilingual education required a separate struggle around citizenship rights and recognition, civil activism by both urban and rural Indigenous people and their supporters around fundamental rights such as land rights, wage parity, and access to government financial services, as well as demands to remain connected to their languages and culture (Maynard 2007). In education, Indigenous children had endured decades of extreme assimilationism, taught to read and write exclusively in English under curricula that provided little acknowledgment of their cultural backgrounds. Claims for incorporation of Indigenous vernaculars informally in early grades to improve learning effectiveness were usually repudiated with arguments that improved learning outcomes required rigorous application of English-only teaching (Mills 1982; Harris and Devlin 1997).

In 1972 a radical move by Prime Minister Gough Whitlam saw the introduction of bilingual teaching for Indigenous children in the Northern Territory; from 1973, five schools introduced bilingual education, expanding quickly so that by 1981, half of enrolled Indigenous primary aged children were receiving bilingual teaching in one of 13 languages, with smaller numbers in other states (Mills 1982). Even these early innovations were accompanied by vacillation and cautions from state and national officials about the overriding primacy of English literacy, hesitancy which has regularly impeded full implementation of bilingual education. After achieving self-government in 1978, the Northern Territory modified the educational and linguistic aims of the bilingual programs it inherited to stress their exclusively transitional role as a bridge to English-mediated learning, distancing language maintenance from the core purposes of the programs. The “step” approach it adopted involved instrumental use of vernacular literacy in the early years, accompanied by oral English support and full introduction of English literacy by Year 4, but regular modifications continually shifted the focus to English (Simpson et al. 2009; Devlin 2011; McKay 2011).

Bilingual programs were destabilized by inadequate program costing, high non-Indigenous staff turnover (up to 100 % annually) and regular absenteeism among Indigenous support workers, who were critical for the success of team teaching. A shortage of trained Indigenous teachers, slow orthographic development and literature production, absent agreement on terminology, and irregular attendance by students also impacted bilingual programs negatively, compounded by high family mobility; endemic poverty; health problems, especially ear and hearing illnesses; and even community violence (Simpson, et al. 2009).

With increasing national focus on English literacy as a priority for educational intervention from the late 1990s and ongoing negative discourse around bilingual education from some political corners, in 1998, the Northern Territory government attempted to abolish bilingual programs. In response to vocal opposition and petitioning, a report was commissioned into program “viability.” The report, *Learning Lessons*, showed strong community support for their continuation and demands for appropriate teacher training in bilingual methodologies. The report also proposed modification to the contested concept of “bilingual education,” suggesting its replacement with “two-way learning” (Simpson et al. 2009). The Northern Territory government adopted two-way learning, but no other recommendations. Though broadly similar to the preceding bilingual programs, two-way programs, according to Simpson et al. (2009), were essentially watered-down versions of bilingual programming.⁴

Most Indigenous children enter education as speakers of creoles such as Kriol, mixed languages such as Gurindji Kriol and Light Warlpiri (Meakins 2014) or dialects such as Aboriginal English and therefore are learners of English as an Additional Language or Dialect (EAL/D). Few Indigenous children in remote contexts have extended exposure to Standard Australian English (SAE) or full knowledge of a traditional language, and yet many teachers lack training in appropriate EAL/D methodology (Simpson et al. 2009). This deficiency in how English is taught, and how complex multilingual/multi-dialectalism is understood, impacts on effectiveness of bilingual approaches. Along with the introduction of two-way programs, support for English as a second-language/dialect services was disastrously decreased, so that bilingual education was prepared for eventual closure.

Even when recognition of Indigenous rights was achieved through litigation or referenda, it was hampered by administration and implementation. The most significant was the foundational case for native title, the 1992 *Mabo v Queensland* ruling, a landmark decision of the High Court. The *Mabo* decision recognized that a state of unextinguished native land title survives British colonial claims to the entire Australian continent, based on rejection of the doctrine of *terra nullius* – that the land belonged to no one when the British arrived. Native title preexisted British occupation, and its continuity is now established through cultural connection to land, often through continuous use of Indigenous language, culture, and law.

Erosion of programs can occur even under supportive policy, via language prejudice entrenching an elevated status of Standard English over traditional languages (Truscott and Malcolm 2010), practices which serve as invisible language policy privileging monolingualism or ranking some bilingualisms above others, or misunderstanding of language sequencing, and integration of cognitive functioning across languages, which are key premises on which bilingual education is based. Sociolinguistic complexity compounds the delivery of bilingual education when the latter is assumed to involve discrete languages, evident in the failure of curricula, and

⁴It should be noted that two-way learning has been adopted and valued differently in Western Australia (Truscott 2016; Sharifian et al. 2012).

assessment to recognize that many Indigenous students are English as a second-language/dialect learners.

Beyond the Northern Territory, other states have introduced and supported Indigenous languages teaching, occasionally in bilingual mode, especially the largest states, New South Wales and Victoria, and in the national curriculum, an Indigenous languages framework is a major achievement. Despite these efforts, Indigenous language programs remain fragile and vulnerable within any education jurisdiction (McKay 2011).

The Development of Bilingual Programs for Migrants and Majority Speakers of English

Alongside Indigenous activism for bilingual education rights, a parallel and much larger activity on behalf of bilingual schooling was a direct consequence of the settlement/citizenship basis of postwar migration. The sheer number of new arrivals led to the society-changing movements of multicultural, non-assimilationist policies that have since shaped general language policy. With thousands of migrant children from non-English backgrounds entering schools, education planners turned from “foreign” language teaching to responding to the urgent need to maximize immigrant children’s general education, English, and first or home language knowledge. The general educational presence of foreign language teaching was affected by these moves, though such programs of cultural enrichment and development of linguistic skills for monolingual English-speaking students remained.

Through the 1970s and 1980s, numerous forms of bilingual education were developed, although significant regional differences became evident.⁵ A number of transitional programs, where students begin schooling in their home language, transferring to English-medium schooling close to the middle primary years, were introduced in Catholic schools in South Australia (Italian), New South Wales (Greek and Macedonian), and Victoria (Italian, Croatian, and Maltese). Several Greek programs were also initially set up in Victorian government schools (Mills 1982), later expanding to include Auslan (Australian Sign Language), Chinese (Mandarin), Macedonian, and Vietnamese. However, many were intended to support English acquisition, rather than valuing and developing the emerging bilingualism of students. Other groups set up community-owned “independent” schools, some with religion as an integral part of their mission, including Greek Orthodox and Jewish schools with partial, full, or late bilingual immersion streams (Mills 1982).

These innovations were challenged by many of the same factors impacting on Indigenous bilingual programs. The mobility of migrant communities decreased speaker concentration and threatened program viability. Parental desire for early demonstrations of English proficiency created pressure for rapid transition out of home languages, limiting the time to develop mother tongue literacy and numeracy.

⁵See Mills (1982) for a full overview of language programs and models at this time.

Staff turnover was also high as many teachers were themselves members of mobile migrant communities or were native speakers experiencing difficulty in gaining locally accepted training and accreditation (Gibbons 1997; Mills 1982).

By contrast, mainstream bilingual programs introduced with the promise of enhanced academic attainment and “prestige” bilingualism expanded in government schools, often with assistance from foreign governments. Examples include French primary schools in Victoria, New South Wales, and the Australian Capital Territory and a German program at Bayswater South in Victoria (Mills 1982). In the 1990s, several bilingual programs were established through a Victorian government initiative on bilingual schooling, in Japanese, French, and Indonesian. By the late 1990s, there were over 100 such programs nationally, of various forms, the majority in Melbourne (Gibbons 1997). An enduring outcome of such experimentation is a strong practice of academic engagement with bilingual education and close interaction with schools in program design and evaluation, curriculum innovation, and documentation of students’ linguistic and cognitive development, on writing, literacy, and CLIL (e.g., de Courcy and Smilevska 2012; Fernandez 1992; McKay and DEETYA 1997; Molyneux et al. 2015; Smala 2013).

The Dismantling of Indigenous Bilingual Education

By 2008, the Northern Territory bilingual education (two-way) programs were under full existential threat, this time due to statistical demonstrations of English literacy difficulties among Indigenous learners and their mistaken attribution to bilingual teaching and claims that English literacy was being sidelined in favor of Indigenous languages (Devlin 2011; Simpson et al. 2009). In 2007, Australia’s first national literacy and numeracy tests were conducted with students in Years 3, 5, 7, and 9. NAPLAN (National Assessment Program – Literacy and Numeracy) is a norm-referenced test of English literacy and numeracy, whose results confirmed “that Indigenous children in remote schools were not achieving acceptable standards of literacy in English and numeracy” (Simpson et al. 2009, p. 27). In a detailed analysis of NAPLAN, Wigglesworth, Simpson, and Loakes (2011) allege that the test is culturally biased: its norm-referenced basis underrepresents minority language learners, so that Indigenous children are unlikely to be familiar with many test terms and constructs, concluding that NAPLAN is “linguistically and culturally unsuitable for Indigenous children” (p. 340; see also Simpson et al. 2009). Extensive criticism of NAPLAN, with its benchmarking against linguistic and cultural norms alien to learners speaking either a traditional language or EAL/D, has had little discernible impact on policy makers or administrators. Compounding questions of cultural appropriateness was the demonstrated misinterpretation of the 2008 results (see Devlin 2011), but the political backlash against bilingual education was swift.

Immediately following release of the 2008 results, a new draft policy for Northern Territory schools was issued. The *First Four Hours* policy mandated English only during the first four hours of the school day, widely interpreted as the final closure for Northern Territory Indigenous bilingual education. The Northern Territory

government subsequently claimed that the policy continues bilingual learning because it permits vernacular communication in morning classes as required. However, Devlin (2011) argues that the bilingual programs have well-structured systematic bilingual input, supported by an involved community, professional staff, and purpose-designed materials, and the ad hoc use of vernaculars does not constitute bilingual learning.

Work in Progress

In 2012, a national report was released into how Indigenous languages could help close the education achievement gap for Indigenous Australians.⁶ *Our Land Our Languages* (House of Representatives 2012) provided a comprehensive overview of the state of Australia's Indigenous languages. Important recommendations included development of a national implementation plan in line with United Nations obligations on rights for Indigenous populations, as well as proposing important work in mandatory first-language use in assessment at early childhood level, adequately resourced and continuous full bilingual programs, and an alternative assessment to NAPLAN to accommodate dialect, culture, and language differences.

Unfortunately none of the report's recommendations have been implemented. Prior to this a *National Indigenous Languages Policy* commenting on the important role that Indigenous bilingual education plays in some schools was issued (Australian Government 2009), but since the Northern Territory's *First Four Hours* policy, it is now difficult to determine how many biliteracy or bilingual programs remain in operation. Some kind of pragmatic bilingualism in government and nongovernment schools is in evidence nationwide, and some government support continues to be provided for transitional bilingual programs⁷ (G. Dickson, September 4, 2014, "personal communication"). However, the emphasis is firmly on English-medium curriculum delivery and downgrading of Indigenous languages in delivering any serious academic content continues.

A further review of Indigenous education was released in 2014, *A Share in the Future* (Wilson 2014). This report represents yet another examination into Northern Territory Indigenous education by policy makers with little input from bilingual education specialists. Despite consultation, including numerous passionate arguments on behalf of continuation of bilingual education from local communities, the report concludes that education of Indigenous children and the entire curriculum be delivered exclusively in English, with teaching of literacy in the vernacular only where "feasible." Significant budget cuts have accompanied the downgrading of bilingual teaching, especially the reduction of the Northern Territory Indigenous

⁶See https://www.coag.gov.au/closing_the_gap_in_indigenous_disadvantage for an overview of the closing the gap in Indigenous disadvantage program.

⁷For example, the Northern Territory Education Minister's visit in August 2014 to Shepherdson College to celebrate 40 years of bilingual education at the school: <https://www.facebook.com/PeterChandlerMLA/photos/a.386004441525050.1073741826.133717516753745/559368827521943/?type=1>.

Languages Support (ILS) scheme, from \$11.1 million to \$9.5 million, a program which finances community-based activities for maintenance and transmission of Indigenous languages (Nordlinger and Singer 2014).

Support for teaching Indigenous languages in non-bilingual delivery modes remains vibrant; however, particularly as many Northern Territory schools have never been able to offer bilingual programs (Truscott 2016). Indigenous languages and cultures are taught in 60 Northern Territory government schools – programs of first-language maintenance, language renewal, second-language learning, and language awareness (House of Representatives 2012, Cap./Chap. 3).

Beyond the Northern Territory, in Western Australia, 16 Indigenous languages are taught in government schools; ten Indigenous languages are taught in 42 schools in South Australia, and Indigenous languages are studied in Queensland (both Aboriginal and Torres Strait Islander languages), New South Wales, and Victoria. Unlike the vicissitudes that have damaged bilingual programs, these “second” language teaching schemes represent substantial, long-term investments, dedicated to reclaiming and perpetuating the languages of Indigenous Australians.

Continuity of Other Bilingual Programs

The overall number of bilingual programs across Australia has decreased significantly since 2000. Many survivors have extended histories and are well grounded in local and international research. In Victoria, 12 government schools provide either transitional (1–3 years) or full (7 year) bilingual programs, either by cohort streams or by the whole school. An independent German bilingual school, Deutsche Schule and kindergarten, utilizes German and Australian curricula in Victoria, while other programs include Italian, French, and Mandarin in New South Wales and the Australian Capital Territory. Since 2010, four government primary schools in New South Wales have been offering bilingual programs within their schools, where subject content is taught through Korean, Japanese, Chinese, or Indonesian for 5–7 h a week. Reflecting long-term policy trends prioritizing Asian languages, the New South Wales Education Minister argued that with Asia on Australia’s doorstep, “the program was vital to the state’s future economic and social prosperity” (“Primary schools to . . .” 2010).

In Queensland, bilingual programs are offered in 12 schools, most in government secondary schools, such as late-onset immersion programs in Chinese, French, German, Japanese, and Spanish, in which a cohort of students receives half their schooling through the languages for a 3-year period. Smala et al. (2012, p. 374) argue that parents identify bilingual programs as “positional goods in the global competition for good jobs” and that schools are using immersion programs as “markers of distinction in the school market.” This demand is not limited to formal schooling. Across Australia, bilingual childcare centers operate in 16 languages, with access to seven more through family-based day care and official playgroups for preprimary school children in 45 languages (Nejad 2014).

Problems and Difficulties

The primary obstacle for all bilingual education has been an overridingly monolingual construction of education success. The practical outcome for both Indigenous and immigrant children has been a deleterious ranking of different kinds of bilingualism, effectively discounting social and cognitive value of bilingualism according to the social standing of the language paired with English. A systemic attitudinal and ideological problem derives from folk notions of sociolinguistics which work to represent Indigenous and immigrant children as laboring under the deficit of not knowing English, while other pathways toward bilingualism construct learners as acquirers of valued additional knowledge. These differential judgements were poignantly noted by Tom Calma, in his role as the Aboriginal and Torres Strait Islander justice commissioner:

It was somewhat of a cruel irony for me to read last week that NSW schools are to offer bilingual education in Asian languages. Yes, the NSW government is funding a four-year \$2.25 million program starting in 2010. The NSW Education Minister Verity Firth was reported as saying the program was vital to the state's future economic and social prosperity and the language lessons would start in kindergarten. These policy inconsistencies and hypocrisies are extremely disheartening for Aboriginal people. Unfortunately we are all too familiar with promises that are not kept – and governments seem to think they can get away with it. (Calma 2009, np)

Acquisition of instrumentally useful languages, regularly promoted in the media with trade and commercial associations, is validated by public discourse, receives encouragement and public acclamation, and enjoys supportive policies. For Indigenous and most immigrant children, the home language maintenance basis of bilingual education is rarely socially validated, instead being judged as a kind of remediation of disadvantage. This divergence of esteem produces policy inconsistency between disparity of treatment of Indigenous and immigrant bilingual programs and the affirmative policy making offered to majority bilingual programs.

The national social transformations that have stimulated language policy over the past 40 years have failed to generate consistent application of a nationwide appreciation of languages as cognitive, social, and cultural resources, in addition to their economic and utilitarian applications. An additional point of difficulty is lack of differentiation between learning and language learning. Policy makers and some teacher educators conflate spoken language with literacy learning, failing to account for key aspects of second-language acquisition, including syntax, vocabulary, pragmatics, and sociocultural understanding, such as cultural conceptualizations (Truscott 2016).

Future Directions

An imperative of future development is to harmonize the work of professional academic researchers, with the demand and needs of parents and communities, professional educators, and policy makers. In the lead up to the adoption of the

NPL in 1987, a coalition of professional and community groups, spanning all language interests, met regularly and managed to harmonize their disparate claims into a consolidated log of demands. The turbulent bilingual education story recounted here indicates that much more integration between research, teaching, and language policy making, along these same lines, is needed to bring about the often proclaimed policy aim of national bilingualism. The different pathways implicated in the goal of universal bilingualism must be integrated into a continuum of language education opportunities and delivered by well-designed, enduring, and well-taught bilingual education initiatives. The foundational task is a comprehensive and effective policy, linked to credible implementation, and designed with both equitable language principles and language enrichment as dual aims.

Cross-References

- ▶ [Language Rights and Bilingual Education](#)
- ▶ [Sociopolitical Issues in Bilingual Education](#)

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Bilingual Education in the Pacific Islands

Paul Geraghty

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Abstract

This chapter is concerned with bilingual education in the Pacific Islands, that is, those islands usually included in Melanesia, Polynesia, and Micronesia but excluding Irian Jaya (West Papua) and New Zealand, which are discussed in a separate chapter. It therefore does include Hawai‘i, since it is a Polynesian island group even though it is a state of the United States, and Rapanui (Easter Island),

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also Polynesian, though it is a territory of Chile. The Pacific Islands, while relatively lightly populated, contain many languages (over 1,000, so about one-fifth of the languages of the world) and have in common that the literacy and formal education in the vernacular introduced by Christian missionaries in the nineteenth century have been supplemented or replaced by education in metropolitan languages, mostly English and French, resulting in many having transitional bilingual education systems.

Keywords

Pacific languages • Language policy in education • Bilingual education

Introduction

This chapter is concerned with bilingual education in the Pacific Islands, that is, those islands usually included in Melanesia, Polynesia, and Micronesia¹ but excluding Irian Jaya (West Papua) and New Zealand, which are discussed in a separate chapter. It therefore does include Hawai‘i, since it is a Polynesian island group even though it is a state of the United States, and Rapanui (Easter Island), also Polynesian, though it is a territory of Chile. The Pacific Islands, while relatively lightly populated, contain many languages (over 1,000, so about one-fifth of the languages of the world) and have in common that the literacy and formal education in the vernacular introduced by Christian missionaries in the nineteenth century have been supplemented or replaced by education in metropolitan languages, mostly English and French, resulting in many having transitional bilingual education systems.

Historical Background

All Pacific Islands have a similar history of settlement and acquisition of literacy and education, which can be summarized as follows: settlement, discovery, early contact, missionization and literacy, annexation and linguistic imperialism, and independence and linguistic revival. Each of these stages will be expanded upon below, followed by summaries of three coordinated attempts to revive and develop Pacific languages for use in education: the University of the South Pacific’s (USP) Pacific Languages Unit, which has dealt mainly with languages of Melanesia; the language nests of Eastern Polynesia and the Polynesian Languages Forum; and the University of Hawai‘i’s efforts with the languages of Micronesia.

¹These are three convenient and familiar geographical divisions, and no claim is made here that they constitute linguistic or cultural areas.

Settlement

The first settlers of the Pacific Islands arrived in Papua New Guinea and the western Solomon Islands approximately 40,000 years ago. They are now labeled Papuans and the languages they speak are classified as Papuan² languages, a small number still being spoken in the western Solomon Islands and many in Papua New Guinea. Some 3,200 years ago a group of people now referred to as Lapita people arrived from Taiwan, via the Philippines, in the Bismarck Islands, north of New Guinea, bearing highly distinctive pottery and other material culture, along with a relatively advanced marine technology. After a while they sailed northwards, southwards, and eastwards into unexplored territory and ultimately settled in the whole of the Pacific. They spoke languages of the Austronesian language family, the most widespread language family in the world. Generally, the island groups of Melanesia in the western Pacific have, as a result of time depth and sociolinguistic factors, the highest density of languages and hence extensive bi- and multilingualism, whereas the islands of Micronesia and Polynesia, and their inhabitants, tend to be more monolingual. Beginning perhaps 1,000 years ago, some Polynesians sailed west and settled in some small islands in Melanesia and Micronesia, some of which appear to have been vacant at the time. They are called Polynesian outliers and still speak Polynesian languages, though some have been radically influenced by neighboring languages. No Pacific Island language had a traditional writing system.

Discovery

The Pacific Islands were “discovered” by European explorers mostly in the sixteenth to eighteenth centuries. For example, the Spaniards in the sixteenth to seventeenth centuries were the first Europeans to sight Papua New Guinea, the Solomon Islands, Vanuatu, Guam, parts of Micronesia, the Marshall Islands, Kiribati, Tuvalu, the Tuamotus, and the Marquesas; the Dutch in the seventeenth and eighteenth centuries discovered New Zealand, Tonga, Wallis and Futuna, Samoa, Fiji, and Rapanui (Easter Island); the British in the eighteenth century discovered New Caledonia, Rotuma, Niue, Tahiti, the Cook Islands, and Hawai‘i (Dunmore 1991). In most cases, European discovery was not immediately followed by settlement and was also of little importance to the indigenous people, as was witnessed in the relatively few oral traditions of the earliest encounters with Europeans.

²Papuan languages are non-Austronesian languages spoken in Papua New Guinea and the Solomon Islands (and parts of Indonesia). Though grouped together for convenience, they belong to a number of language families, perhaps 20-odd. Some linguists, however, do believe them to be all related, and some also believe that they are remotely related to Austronesian languages.

Early Contact

The islands of the Pacific were visited by whalers and traders in various commodities, particularly sandalwood, pearls, *bêche-de-mer* (sea cucumber, trepang), and coconut oil through much of the nineteenth century (Spate 1983). In many islands, these whalers and traders, mostly from New England (United States), Britain, France, Germany, and Australia, and beachcombers who came on their vessels were the first “Europeans” the inhabitants had significant direct contact with. Around this period an English-based pidgin developed which later evolved into the three pidgin languages of Melanesia – Tokpisin in Papua New Guinea, Pijin in the Solomon Islands, and Bislama in Vanuatu. Although it was spoken onboard European ships throughout the Pacific, and in the plantations of Queensland and Samoa, it only became a lingua franca in the islands of western Melanesia because of their relative linguistic fragmentation and lack of languages of wider communication.

Missionization and Literacy

The Pacific Islands were missionized by various Christian denominations throughout the nineteenth century, who introduced literacy, using the Roman alphabet, and set up the first schools to provide formal education using local languages (Garrett 1982). Thus it was churches, not governments, that made the earliest decisions regarding language use in education, and they chose to make it monolingual in the vernacular. In most of the islands and archipelagoes of Polynesia and Micronesia, only one language was spoken, which naturally became the language of literacy and education. However, in some parts of Melanesia, with its greater linguistic fragmentation, the missionaries selected and developed a local language as the standard – for example, the Methodists chose “Bauan” Fijian in Fiji and Roviana in the western Solomons, while the Anglicans chose Mota, spoken on a small island in northern Vanuatu, as the language of the church in northern Vanuatu and in parts of the Solomon Islands and New Caledonia. Towards the end of this period, the missionaries were increasingly Pacific Islanders rather than Europeans, so that, for instance, Papua New Guinea was mostly Christianized by Cook Islanders, Samoans and Fijians, and Tuvalu by Samoans.

Annexation and Linguistic Imperialism

Although Guam had been under Spanish rule for some three centuries, it was not until the mid-nineteenth century that most of the islands of the Pacific were annexed by or brought under the protection of western powers, mostly Britain, France, Germany, and the United States, who all colonized their new territories to some extent. Some were later placed under the administration of Australia and New Zealand and some under Japan between the world wars. From the late

nineteenth to the early twentieth century, colonial languages were introduced as media of education, to either complement or replace the vernacular, initiating the transitional bilingual education systems commonly found today.

Among the reasons for this change in medium of education were: (1) The people themselves, with their broadening world view, and associating the colonial language with the perceived superior knowledge, technology, and wealth of its speakers, became convinced that the vernacular would be of little use and demanded that their children be taught the colonial language. (2) Missions became increasingly unable to financially support the education systems they had founded, and governments took them over, so that missionary teachers, who were committed to learn the vernacular as part of their vocation, were replaced by teachers from the metropolitan countries (England, France) or English-speaking colonies (Australia, New Zealand) who had little inclination to learn the vernacular. (3) These same teachers believed that Pacific vernaculars were inadequate for modern education, inhibited the acquisition of the colonial language, and would soon become extinct; these views were accepted by the early generations of indigenous teachers. (4) The cost factor: training of teachers and the production of educational materials in vernacular languages was (and is) far more costly, in personnel and in financial terms, than simply using teachers trained to use metropolitan languages and materials in those languages.

One consequence of these emerging views was that vernaculars were banned in many schools, even in students' leisure time, and cruel and demeaning punishments imposed on those who spoke them. This practice has waned but continues to some extent, along with the belief on which it was founded, in many Pacific Islands.

Independence and Linguistic Revival

Most Pacific Island nations gained independence or some measure of autonomy in the latter half of the twentieth century; others (notably those ruled by France and Chile) struggled for it in vain. In some, there was a reaction against what was perceived as excessive use of the colonial language in education, and moves began, by governments and people, to revive indigenous languages, some of which were in danger of extinction, and increase their use in education. Today, most Pacific Island nations continue to practice transitional bilingual education, constantly looking for the best balance between the indigenous and the colonial language in terms of quality and cost of education and maintenance of culture versus access to the world. At one extreme are countries such as Tonga and Samoa, which have a single well-established standard language, enabling them to use the vernacular widely in education. At the other extreme are those such as Papua New Guinea, the Solomon Islands, and New Caledonia which have no vernacular standard languages and so tend to stick to the colonial language. Yet another extreme is represented by Hawai'i (and New Zealand), and to a certain extent the Northern Marianas, parts of French Polynesia, and Rapanui, which do have indigenous standard languages that have been used in education, but demographic change and other factors have reduced them to the status of minority languages.

Some governments have established official bodies to serve various functions in relation to the vernacular, such as the Académie Tahitienne (*Fare Vana'a*) in Tahiti, Chamorro Language Commission in Guam, etc. While some have done sterling work in publishing language resources, the usefulness of others is mitigated by the fact that they view their mission as not to develop the language but to keep it from changing.

The Pacific Languages Unit

The University of the South Pacific (USP) was founded in 1968 as a regional university for twelve largely anglophone Pacific nations: Solomon Islands, Vanuatu, Fiji, Tonga, Niue, Cook Islands, Samoa, Tokelau, Tuvalu, Kiribati, Marshall Islands, and Nauru. In 1983, USP set up the Pacific Languages Unit at what is now its Emalus Campus in Port Vila, the capital of Vanuatu, to conduct research into Pacific Island languages of the USP region, both indigenous and introduced, to raise the status of Pacific languages, and to offer courses in language planning related topics, such as dictionary compilation and using vernaculars in education, to cater for the anticipated needs of member governments (Crowley 1996, pp. 261–262; Crowley 2006, p. 217). To this end it also convened in 1984 the first conference on language planning in the Pacific (Crowley 1984). Among the resolutions of this conference were that “greater emphasis be given to the use of Pacific vernaculars at all levels of education” (including the Melanesian pidgins) and that “regional tertiary institutions teach Pacific vernaculars for degree credit, and recognize Pacific vernaculars as languages for the presentation of theses.” Although subsequent conferences were planned, they never eventuated, but the PLU did publish a volume on Pacific languages in education (Lynch 1996). In 2006 all of the courses in language planning were scrapped by the management of USP, ostensibly because of low enrolments.

Language Nests and the Polynesian Language Forum

As a result of colonialism, annexation, immigration, and westernization, many Pacific Island languages have been losing ground to world languages such as English, French, and Spanish. This has been particularly the case in the eastern Polynesian island groups of Hawai'i, Aotearoa (New Zealand), French Polynesia, and Rapanui (Easter Island), and it seemed in the late twentieth century that the indigenous languages of these places, particularly Hawaiian and Māori, were doomed to extinction.

Language activists in these two Eastern Polynesian island groups then took the bold step of setting up immersion preschools, where young children would be “immersed” in the indigenous language and thereby learn it close to natively. These were called “language nests” – *kōhanga reo* in Aotearoa and *pūnana leo* in Hawai'i. The first one in Aotearoa was founded in 1982 followed by Hawai'i in 1983. They were so successful that parents wanted their children to continue learning

in the indigenous language, so they developed into schools and eventually tertiary institutions where the indigenous language is the medium of instruction.

As the children of the original language nests grew older, so also grew the need for vocabulary to teach more and more different subjects. Language activists in these two island groups also wanted to take their commitment further, so they endeavored to use the language at home and in the workplace – even though it was a second or third language for the vast majority of them. These two developments presented a similar problem to that experienced by Pacific languages on the introduction of Christianity and western education – the need to decide on the many new words that are needed for a person to function in today’s world. To coordinate this and other language revival efforts, the Polynesian Languages Forum was established in 1991. Since most of these language activists were determined to distance themselves and their language from the colonial languages, they adopted a policy of avoiding loanwords as much as possible and building new vocabulary solely through expansion and compounding (neologisms). Thus, for example, while there are two words for “computer” listed in the standard Hawaiian dictionary, language revivalists prefer to use the compound *lolouila*, literally “electric brain,” rather than the borrowing *kamepiula*. There has been much discussion among linguists and language planners as to whether this “purist” policy is a good one, since borrowing is, to linguists, a natural linguistic process. For more details on Hawaiian, see Schütz (1994, pp. 361–377), and for Aotearoa, see Holmes (2001, pp. 111–113) and Harlow (2004).

The University of Hawai‘i and Micronesian Bilingual Education

Since most of the political entities of Micronesia are in the US sphere of influence (the exceptions being Nauru and Kiribati), the Pacific and Asian Linguistics Institute of the University of Hawai‘i undertook, from 1970 to 1983, a suite of programs, costing millions of dollars, to (1) document professionally the major languages of Micronesia, (2) train Micronesian educators in linguistics, and (3) promote vernacular language literacy by producing vernacular materials in all required subjects for at least the first 8 years of education and training teachers to teach competently in the vernacular (Spencer 1996, pp. 21–24; Rehg 2004, pp. 498–500).

While the first two aims appear to have been satisfactorily achieved, the realization of the third, the promotion of vernacular literacy, has been “modest at best” everywhere except in Palau (Rehg 2004, p. 500), and many of the vernacular materials developed have fallen into disuse and few further materials produced (Spencer 1996, p. 24). Part of the problem – one not found to the same extent in other Pacific languages – has been that linguists found that many of the existing orthographies devised by missionaries were phonemically inadequate, so modified them, in some cases radically, to be phonemic, with one symbol for each phoneme, using diacritics; but the new orthographies were largely shunned by the speakers themselves. Rehg (2004, p. 510) concludes that “bad orthographies are therefore worse than worthless, because they may come to stand as obstacles to literacy.”

He also argues (2004, p. 514) that “the types of transitional bilingual education programs that are currently widespread throughout Micronesia are, in the long run, more likely to be accelerators . . . of language loss.” He therefore recommends (2004, pp. 511–514) that (1) standardization not be rigorously enforced such as to stifle creativity, (2) dictionaries suitable for schoolchildren be published, and (3) training of vernacular-speaking educators be resumed, for it is they, not foreign linguists, who will determine the success or otherwise of a vernacular education program.

Country Summaries

Melanesia

For an account of the use of Melanesian languages in education in the 1980s, see Crowley and Lynch 1986.³

Papua New Guinea

Population 6,300,000. Over 800 languages, mostly Papuan (largest Enga 200,000), with Austronesian languages (largest Tolai 80,000) on some coasts and islands. Three Polynesian outlier languages.

Missionization: 1871 LMS in Papua. 1885 MSC. 1890 agreement to partition Papua among LMS, Methodists and Anglicans. 1875 Methodists, mostly Fijians, in New Britain and New Ireland. The highlands were not missionized until after World War II.

Church languages: 1874 Motu chosen as LMS church language in Papua. Dobu used by the Methodists in the Papua islands, Yabem by Lutherans in 1890 in Morobe province, Tolai (Kuanua) by the United Church in New Britain and New Ireland. All have declined in use since around 1950. Tokpisin used in some church schools in the mid-twentieth century but banned by the government (Australian administration) in 1962 (Siegel 1996, p. 156).

Pidgins: Hiri Motu (120,000 L2 users), a pidgin based on Motu, used to be widespread in Papua but is being replaced by Tokpisin (120,000 speakers).

Annexation: 1884 British protectorate in Papua, German protectorate in New Guinea. 1905 Papua Australian territory. 1914 all annexed by Australia, 1921 Australian League of Nations mandate. 1975 independent.

Independence: Tokpisin much used in nonformal education. Some provincial governments have moved towards vernacular education, as far as their powers extend, but there was until recently no national language policy. In North Solomons

³Information on missionization is mostly from Garrett (1982), population and political status from Crocombe (2008), and statistics on languages and speakers are based on Lewis et al. (2014). Note the following abbreviations: LMS London Missionary Society, founded in 1795 by various Calvinist churches (Garrett 1982, p. 9); MSC - French Missionaries of the Sacred Heart; Picpus - French Congregation of the Sacred Hearts of Jesus and Mary; Marists - priests (and brothers) of the France-based Society of Mary.

Province (Bougainville), money from mining allowed investment in vernacular preschools – Village Tok-Ples Schools Project began in the 1980s, now expanding but still insufficient for the 21 major languages. 1989 government policy to encourage vernacular and Tokpisin in schools (Abare and Manukayasi 1996), but in 2012 government announced plans to switch to using only English (Rheoney 2012).

Solomon Islands

Population 539,000. Nearly 70 distinct languages, including six Papuan and seven Polynesian outliers.

Missionization: 1844–1847 Marists, aborted; returned 1898. Anglicans spread from Vanuatu to eastern Solomons, Methodists from Fiji to western Solomons, South Seas Evangelical Mission began among Solomonese laborers in Queensland, then to Malaita in 1904, becoming the South Seas Evangelical Church in 1964.

Church languages: Anglicans used Mota (see s.v. Vanuatu). Methodists selected Roviana, which then spread to Bougainville in Papua New Guinea. South Seas Evangelical Church uses vernacular, Pijin and English. Mota and Roviana have declined in importance since WWII.

Annexation: 1893 British protectorate (to control labor trade). 1942–1943 invaded by Japan. 1978 independent.

Independence: Officially only English in education, with little development of vernacular literacy, though Pijin is widely spoken and used by NGOs and vernaculars often used unofficially in primary schools (Lee 1996).

Vanuatu (“New Hebrides” Until 1980)

Population 230,000. The most linguistically diverse nation in the world, with over 100 languages, including three Polynesian outliers. No vernacular has more than 10,000 speakers (Lynch 1996, p. 245).

Missionization: By late nineteenth century, territorial division with English-speaking Anglicans in north Vanuatu and Presbyterians in south Vanuatu, French-speaking Catholics in the northwest and scattered throughout.

Church languages: 1866 Mota selected by Anglican church in Melanesia. For other religious lingua francas, see Crowley (2006, pp. 168–169).

Annexation: 1906 joint British and French rule. Until the 1950s mostly vernacular as medium (Crowley 2006, pp. 180–181). Bislama (Vanuatu Melanesian pidgin) became the lingua franca but not used in education. Missions still ran education, using vernaculars to some extent, but 1960s saw rapid change to English and French in government schools (Crowley 2006, pp. 181–182). 1980 independent.

Independence: Constitution states that English, French, and Bislama are official languages, and Bislama the national language, but no use of Bislama or vernaculars in education, though NGOs commonly use Bislama. 1995 official warning that use of languages other than English and French would be treated as professional misconduct (Lynch 1996, p. 248). “Vanuatu is thus probably the only country in the world in which the constitutionally recognized national language is neither an official medium of instruction nor a subject in the primary or high school systems” (Lynch 1996, p. 248). Popular belief is that Bislama interferes with acquisition of

English (Siegel 1996, pp. 166–173), is not a real language, and is unsuitable for education (Lynch 1996, pp. 250–255). Some schools still punish students for using vernacular or Bislama (Crowley 2006, p. 192). The 2010 new policy proposes vernacular up to year 2, French and/or English gradually introduced from year 3, and main medium of instruction from year 4 [John Mccaffery p.c.].

New Caledonia (“Kanak” Preferred by Proponents of Independence)

Population 245,000. 40 languages, including one Polynesian outlier and immigrant languages such as French (70,000), Wallisian (18,000), Futunan (3,000), and Javanese (4,000).

Missionization: 1840–1845 Samoan and Cook Islander LMS missionaries in Loyalties and Isle of Pines aborted. Marists on mainland (Balade) 1843, also aborted, though both continued on Loyalty Islands. LMS handed over to French Protestants around the beginning of the twentieth century.

Annexation: 1853 annexed by France, 1863 vernaculars banned in schools, 1864 LMS schools closed, reopened after a year. 1878 and 1917 rebellions suppressed. 1945–present various measures towards independence, but still overseas territory of France. 1975 first law encouraging vernacular language teaching. 1984 repeal of law banning teaching vernaculars in schools, but little vernacular literacy, all instruction in French. 1979–1987 Office of Vernacular Languages produced first vernacular publications. 1990s four vernacular languages taught in upper secondary and examinable for baccalaureat, primary vernacular lessons in Loyalties and North, none in South. Still no use of vernaculars or relevant teacher training (Léonard 1996, 1998).

Fiji

Population (including Rotuma) 882,000.

Rotuma has one language with little internal variation, closely related to Fijian and Polynesian languages.

Missionization: 1839 LMS, 1841 Methodists, 1847 Marists. Fierce rivalry and war between Catholics and Methodists in the 1870s, separate spelling systems.

Annexation: Ceded to Britain by the chiefs in 1881, becoming part of the colony of Fiji, to which it has since remained politically attached. Independent with Fiji in 1970.

Fiji has approximately 300 communalects in two major subgroups. Currently spoken by over 440,000. Main immigrant language is Fiji Hindi (400,000). No other language has more than 10,000 speakers.

Missionization: 1835 Methodists founded literacy and education in Fijian. 1844 Marists, then Anglicans and Seventh Day Adventists.

Church language: Methodists selected what they called “Bauan” Fijian as standard, and all religions followed suit.

Annexation: 1874 became British colony, followed by introduction of laborers from India, resulting in Fiji Hindi, a koine of a number of north Indian languages, including Awadhi and Bhojpuri, with loans from English and Fijian. By 1984 it was spoken by half the population. Catholic schools began using some English in the

1880s, and this increased for all schools throughout the twentieth century (Mangubhai and Mugler 2006, p. 78–82).

Independence: 1970 independent within the British Commonwealth. Military coups since 1987 have led to political instability but had little effect on bilingual education. General policy has been vernacular (Fijian or Hindi) as medium of instruction in classes 1–3 followed by transition to English (Mangubhai and Mugler 2006, pp. 50–55) but little support for vernacular education in terms of materials or training.

The Fijian Dictionary Project, founded in 1972 to compile a monolingual dictionary, became the Institute of Fijian Language and Culture (Geraghty 2007). Its decisions on language planning issues (spelling, word division, neologisms) were sometimes controversial (Mangubhai and Mugler 2006, p. 84) but have now been largely accepted, even in educational materials.

Micronesia

Palau

Population 22,000. The main indigenous language, Palauan, is Western Austronesian. Small numbers (400) of speakers of Nuclear Micronesian languages of outer islands of Tobi and Sonsorol threatened by Palauan.

Missionization: 1886 Spanish Catholic missionaries of the Capuchin order. Some Spanish loanwords in Palauan, mostly related to Catholicism.

Annexation: Mid-sixteenth century to 1898 nominally ruled by Spain, but little presence. 1899–1918 ruled by Germany. 1918–1945 administered by Japan, hence many Japanese loanwords. 1945–1979 under USA as part of the Trust Territory of the Pacific Islands.

Independent in 1979, 1994 Compact of Free Association with the United States. 1995 US bilingual program (Spencer 1996). Palauan is part of the curriculum up to Grade 12 and more vernacular language materials are used than anywhere else in Micronesia (Rehg 2004, p. 501).

Guam

Population 175,000. Indigenous language, Chamorro (63,000 speakers), is Western Austronesian, closely related to Philippine languages. Immigrant languages include Tagalog (24,000) and English (US military and dependents) (60,000).

Declared a Spanish colony in 1565, and under Spanish control from 1668, witness many Spanish loanwords. 1669 first school in the Pacific Islands founded by Jesuits (Hezel 1989, p. 24), by 1899 every village had a school (Spencer 1996, p. 16). 1899 annexed by USA, 1941–1945 occupied by Japan. 1950–present unincorporated territory of USA.

1970 law changed to allow bilingual education, first bilingual program (Underwood 1989, p. 37, Spencer 1996, p. 22). Chamorro instruction mandated in schools since 1977, implemented since 1980, but threatened by English (Rehg 2004, p. 513). 1989 Micronesian Language Institute. 1990s increasing use of English.

Commonwealth of the Northern Mariana Islands

Population 55,000. Main indigenous language Chamorro (12,000) (as in Guam), Carolinian (“Refaluwasch” to its speakers) (2,500), introduced early 1800s from the Caroline Islands. Approximately 40,000 speak immigrant languages, mostly Tagalog (15,000), English (7,000), and Chinese (6,000).

Annexation: 1565 annexed by Spain, all inhabitants moved to Guam. 1668 Spanish settlement established, ruled from Manila. 1898 German. 1914 annexed by Japan. 1921 Japanese League of Nations mandate. 1944 USA, 1947 Trust Territory of the Pacific Islands, USA administered. 1975 voted to become commonwealth of USA, 1978 government installed.

Linguistic revival: Since 1970s there has been a bilingual education policy intended to ensure the survival of Chamorro and Carolinian, but these are minority languages, most of the population being immigrant. English is the dominant medium of instruction. New orthography for Saipan Carolinian generally accepted (Rehg 2004, p. 502). No constant support for bilingual materials and teacher training but some Congressional funding in 2012 (Sablan 2012).

Federated States of Micronesia

Population 115,000. Main languages Yapese (7,000), Chuukese (Trukese) (45,000); two dialects of Pohnpeian (30,000), Mwoakiloa (Mokilese) (1,000), Pingelapese (2,500), Kosrae (8,000); and two Polynesian outlier languages, Kapingamarangi (3,000) and Nukuoro (1,000). Many other languages with relatively few speakers on atolls (Mortlockese, Puluwatese, Satawalese, Ulithian, etc.).

Missionization: 1852 American Protestants from Hawai‘i, school medium mostly English. Catholics during Spanish rule.

Annexation: 1885–1899 colony of Spain, medium of education Spanish. 1899–1914 colony of Germany, little effect on education. 1914–1921 annexed by Japan, mission schools closed. 1921–1945 Japanese League of Nations mandate. Japanese dominated in schools, only informal use of Micronesian languages by teachers. 1945 annexed by USA. 1947–1986 under trusteeship of USA under United Nations mandate. 1986–present independent republic in association with USA. Vernacular first 3 years, then bilingual 3 years, secondary English but vernacular much used informally. Disagreements over standardization and spelling, except Pohnpeian (Spencer 1996; Rehg 2004, pp. 502, 509).

Nauru

Population 10,000. Nauruan spoken by almost all, but not used in education. Most also speak Chinese Pidgin English.

Missionization: 1888 American Protestants from Kiribati. 1902 MSC.

Annexation: 1888 annexed by Germany (with Marshall Islands). 1914 annexed by Australia. 1919 Australian, British, and New Zealand League of Nations mandate, administered by Australia. 1942 invaded by Japan. 1945 annexed by Australia. 1946 Australian, British, and New Zealand United Nations trusteeship,

administered by Australia. 1968 independent republic, but no moves to introduce Nauruan in education. Two different orthographies, one Catholic and the other Protestant.

Marshall Islands

Population 56,000. Two closely related dialects of Marshallese.

Missionization: 1860 American Protestants from Hawai'i.

Annexation: 1886 German protectorate. 1914 annexed by Japan. 1921 Japanese League of Nations mandate. 1945 annexed by USA. 1947 US United Nations trusteeship. 1986 independent, Compact of Free Association with USA. Education only English till 1950s, then Marshallese in primary. English in secondary, but much informal use of Marshallese. Marshall Islands Language Commission reluctant to accept new orthography (Spencer 1996; Rehg 2004, p. 502).

Kiribati

Population 94,000. One language with slight dialectal variation.

Missionization: 1857 American Protestants from Hawai'i, taken over by LMS in 1917. 1888 MSC in central Kiribati.

Annexation: 1892 British protectorate. 1915 British colony combined with Tuvalu (q.v.), Line and Phoenix Islands and Tokelau (q.v.) as the "Gilbert and Ellis islands." 1979 independent republic.

1983 Kiribati Language Board under Ministry of Education, to maintain and develop Kiribati. No accepted spelling system. Board is trying to develop Kiribati primary curriculum. As with Papua New Guinea, Kiribati has recently announced (2013) that it will switch to English as sole medium of instruction [John Mccaffery p.c.].

Polynesia

Tonga

Population 100,000.

Missionization: 1797 LMS aborted. 1826 Methodist, 1830 king converted. 1845 kingdom established with support of missionaries. 1842 Marist, 1902 Anglican.

Annexation: Tonga was never annexed and has remained a monarchy, but enjoyed a special relationship ("Treaty of Friendship") with Britain from 1900 to 1970. It uses its vernacular in education probably more than any other Pacific nation (Samoa being a possible exception). Recently popular pressure to introduce English earlier, despite educationalists saying it is better to introduce English in class 4. 1990s though official policy is English in secondary, Tongan used extensively by teachers improves learning but affects quality of English essays required in external exams (Thaman 1996). 2014 Tongan is compulsory for all students up to Form 7, English not taught until Class 3 and only orally, over 100 Tongan readers published and more in preparation (Taufe'ulungaki 2014, p. 14).

Niue

Population 1,000. Most speak Niuean, closely related to Tongan, but strong pressure from New Zealand English because of political association and migration.

Missionization: 1846 LMS, 1868 printing press. 1876 kingdom with mission support.

Annexation: 1900 British protectorate. 1901 annexed by New Zealand as part of Cook Islands. 1904 separate from Cook Islands. 1909 one New Zealand government school, Niuean main medium. 1950s LMS schools closed, replaced by English-medium government schools, children punished for speaking Niuean past classes 1–3.

Independence: 1974 independent in free association with New Zealand. 1980s one prestigious English-medium school, Niuean still used extensively in village schools, officially classes 1–3 Niuean, 4–8 both (Lui 1996). Niue Language Commission has produced first monolingual dictionary in Polynesia and first thesaurus in the Pacific (in 2014).

Wallis (“Uvea”) and Futuna

Population 15,000. Uvean and Futunan are fairly similar Nuclear Polynesian languages.

Missionization: 1837 Marists introduced education in the vernacular and Latin.

Annexation: 1842 French protectorate sought, formalized in 1887. 1961 chose to become overseas territory of France, vernaculars largely replaced by French except in preschool (Pechberty 1998).

Samoa (“Western Samoa” Until 1997)

Population 180,000. Vast majority speak Samoan, little dialect variation.

Missionization: LMS 1830. By 1841 a school in every village. Malua training institution sent many islander missionaries to other Pacific Islands. 1845 Marists.

Annexation: 1899 annexed by Germany. 1914 invaded by New Zealand. 1921–1946 New Zealand League of Nations mandate. 1947–1962 New Zealand United Nations trusteeship. 1962 independent.

Independence: All primary education in Samoan, secondary in English. Some Samoan used also in National University of Samoa.

American Samoa

Population 67,000, almost all speak Samoan.

Missionization: as for Samoa.

Annexation: 1900–present unincorporated territory of USA, administered by the US Navy until 1951.

All primary education in Samoan, but lack of materials and teacher training. Secondary English (USA).

Tokelau

Population 600. Three small atolls. Language similar to Tuvaluan.

Missionization: Samoan LMS, Marists.

Annexation: 1889 British protectorate. 1916 included in Gilbert and Ellice islands (see Kiribati). 1925 transferred to New Zealand. 1948 incorporated into New Zealand.

1980s no text books in Tokelauan, not used in schools.

Tuvalu (“Ellice Islands” Until 1978)

Population 9,800. Single language with some dialect variation. Kiribati spoken on Nui.

Missionization: 1861 LMS from Samoa, Samoan language of literacy and education. 1969 church autonomous, gradual switch from Samoan to Tuvaluan as church language.

Annexation: 1892 incorporated with Kiribati (then ‘Gilbert Islands’) as British protectorate.

Independence: 1978 independent. 1980s government policy for bilingualism in Tuvalu and English. Class 1–3 Tuvaluan officially medium of instruction, then English, but in fact Tuvalu to class 8. Even in secondary where English is official, teachers often use Tuvaluan. 1996 Tuvalu text books awaiting Language Board approval. No teacher training in use of Tuvaluan. Vaitupu generally taken as standard but other dialects are used (Ielemia 1996).

Hawai’i (Formerly “Sandwich Islands”)

Population 1,300,000, mostly descendants of nineteenth-century migrants from mainland USA, Japan, Korea, China, Philippines, etc.

Missionization: 1820 American Protestants. 1823 first school at Lahaina, half the population literate by 1830. 1831 first high school. 1827 Picpus missionaries, 1831 deported. 1836 returned, persecuted, but saved by intervention in 1839 of French ship. Late nineteenth-century Hawaiians the most literate people in the world.

Annexation: 1810–1893 Hawaiian monarchy with support from missions. 1893 monarchy overthrown by US businessmen, 1900 annexed by USA, 1959 US state.

1893 Hawaiian banned in schools. 1980s only 1 % speak Hawaiian. Cultural resurgence perhaps too late – but Punana Leo (language nests) successful and popular.

French Polynesia

Population 270,000. A number of related cultures, each with its own East Polynesian language or dialects: Marquesas (8,000), Gambier Group (Mangareva) (600), Tuamotus (16,000), Society Islands (Tahiti and the Leeward Islands) (65,000, many more on other islands) and the Austral Islands and Rapa (3,300). Immigrant language French (35,000 monolinguals, many more L2).

Missionization: 1797 LMS aborted. 1801 LMS. 1817 printing press. 1825 LMS in Marquesas. 1832 Marquesas divided, LMS north, American Protestants south. 1834–1839 Picpus. After French annexation LMS voluntarily withdrew, replaced by French Protestants.

Annexation: 1843 France proclaimed a protectorate over the realm of Pomare. 1880 annexed and expanded to include neighboring archipelagoes. 1957–present overseas territory of France.

All churches used Tahitian in schools originally, but 1900–1960 Tahitian forbidden in many schools. 1972 Académie Tahitienne (Fare Vana'a) to standardize and promote teaching in Tahitian. 1976 Tahitian medium in some schools, successful and popular. 1980s–1990s vernacular medium in early primary, but no relevant materials or teacher training; thereafter French, but Tahitian compulsory as subject (Pukoki 1996).

Pitcairn

Population 50. Settled by Polynesians, but abandoned. Resettled by mutineers from the Bounty and their families. Speak Pitcairnese, a variety of English strongly influenced by Tahitian.

Missionization: Already Christian and literate. Served by LMS.

Annexation: 1898–present British colony.

Education in English by Seventh Day Adventist church until 1948, when New Zealand agreed to provide a teacher and New Zealand curriculum followed (Pérez 1998, pp. 256–259).

Rapanui (Easter Island)

Population 3,800. Indigenous now less than 50 %.

Annexation: 1888–1966 colony of Chile. 1966–1979 department of Valparaiso. 1979–present province of Chile.

Medium of education Spanish.

Cook Islands

Population 16,500. Mostly closely related East Polynesian languages, though Pukapuka is West Polynesian, on Palmerston a variety of English is spoken, and especially in Rarotonga, the main island, there is a shift to New Zealand English.

Missionization: LMS 1821. Takamoa training institution sent many local missionaries to other Pacific Islands. 1895 Catholic sisters found schools.

Annexation: 1888 British protectorate, 1901 annexed by New Zealand, 1965 independent in association with New Zealand.

Cook Islands Maori officially medium of instruction classes 1–3, but little used in Rarotonga. Up to class 6 for Maori and Health Science, difficult for northern Cooks, especially Pukapuka where the language is very different. No texts on Cook Islands Maori or teacher training (Balawa 1996).

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Part V

**Bilingual and Multilingual Education in the
Americas**

Indigenous Bilingual Education in Latin America

Luis Enrique López and Inge Sichra

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Abstract

Indigenous bilingual education in Latin America dates back to at least the beginning of the twentieth century. Since then the field has evolved significantly, concurrently with the political advancement of Indigenous social movements. The history and contributions of bilingual education are briefly analyzed here, paying particular attention to the challenges, tensions, and paradoxes that arise due to the direct involvement of a growing Indigenous intelligentsia and the adoption by governments of new educational policies regarding Indigenous peoples.

Keywords

Decolonization • Democracy • Equality with dignity • Indigenous • Intercultural bilingual education • Interculturalism

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Introduction

Since the 1970s Latin America has experienced processes of Indigenous resurgence (Meyer and Maldonado 2004). Hence, most countries have undergone constitutional reforms acknowledging multiethnicity, multiculturalism, and multilingualism as well as the right of Indigenous peoples to education in their languages and in certain situations also under community management and control, as is the case in Colombia (CRIC 2004).

Indigenous peoples' movements are highly political and one cannot separate education from their struggles for self-determination. It was mainly the political mobilization of Indigenous organizations themselves that succeeded in leading to educational reforms and intercultural bilingual approaches (e.g., Bolivia and Ecuador). Bilingual education also contributed to generate critical awareness and organization among Indigenous peoples.

Through interculturalism Indigenous organizations, leaders, and committed academics have questioned the structure and functioning of the nation-state that has historically adhered to uniformity and homogeneity. Applied to education this notion challenges the coloniality of power and knowledge, thus moving toward the positive acceptance of Indigenous worldviews and funds of knowledge.

Turning into the twenty-first century, the relationship between Indigenous peoples and nation-states has become even more complex. On the one hand, countries like Bolivia and Ecuador that constitutionally adopted policies of plurinationalism (to radicalize their position before the homogenous nation-state and further challenge the inequitable distribution of power in multination societies), intraculturalism (as complementary to interculturalism), and decolonization now stress Indigenous knowledge, ethics, and values to the detriment of Indigenous languages. Simultaneously, entrepreneurship education in order to prepare youngsters for a market economy and capitalism is also stressed. This is precisely one of the contradictions that illustrates the increasing gap between rhetoric and practice in the fields of interculturalism and bilingual education (López 2009). On the other hand, in countries like Colombia and Peru that are not yet ascribed to plurinationalism, one can now witness the reinforcement of decentralized policies and practices in intercultural bilingual education that grant local authorities certain degrees of autonomy.

Across Latin America the terms intercultural bilingual education, bilingual intercultural education, and ethno-education are used interchangeably, depending on the specific history of each country.

Early Developments

Contemporary Latin America Indigenous bilingual education (IBE) has a long history dating back to the early twentieth century with experiments by teachers working in Indigenous communities in Mexico, Peru, and Ecuador (López 2009).

Starting in the late 1930s in Mexico, the United States-based Summer Institute of Linguistics (SIL) became a privileged actor, when various governments signed contracts with this institution whose main mission is the translation of the Bible. Additionally, in the Amazonian basin, SIL incorporated Indigenous communities that were then either isolated or had limited contact with the mainstream. For over 50 years, SIL emphasized language development and evangelization, from a perspective of planned cultural change (Larson et al. 1979), which has drawn severe criticism (Hvalkov and Abby 1981). But it must also be acknowledged that the importance given to the development of literacy in Indigenous languages contributed to the speakers' self-esteem (Landaburu 1998).

Initially IBE was conceived as an instrument of assimilation; hence most governments implemented early exit transition strategies. Nonetheless, large-scale projects carried out in the countries with the highest Indigenous presence had an impact on Indigenous communities and schools. Mexico and Peru produced classical publications on IBE (Aguirre-Beltrán 1973; Arguedas 1966; Escobar et al. 1975). The prominence of IBE in these two countries is closely linked to the national policies of State *indigenism*. This period witnessed a major impact of linguistics in IBE, both descriptive and applied.

As Indigenous movements grew stronger in the 1970s and 1980s, a discursive shift took place in most countries away from transitionally oriented programs to adopting maintenance and development schemes (López 2009). A factor influencing this move was the move to critical *indigenism* and to a more grassroots and critical approach.

From its beginnings, IBE drew attention from academic circles. Between 1963 and 1992, 380 books and articles on various aspects of IBE were published in 13 different Latin American countries (Amadío and López 1993). A review article on the state of the art of interculturalism and education, with a heavier emphasis on Mexico, includes 415 publications in the decade 1990–2000 (Bertely and Gonzáles 2004).

IBE has been analyzed from different and complementary perspectives, as a privileged domain of language policy and planning (Brice-Heath 1972; Escobar et al. 1975), the setting in which the predominantly oral Indigenous societies gradually become literate (King 2001; Sichra 2006), a vehicle for combating the long-standing history of discrimination and racism, and a means to introduce interculturalism in multiethnic societies (López 2009). Others have examined IBE within the framework of Indigenous peoples' rights (Bertely 2009), and the 2007 United Nations Declaration of the Rights of Indigenous Peoples dedicates a chapter to analyze education as an individual and a collective right.

Publications also depict different implementation aspects: curriculum design (Dietschy-Scheiterle 1987), material preparation (Chatry-Komarek 1987), language use and alternation in class (Hornberger 1988), and teacher training (Cuenca et al. 2007). Two additional areas prioritized are L2 learning and teaching and the development of a unified writing system in the Indigenous languages, an issue particularly influential in South America.

Indigenous organizations regard IBE as counter-hegemonic, challenging the predominant homogenous goals of education, even when a government agency implements it.

IBE has permanently been under scrutiny. One of the earliest research projects took place in Chiapas, where Indigenous children obtained better scores in Spanish than their peers (Modiano 1974). Comparable results were attained in Puno, Peru, and also in other countries. In rural Mexico, Francis and Hamel (1992) determined that the competencies of bilingual children developed in their L1 transferred to Spanish, facilitating reading, comprehension, and writing skills in their L2. Similarly, in Peru, López and Jung (2003) found that Aymara-speaking children in IBE produced written texts in Spanish – their L2 – of higher grammatical and rhetorical complexity than those they could produce orally in this same language.

Since the 1990s the geography of IBE has grown significantly since most educational reforms included it as the approach to respond to the expectations of Indigenous populations. Whereas before the implementation of IBE, projects were generally restricted to the countries with more Indigenous presence, by 2014 these programs were being implemented in almost every country. In some cases, for example, Bolivia, an analysis of the evolution of IBE and its upscaling made specialists conclude that governments had changed their perspective moving from focalized projects to the inscription of IBE in national policies (Albó and Anaya 2003). However, IBE remains generally restricted to the formal primary education of children in rural areas and under a compensatory approach.

Major Contributions

The studies reviewed and our own involvement in research and in the practical implementation of IBE show that the adoption of maintenance and development ideologies coincided with an emerging understanding of the role of culture in education. Confronted with the paradox that Indigenous languages were being used as media of Western knowledge transmission, it was considered that much more than bilingual education was needed. Gradually IBE began paying more attention to Indigenous values, knowledge, and practices. It must also be acknowledged that most of the educational reforms of the 1990s included intercultural education for all, influenced by the demands of education for all, establishing links between education and the strengthening of democracy. This has been one of the most pressing demands from Indigenous leaders who claim that to combat cultural homogeneity society at large should become intercultural.

Most recent Indigenous proposals also point in the direction of a two-way IBE (CNEM 2004; CONAMAQ et al. 2004) now under the spirit of decolonization and plurinationalism. These ideals also challenge universities due to their increasing number of Indigenous students. Additionally, Indigenous leaders and intellectuals established autonomous Indigenous universities in Colombia, Ecuador, and Nicaragua in order to accompany their political projects. The Bolivian, Mexican, and

Peruvian governments founded official intercultural universities in order to include Indigenous students and content.

Another major outcome of IBE is related to the increasing attention paid to Indigenous language development. Their introduction to schools meant their previous written development and even their lexical elaboration, tasks which became even more demanding when IBE moved into the upper levels of primary school. IBE adopted the notion of *normalization* taken from the Catalanian and Basque sociolinguistic tradition, and linguists and teachers became involved in language elaboration processes and in the creation of unified writing systems in line with linguistic standardization. Producing textbooks in otherwise oral languages also implied training teachers and community educators who spoke these languages but had not written them.

In line with the emphasis given to language development, initially the preparation of teachers favored training in some aspects of descriptive linguistics, usually to the detriment of a sound understanding of the roles, culture, and pedagogy play in IBE. This orientation has been revised since attention is now given to a more comprehensive understanding of IBE as alternative to hegemonic education. IBE now experiences a process of radicalization at discursive level resulting from the adoption of decolonizing ideologies which pay heavier emphasis to politics and to culture than to language. This reconceptualization in progress is a by-product of the involvement of Indigenous intellectuals and organizations in the field.

It is now generally accepted that in-service teacher training is insufficient and that greater attention ought to be paid to ongoing teachers' professional development. As of the 1990s, more IBE teacher education programs have been established, gradually resulting in curriculum redefinition with more consideration paid to Indigenous knowledge systems and histories.

The benefits of L1 development referred to above do not seem to be restricted to greater L2 proficiency. Findings from different countries provide evidence related to Indigenous bilingual children's overall academic achievement, active participation in learning, development of a positive self-image, self-esteem and respect, a greater capacity for adaptation, and a more tolerant attitude in cases of frustration. It is promising to discover that bilingual children take advantage of, and apply, the linguistic knowledge and experiences previously acquired, in spite of the short span of time devoted to systematic L1 development (3–4 years). With greater investment put into L1 development, one could expect even better results.

Nonetheless, results such as these are challenged by social and economic processes that break away with the notion that being Indigenous implies being monolingual and rural. Nowadays in most countries, the majority of Indigenous populations live in urban settings. Hence, modern ways of life and the European hegemonic language exert heavier influence than ever in Indigenous rural settings. These transformations challenge the theory and practice of IBE: on the one hand, clear-cut definitions of L1 and L2 become increasingly blurred with the prevalence of simultaneous bilingualism, the hegemonic European language is increasingly becoming the preferred language in Indigenous communication, and hence traditional language teaching approaches and methodologies need to be revised.

Two other findings in favor of the inclusion and use of children's languages in education are increased and better quality participation from parents and communities, as well as significant improvement in terms of internal efficiency indicators such as school attendance, retention, and less grade repetition. It is interesting to note that when the power structures are modified and some Indigenous leaders assume important national roles as in Bolivia, the need for grassroots participation is underestimated and the State takes over the Indigenous representation.

If in the 1980s researchers paid attention solely to the ways languages were taught and used in classrooms, more recently the emphasis has shifted to the ways Indigenous people learn and transmit knowledge in different settings. Indigenous ways of learning pay equal attention to the affective and cognitive domains, since you also seem to "learn with the heart" (Castillo 2005). Attention is also paid to the ways languages mediate the primary socialization process in bilingual communities in Mesoamerica and the Andes (Ramos 2014; García 2005). Thus curriculum design is becoming a place of struggle and negotiation between Indigenous peoples and the State and learning is seen as cultural practice. Additionally, the ethnography of formal schooling demonstrates how teachers' beliefs and practices create spaces for the contestation and innovation of IBE policies toward culture and language revitalization (Valdiviezo 2014). Ethnographies further show that different understandings of interculturalism by teachers, parents, and students influence educational practices and generate innumerable contradictions as to how one learns (Osuna 2012).

Work in Progress

The increasing role Indigenous organizations and intellectuals have assumed has brought about new analysis and research issues. Four of them relate to the recuperation of Indigenous views and voices, to newer and greater demands on teacher education and on the preparation of qualified human resources in general, as well as to the challenges of IBE in urban settings and of extending bilingual education to non-vernacular speakers.

Opposed to traditional mainstream education that denies the existence of another language and culture in the classroom, IBE is now recognized as part of the Indigenous patrimony rescuing their values and relocating their languages and cultures, assigning them – at least – in the school domain the same status the hegemonic languages and cultures enjoy. Thus, IBE is understood from a rights approach, including both the Universal Human Rights of 1948 and the Indigenous Peoples Rights of 2007. This paradigm shift places vast demands on teachers professionally trained under the ideals of monolingualism and monoculturalism. Thus, teacher education is moving beyond the technicalities of teaching, in order to professionally prepare them to assume a personal and collective commitment to struggle against racism and discrimination and to accompany Indigenous peoples' struggles. This new focus is aligned with Indigenous ideals of transforming Latin American countries into multination entities. In Bolivia and Guatemala, bilingual teacher professional development has become an issue of national concern, while in

Argentina and Chile, regional proposals resort to the inclusion of Indigenous community educators in classrooms working in tandem with professional monolingual teachers (Hirsch and Serrudo 2013). In Brazil, the reconstruction of local histories is a medium for renewed Indigenous teacher training (Carvalho et al. 2001), while in Colombia emphasis is given to Indigenous ethnicity in order to guarantee student-teacher alignment with Indigenous pedagogical and political projects (Castillo et al. 2008).

In this context, the work regarding Indigenous views is being undertaken both within academic spheres and by some Indigenous organizations themselves. In at least Colombia, Peru, Guatemala, and Mexico, grassroots organizations are involved in the design and implementation of alternative educational programs in which local knowledge and histories deserve specific attention. In Bolivia and Guatemala, this is an outcome of the concern of Indigenous educational councils (CNEM 2004; CONAMAQ et al. 2004). In Colombia and Chiapas, Mexico, the interest on the development of alternative IBE models is a side effect of a profound change in educational management: in Colombia, as a result of the constitutional reform of 1991, Indigenous peoples have the right to design and implement their own models under central government financing (CRIC 2004), while in Chiapas, a new regime of self-determined-autonomous-local governments motivates communities to organize their own education (Baronnet 2013).

Recuperating Indigenous voices and views receives increasing attention from universities and research centers. Such is the case of PROEIB Andes – the Program of Professional Development in Intercultural Bilingual Education for the Andean countries – through its MA program that receives students from seven different countries, including Mexico. Research contributes to Indigenous curriculum design and implementation attending equally to alternative models of learning and education, broader social dimensions of the Indigenous culture, and the sociolinguistics of Indigenous communities (cf. www.proeibandes.org). Those are the cases of a ceramics and textile project for the Awajun of Peru and the Amuzgo of Mexico (Taish 2001; Santiago 2011), an art project for the Mapuche of Chile (Cartes 2001), primary socialization in families working in potato crops in Bolivia (Zambrana 2008) and in corn plantations in Mexico (Argüelles 2010), or regarding the tensions that arise among the Guambiano of Colombia as a result of the introduction of writing (Almendra 2005), or also in connection to the curriculum incorporation of hunting-related knowledge of the Yuracare of Bolivia (Sánchez 2005).

The Indigenous demand for increased inclusion of their knowledge and values has cast doubt on the ontology of school and academic knowledge in general (Stobart and Howard 2002; Trapnell 2008). Indigenous leaders and organizations are now struggling for exercising control over curriculum design taking advantage of the fissures opened by the ministries of education themselves when they opened up legal provision for curriculum diversification (CNEM 2004; Aikman 2003). Nonetheless, new official curricula leave little room for the inclusion of Indigenous knowledge and practices. Moreover, when regional or local curricula exist, as in Bolivia, Ecuador, and Guatemala, national governments practically ignore them.

Indigenous demands constantly challenge top-down educational policies and push for bottom-up ones. In the context of political decentralization, the classical leadership in IBE that Mexico and Peru once had was displaced in the 1990s into other countries where IBE was the result of popular demand and Indigenous struggle (e.g., Bolivia and Ecuador). However, more recently, and also due to the paradoxes these two countries are experiencing, further displacements have moved leadership in IBE mostly to the local level onto Indigenous organizations, NGOs, and regional governments, as in the cases of Peru (Zavala 2014) and Colombia.

Bottom-up approaches are also implemented in countries and regions where IBE is a new concern. In Argentina provincial governments have taken it upon themselves to implement IBE policies (Hirsch and Serrudo 2013), while in Chile the Mapuches are struggling to have their language recognized and fully included in the educational system (Loncón 2015).

The concern on education for all and the Indigenous demand for two-way bilingual education have brought up IBE initiatives in urban settings, such as those of Cuzco, Peru (www.pukllasunchis.org), where Indigenous and non-Indigenous pupils study together from preschool to high school in a private school. Comparable experiences with Spanish-speaking pupils are being carried out in Guatemala, Mexico, and Quito where at least the teaching of an Indigenous language has been included in the curriculum.

Together with these four new concerns, there is an old issue that still attracts the attention of governments and academia: learning and teaching Spanish as a L2 (Rockwell and Pellicer 2003; Hamel 2004). More work is needed in this area, particularly due to pressure from parents regarding their children's needs to master Spanish in order to have better chances in life. Similarly, the L2 methodological issue acquires greater importance due to the unexpected need to teach Indigenous languages to mainstream students. Nonetheless, as mentioned above, L1 and L2 approaches and methodologies need to be seriously revised in view of the profound sociolinguistic changes the Amerindian world experiences.

Problems and Difficulties

In Latin America research cannot be drastically detached from IBE implementation. Most generally researchers are also IBE activists and hence involved in various stages of implementation. In addition it must also be considered that funds available exclusively for research are practically nonexistent, perhaps with the exception of certain Brazilian and Mexican institutions.

When IBE became the most suitable approach for Indigenous students, monolingualism was relatively high and most of this population inhabited rural areas that were either isolated or difficult to reach. This scenario has dramatically changed: roads, migration, telecommunications, economic globalization, consumerism and capitalism, and political and legal transformations have, on the one hand, modified the historical *invisibility* of Indigenous peoples and the physical and mental distance that separated Indigenous and non-Indigenous settings and people; but, on

the other hand, Indigenous survival has been seriously affected, particularly when mining and other extractive industries are part of national policies. Notwithstanding, IBE remains trapped in a perspective of Indigenous monolingualism.

Linguistic communities that lost active use of the Indigenous language are also demanding attention in the context of ongoing identity politics or ethnogenesis. Hence, it has become common for Indigenous leaders to claim that “The school should return to us the language it deprived us of” (López 2015). These claims do not only challenge present understandings of IBE but also existing institutional and communal capacities since Indigenous communities overemphasize the role the school should play in linguistic revitalization while underestimating intergenerational transmission.

As mentioned, Indigenous resurgence challenges the ontology of school knowledge, and now the field is confronted with increasing demands regarding the sense and meaning of national school curricula, within the wider context of decolonization. Such is the case, for example, of Bolivia (Gustafson 2014) and also Nicaragua (McLean 2008). In other countries concessions have been made so as to incorporate Indigenous values, knowledge, and practices at least within the context of IBE for Indigenous students, but contradictions may well arise in the classroom due to the divergence of the underlying worldviews.

Recently and due to ongoing internal migration, more than often schools and classrooms are becoming multiethnic (Czarny and Martínez 2013), and hence Spanish becomes the preferred language of the classroom, since it is difficult for teachers to accommodate to multilingualism.

Another problem is the insufficiency of adequately trained human resources – bilingual teachers and professionals – for the type of education management required. This need is even greater when IBE is under the responsibility of Indigenous community educators.

For at least a decade, most countries have implemented institutional and pedagogical reforms in teacher training along the lines of IBE. Nonetheless, the results appear to be still minimal: teachers do not show the professional and political strength needed to convince parents and communities of the advantages of IBE. Similarly, they cannot break away from rote learning and blackboard copying and dictation, which are persistent features of pedagogy in many places of Latin America and North America, particularly in connection to Indigenous language teaching (King 2001). This tendency becomes stronger when the Indigenous languages are taught as a L2 (Sichra 2006). The usual adherence to “the norm” and the priority given to the written word make the school language gradually diverge from the language of the home, the elders, and the community. This type of language pedagogy contradicts the liberating spirit inherent in IBE and the need to encourage and listen to the student’s own voice in the Bakhtinian sense.

In turn, decentralized horizontal and participatory educational management of IBE requires from administrators and decision-makers more openness toward the community and to local and regional organizations, structures, and knowledge. Committed human resources are needed at all levels within ministries of education and Indigenous organizations. Since traditionally schools imposed upon Indigenous community their own ways and logics of management, reflecting the perspectives of

the hegemonic society, the active participation of parents and community leaders in decision-making regarding institutional and pedagogical management generates conflicts and feelings of insecurity in both parties. Underlying these problems is the clash between hegemonic and subaltern societal sectors which adhere either to the mainstream culture or to the Indigenous one (Sichra 2002). Whether of Indigenous origin or not teachers, unless politically committed and aligned with the interests of the Indigenous peoples, most generally represent the interests of the hegemonic sectors, since they are in fact public officers and are regarded as such by everybody. In this role, teachers gradually experience a loss of agency and their displacement of their sense of purpose (López 2009). Hence, decolonization encounters here a serious impediment.

Future Directions

Many of these challenges place the discussion regarding the future of IBE in a scenario that is both political and epistemological. Both dimensions seem to intertwine. Indigenous claims are more concerned with the need to achieve equality with dignity and to continue being Indigenous and are no longer preoccupied only with issues of school access and coverage. This occurs within a broader framework of a discursive claim for Life for the Common Good. However, it remains to be seen what place Indigenous languages play in this new setting. Paradoxically, the politics and policies of interculturalism for all seem to be going to the detriment of IBE.

In this context, there is a series of open-ended questions that need further analysis. It is no longer possible to speak of a single model of IBE, as governments have historically done. The social transformations alluded to here force us in the direction of a multifactorial IBE or of diverse EIBs, in order to politically and epistemologically respond to diversity at large, in terms of ethics, knowledge, methodologies, didactics, and practices.

This relocated version of Latin American IBE leads us into the following fields of enquiry:

- (a) The issues of equality with dignity or equality within diversity in the design and implementation of educational models for Indigenous students in rural and urban settings, vis-à-vis the global notion of educational quality and the risks of uniformity and standardization.
- (b) The relationship between Indigenous primary socialization and formal preschool education, since more than often Indigenous children are being institutionalized at a very early age.
- (c) Indigenous primary schooling and the need to envisage diversified curricula depending on the specific urban and rural sociolinguistic settings.
- (d) The implementation of certain IBE strategies in high school, vis-à-vis the need to build bridges between primary schooling, high school, and the tertiary level.
- (e) Indigenous youths and their attention by both formal and nonformal education.
- (f) The issue of Indigenous identities and intercultural citizenship.

It remains to be seen whether the notion of decolonization that in fact was in the original spirit of IBE will contribute to empower the education of Indigenous peoples and also to achieve the ideal of unity within diversity. Nowadays, there seem to be two current contradictory paths: (a) the adherence to decolonization without resorting to a full IBE and stressing only the symbolic function of Indigenous languages and (b) the use of this notion to radicalize diverse IBE strategies and/or Indigenous educations, resorting to concurrent active use of the Indigenous languages in classroom and schools. Within this complexity, the notion of decolonization needs further elaboration and operationalization in order to prepare the adequate human resources needed for IBE implementation.

Language revitalization is an area to be addressed and that needs to be approached as a cooperative effort under increasing community control. IBE is then faced with a threefold challenge: (a) revisiting the historical definitions of L1 and L2; (b) redefining language teaching approaches and methodologies since language teaching follows models proper of languages of international communication and of industrialized societies; and (c) training the professionals needed in contexts of multilingualism, language erosion, and active political Indigenous participation (López 2015).

Similarly, and since in a number of countries, like Bolivia, Colombia, Ecuador, Guatemala, Mexico, Nicaragua, and Peru, language rights have been legally acknowledged, IBE has to look beyond the school. Indigenous homes and communities need to be regarded as key agents of language maintenance and revitalization at a moment of increased awareness regarding language endangerment and dramatic loss of biological diversity.

The recognition of the value of Indigenous cultures and languages reflects the historical acceptance by States and societies of the Indigenous ancestry and patrimony. By regarding Indigenous populations as an integral part of the State and promoting their active social and political participation, advances are being made against sociopolitical exclusion, thereby triggering an ideological relocation of linguistic and cultural diversity that has an impact on every citizen of a multiethnic society. This shift implies a tremendous challenge for the mainstream, particularly for those in decision-making. It becomes mandatory to abandon once and for all the compensatory understanding of IBE, within the context of democratic inclusiveness, and to regard IBE as an approach for better educational quality for all. To achieve these goals, the notion of educational quality and the strategies most generally attached to it – national homogenous curriculum, educational standards, and standardized testing – also need to be situated and thus interculturalized. Indeed, one cannot envisage a pedagogy aligned with diversity with tools conceived of for a homogenous monolingual and monocultural world.

Cross-References

- [Bilingual Education for Indigenous Peoples in Mexico](#)

Related Articles in the Encyclopedia of Language and Education

- Luis Enrique López: [Decolonization and Bilingual/Intercultural Education](#). In Volume: Language Policy and Political Issues in Education
- Marleen Haboud: [Language Policy and Education in the Andes](#). In Volume: Language Policy and Political Issues in Education
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Bilingual Education for Indigenous Peoples in Mexico

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Abstract

This chapter summarizes Mexican indigenous education from the perspective of bilingual education including Spanish and one out of 68 indigenous languages. After a historical overview of its development in colonial times, it will concentrate on the development since the 1970s when indigenous education was formally installed as a special department of the Federal Ministry of Education. From bilingual bicultural to intercultural bilingual education (IBE), different approaches were established to reconcile the integration of indigenous peoples into the nation-state via education with their claim to maintain and develop their ethnic identity and their languages. The chapter focuses on the psycho- and sociolinguistic difficulties as well as the existing political and ideological barriers against the organization and implementation of a curriculum that fosters mother tongue and maintenance education and the incorporation of the indigenous

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knowledge systems into the teaching programs. It explains why in practice and beyond the official IBE curriculum, Hispanicization (*castellanización*) prevails in most indigenous schools, i.e., submersion or fast transitional programs which impose Spanish in a subtractive manner and assign no relevant curricular function to the indigenous languages. Mayor research contributions are revised and future directions and research needs are outlined. Finally a few independent school projects are referred to which attempt to create intercultural and bilingual programs from the bottom up.

Keywords

Diglossic ideologies • Enrichment bilingualism • Mother tongue education

Introduction

In Mexico as in the rest of Latin America, the discussion about indigenous bilingual education centers around two fundamental questions. The first relates to the macro-political, sociolinguistic, and anthropological dimension: Will it be possible to build a plurilingual and pluricultural nation-state able and willing to reconcile the forging of national identity and unity with the preservation of linguistic and cultural diversity? The second, of a rather micro nature in the field of psycholinguistics and pedagogy, refers to the modalities of bilingual education, more precisely to the relation between language use, pedagogy, and academic achievement in education, in the context of an asymmetric relationship between Spanish as the dominant and the indigenous as the subordinate languages (Hamel 2013).

The sociopolitical dimension emerges in the debates about the policies that the dominant mestizo society and the state they control design for the nation's autochthonous peoples: Should their members be assimilated and forced to give up their ethnic identity and languages in order to become accepted citizens of the nation? Conversely, could they integrate and acquire full membership while at the same time preserve and foster their own identity and diversity? Ever since the beginning of colonization through Spain in 1519, and even earlier in the Aztec Empire, the state has assigned a central role to education in this process (Heath 1972). And the policy approach has always been top-down.

The pedagogical and psycholinguistic dimension comes into sight when the question arises of how the global sociopolitical goals could best be accomplished through education. What role should the languages involved play in the learning processes? Are the languages of indigenous peoples considered to be obstacles or fundamental tools to acquire literacy, other second-order discourses, and content matters? Should monolingualism in the state language or enrichment bilingualism in both the state language and the indigenous languages be the envisaged aim of indigenous education? How do the linguistic and cultural ideologies of those in power differ from the orientations of indigenous citizens and their organizations?

Since colonial times, two basic strategies of ethnic and language policies developed in Mexico which gained shape after independence in the early nineteenth

century. The first and generally dominant strategy considered the assimilation (i.e., dissolution) of Indian peoples and the suppression of their languages as a prerequisite for the building of a unified nation-state. A second strategy favored the preservation of Indian languages and cultures in this process. As a result, a fastening process of language loss started in the nineteenth century (Cifuentes 2002) which accelerated even more during the twentieth century as an outcome of the social dynamics following the Mexican Revolution (1910). Out of approximately 130 indigenous languages (henceforth ILs, e.g., Nahuatl, Mayan, or Zapotec) spoken at the time of the conquest in what is today Mexico, some 68 vernaculars have survived. Although the indigenous population is growing in absolute numbers, most indigenous peoples are undergoing a process of assimilation and language loss.

The two strategies mentioned above materialized in education and Spanish teaching through two basic approaches which differed considerably in their cultural and educational philosophy and methods, their views on sociocultural integration, and, above all, in their procedure of using and teaching Spanish as the national language. The first strategy pursued the goal of linguistic and cultural assimilation through direct Hispanicization (*castellanización*), i.e., submersion or fast transitional programs. Education in Spanish should actively contribute to language shift and cultural change. Apart from a few exceptional maintenance efforts, slow transitional bilingual education programs reflected the second strategy that was hardly ever committed to a genuine preservation of the ILs; they applied diverse bilingual methods where the Indian languages played a subordinate, instrumental role as languages of instruction and for initial alphabetization. Given the size of the native population and the significant historical commitment to public services, the Mexican state developed by far the largest public school system for the indigenous population in the Americas.

From colonial times until our days, Mexican governments have always subordinated the questions of pedagogical appropriateness and the quality of learning to the political questions of control and integration of the indigenous population. Today, the two dimensions should converge in favor of the stabilization of indigenous peoples as fundamental components for the construction of a new, pluricultural and plurilingual state; and enrichment bilingual education based on instruction and literacy development through the medium of the mother tongue, although still an exceptional model in practice, has shown its superiority over submersion and transitional syllabuses in terms of quality education and the development of academic proficiency in both languages (Modiano 1972; Hamel 2009; Hamel and Francis 2006).

In this chapter, I will briefly refer to education in colonial times. I will then concentrate on indigenous education, its approaches, problems, and results, since its consolidation as an educational system of its own in the 1970s, and review the main contributions, work in progress and perspectives. The emphasis will be on the role of languages in bilingual education, the curriculum, and the learning processes and on the rare cases where there is real mother tongue education. The macro questions of language policy in Mexico cannot be dealt with here (see Hamel 2013).

Early Developments

Although assimilationist education predominated throughout the colonial regime in Mexico (1519–1810), the sixteenth century witnessed some of the most exciting experiments of indigenous language-based education that have occurred in Latin America until our days. Along with other religious congregations, the Franciscans developed an educational philosophy and practice of their own. According to Aguirre Beltrán (1983) and his sources, Franciscan education was based on empathy with indigenous cultures and worldviews, mother tongue instruction, communication, and, above all, Christianization; the Franciscans were the first to practice syncretism in education; they adapted many of the native instructional practices. Their strategy also implied the use of young Indians as cultural brokers and assistant teachers. In the renowned Colegio Imperial de Santa Cruz de Tlatelolco, founded in 1536, advanced education included the development of literacy in Nahuatl, the study of Latin grammar as a path to theology and philosophy, with the ultimate goal to ordain the graduates as priests (Aguirre Beltrán 1983; Heath 1972). Given that the Nahuas (Aztecs) had their own pictographic and ideographic writing systems and used paper (*amatl*) and ink (*tlilli*), they could quickly adopt the European alphabetic writing system for their own language (Lockhart 1992). Since they had already received formal instruction and acquired second-order discourse competence in their own culture, they obtained alphabetic literacy in their language and were able to transfer their knowledge successfully to the literate culture of Spanish and Latin. In the course of the sixteenth century, the alphabetic writing system rapidly displaced preconquest writing, and the development of native language literacy as a social practice spread swiftly through the Spanish colonies, although always limited to a small elite. In Mexico, this early experience of successful L1 literacy acquisition and social use was never achieved again until our present days.

Only in the 1930s would a new turn toward mother tongue education emerge in Mexico. Under the leadership of the US linguist Maurice Swadesh, the well-known Tarascan Project was born (Aguirre Beltrán 1983; Castillo 1945). In the P'urhepecha (Tarascan) region of Michoacán in Central Mexico, a team of Mexican and US anthropologists and linguists developed an integrated program of bilingual education. They elaborated an appropriate alphabet of P'urhepecha based on linguistic and sociolinguistic studies; they trained indigenous teachers in basic indigenous grammar and the alphabet based on the most advanced literacy approaches of the time. The program offered a more adequate pedagogical model for the acquisition of literacy and at the same time fostered the indigenous languages and their maintenance by moving them into the prestige domain of literacy. The abundant anthropological and linguistic research surrounding the education project as well as the proposal of L1 literacy teaching had a long-lasting effect on the national and international debate on bilingual education. Thus, the Mexican delegation played a significant role at the 1953 UNESCO conference on vernacular languages education in Paris, and a Mexican contribution (Barrera-Vázquez 1953) entered the final publication.

Major Contributions: Indigenous Education Today

In 1978, previous modalities of indigenous education found their definite place as a Department in the Federal Ministry of Education under the name of Dirección General de Educación Indígena (DGEI, General Department of Indigenous Education), a subsystem of elementary education. Since the 1970s, its official program was labeled “bilingual and bicultural.” Today it consists of three preschool years plus six grades, the same as the general primary system in the country. Given persistent centralization and an overreaching ideology of a homogeneous nation-state, public primary education in Mexico is based on a common curriculum and common compulsory primers for all students in the country. Therefore, the indigenous schools are supposed to cover the same curriculum as the general monolingual system. The textbooks are oriented toward monolingual Spanish-speaking children, mainly in urban contexts. Therefore, although they serve as an appropriate tool for Spanish L1 literacy teaching, they are not adequate for bilingual education and the teaching of Spanish as L2.

In 2011 some 55,000 indigenous teachers instructed over 1.25 million preschool and primary school students (50 % of the total), speakers of one of the 68 indigenous languages.

At the beginning of each school year, DGEI distributes over 2.5 million primers written in native languages to the indigenous schools, certainly more than in any other American country. Unfortunately, for reasons outlined below, most of them are rarely used; and most observers would agree that the indigenous school system does not on the whole contribute to maintaining and fostering indigenous languages.

Little detailed research exists about indigenous education under the bilingual and bicultural program. Nancy Modiano’s (1972) study is the first to demonstrate, in the case of the Tzotzil and Tzeltal Indians in Chiapas, that L1 or even bilingual literacy instruction yields better results for Spanish L2 literacy skills than the common Spanish alphabetization practiced at that time. More than in Mexico, her book had a significant impact in the USA as a study of advocacy for mother tongue instruction within the emerging debate on bilingualism and bilingual education for immigrant children.

In an extensive study, Bravo Ahuja (1977) analyzed indigenous education focusing on the castilianization process, i.e., the transitional and subtractive teaching of Spanish as a second language (L2). She developed the first systematic proposal, and her team elaborated an official primer. A new debate arose in view of the overt contradictions between the official program that should foster bilingual and bicultural maintenance education and Castilianization practice (Ros Romero 1981), a conflict that continues until the present time. Scanlon and Lezama Morfin’s (1982) collection of papers discussing these issues becomes a central reference for the 1980s.

Most of the relevant components that relate the general sociolinguistic context to indigenous teachers’ orientations, curriculum design, the functions of the languages involved, and classroom interaction are analyzed in an extensive study of the Hñähñũs (Otomi) in the Mezquital Valley reported in Hamel (1988). In general

terms, sociolinguistic analysis identifies for Mexico, as well as the rest of Latin America, that a diglossic language conflict between Spanish as the dominant language and the ILs as the subordinate ones contributes to generalized language shift and loss, in spite of some language maintenance and revitalization processes.

Problems and Difficulties

The indigenous schools reproduce this general tendency, mainly through the diglossic ideologies of the indigenous school teachers who value Spanish and Spanish literacy as their most precious cultural capital, whereas their own native languages are not considered suitable for academic activities. They share, by and large, the nationalist values of a common nation-state that promises upward mobility through a school system of cultural and linguistic assimilation. Consequently, they attempt to teach literacy in Spanish from first grade onto students who are at best incipient bilinguals, instead of developing cognitively demanding higher-order discourses such as literacy in their mother tongue (Hamel and Francis 2006; Francis 2012). Both languages are used orally for instruction, with frequent repetitions and translations that foster neither literacy nor the acquisition of Spanish as L2. The growth of literacy in the mother tongue is neglected throughout elementary education, since it is neither used as an object of study nor as a systematic language of instruction. Thus, the curriculum and teaching practices do not profit from a central and widely acknowledged feature of any bilingual program: the learners' capacity to transfer cognitively demanding skills from one language to the other, a process which could bring about significant academic growth in and through both languages (Cummins 2000). In sum, the predominant classroom practices exhibit a curriculum with chiefly negative effects on the development of academic language proficiency. And the decision not to develop any academic skills in the L1 impedes the advantage of the cumulative effects of cognitive growth and transfer capacities to Spanish. At the same time, the subordinate role of the mother tongue as a transitional language of instruction reproduces the diglossic conflict between the languages and fosters language loss.

Generally speaking, most publications between 1970 and 2010 arrive at similar conclusions, namely, that the general diglossic orientations shared by the dominant society and most indigenous teachers and parents generate a kind of education that contributes to language shift and does not produce the expected educational skills. Summaries of that period can be found in Hidalgo (1994).

At present, a range of pedagogical practices are in use in the indigenous educational system. The most widespread modality teaches literacy in Spanish, uses the official Spanish primer for elementary education as the basic textbook, and employs the indigenous language as the initial medium of instruction. An increasing number of teaching materials in indigenous languages is being used alongside with Spanish primers. And, since the 1990s, a number of pilot projects within the public system develop literacy skills in L1, either as the point of departure of schooling or as a supplementary activity to L2 literacy teaching. On the whole, given extended

poverty in indigenous regions and poor conditions of education along with transitional and submersion programs, the indigenous educational system exhibits the poorest results in general proficiency among the different subsystems.

Work in Progress

Until the last decade of the twentieth century, the federal government sustained through DGEI a bilingual and bicultural model as the target of indigenous education. School children were expected to develop coordinate bilingualism, i.e., to become fluent in the four basic skills in both languages and to know where and when to use each of them. Similarly, both cultures were to be present through appropriate content matters. During the 1990s, the label “bicultural” was replaced by the new concept of “intercultural bilingual education” on the grounds that the term “bicultural” implied a dichotomous worldview that separated cultures inappropriately. The new intercultural bilingual perspective in turn would propel the recognition, knowledge, and integration of both cultures in a pluralistic enrichment perspective (Muñoz Cruz 2006). Both languages should now be the medium and object of instruction (DGEI 2010).

The federal government created new institutions. CGEIB, the General Coordination of Intercultural Bilingual Education (2001) within the Ministry of Education (SEP), was to provide indigenous education with appropriate materials and strategies, as well as course designs on all levels. The main thrust of CGEIB was to develop strategies for intercultural education for mainstream education which was to be intercultural for the country as a whole, meaning that all students in basic education (K-9) ought to be educated in understanding pluricultural enrichment knowledge, as well as developing tolerance and positive attitudes toward indigenous cultures and languages. This approach has been the official policy since 2003; it materialized in an integrated reform of basic education in 2008, including the production of new official textbooks (SEP 2010).

INALI, the National Institute of Indigenous Languages, was created in 2003 sustained by a General Law of Linguistic Rights for Indigenous Peoples promulgated the same year. Its purpose is to reinforce, revitalize, and promote indigenous languages inside and outside education. During the same period, the federal government founded ten new intercultural universities in indigenous areas to grant access to tertiary education for indigenous students, with new course programs relevant to indigenous communities: sustainable indigenous agriculture, legal anthropology, traditional medicine, and language and culture. All the new policies and institutions were created as top-down initiatives, with hardly any consultation or participation of the targeted indigenous communities.

A new area of study was motivated by the massive migration of indigenous families to the cities and to the USA. Tinajero and Englander (2016) and Rebolledo (2008), among others, studied how indigenous children were faring in urban contexts, as well as in the USA.

The federal government maintained the dogma of a unified curriculum for all school children. This was supported by a neoliberal discourse of educational

modernization, quality, productivity, and competition. As of 2010, the ILs were to be introduced in the curriculum of all indigenous schools as a specific content matter under the label of “curriculum parameters.” But these are kept separate from other subject matter which continues to be taught in Spanish in most schools. Thus, the advantages of a “content and language integrated learning” approach (CLIL), a trademark of many modern bilingual programs, are not mobilized, and the ILs are not propelled as languages of instruction and thus of functional prestige. The ILs are labeled “additional languages,” parallel to the introduction of English under the same name as a new compulsory subject starting in preprimary grade 3 in the general curriculum. Since an IL is to be taught in the indigenous schools, whereas mainstream students receive English as a subject, the perverse effect of such a language policy is that the ILs have to compete with English in the same curriculum slot across systems. Given massive indigenous migration to the USA, it is hard to believe that native communities will accept this policy arrangement which excludes them from learning English. Recently, the conceptualization of the ILs as “additional languages” has been given up. The policy dilemma, however, persists.

Future Directions

Since the turn of the century, discourses of ethnicity, interculturalism, and decolonization in education have moved into the center of academic and educational debate in Latin America (see Bertely Busquets and González Apodaca 2003; López 2009). Interculturalism as a normative principle is understood as the respectful communication and negotiation, including mutual understanding, between different ethno-linguistic groups that coexist in a given society (Schmelkes 2006); it is supposed to counteract existing asymmetries and goes beyond the liberal concept of multiculturalism as the recognition of diversity. Intercultural bilingual education (IBE) should teach and reinforce the indigenous students’ cultures and languages first and gradually introduce components of the national culture and language as a second step (Monsonyi and Rengifo 1983). In its more radical variety, IBE implies the struggle against discrimination and inequality and questions the very nature of the nation-state. Decolonization in turn refers to an increasing questioning of the universal character of the Occidental knowledge system imposed by colonization (Quijano 2007) and to the right of indigenous peoples to (re)construct their own epistemologies, to have them respected, and to use them in education and society. In this process of reconstruction, the core value of ILs, both for identity formation and the development of knowledge systems, should be evident. However, although in its origins languages and cultures in Latin America were considered to be closely linked and dependent on each other, the ideological discourses of interculturalism and later decolonization are driving the debate away from bilingualism and the language question.

This distancing from bilingualism occurs for reasons that need urgent research. So far, two interrelated motives have emerged which represent, at least in part, covert policies. Throughout history, language has constituted the single most important core value of indigenous identity in Mexico, both in its endo- and its exo-adscription,

even more so than in other Latin American countries. Indigenous education was established for the sole reason that most indigenous children did not speak Spanish. And an indigenous people or individuals who lost their language were no longer considered “Indian.” Until 2000, the national census counted as indigenous-only speakers of indigenous languages. In 2010, however, it included, for the first time in history, a new question about self-identification. 6.7 million citizens (6.6 % of the Mexican population) declared themselves to be speakers of an indigenous language, but a much larger total of 15.7 million (14.9 % of the Mexican population) identified themselves as indigenous which created a new majority of nine million Indians who do not speak any native language. This tendency can be observed all over Latin America where a surge in self-identification doubled the number of indigenous citizens from one census to the next in countries like Brazil or Chile where the indigenous population has previously been counted through self-identification.

Sociolinguistics has traditionally identified minority language shift as part and parcel of a reorientation of ethnic identity, away from the ethnic minority and moving toward mainstream society. This relation no longer holds in Mexico in the same way it did before, due to increasing ethnic consciousness and indigenous movements but also to the creation of social, economic, and legal programs that provide advantages for those who are recognized as members of a tribe, as occurs in the USA and Canada. This new and growing community is being constituted and made visible as a collective subject that demands recognition and attention. Intercultural education, putting bilingualism in a second place, appears to be the appropriate offer, which coincides with a new power structure in academia and politics based on the control of the label “intercultural.”

The second reason for the distancing from bilingualism is that the design and implementation of successful bilingual programs turned out to be much more difficult and complex than some optimistic perspectives projected a few decades ago. This, of course, is not only the case in Mexico or in indigenous education but applies to bilingual education globally. In Mexican indigenous education, the challenge to design and put to practice a general model and teaching materials, where Spanish and the ILs function as both languages of study and of instruction, with flexible applications according to a variety of sociolinguistic contexts, has not yet been met appropriately. To achieve the benefits of bilingual education would require a level of teacher training, teaching quality, and commitment which the Mexican educational system is far from being able to offer. Instead, it seems to be much easier to concentrate on the intercultural component of indigenous education because it does not require such a rigorous design as the bilingual part, and as a matter of fact, any inclusion of content from both cultures involved is labeled today as “intercultural.”

In sum, despite advances in the promulgation of educational and linguistic rights, little significant progress has been achieved until 2016 in terms of the design and implementation of appropriate bilingual education. At the same time, indigenous language loss advances at an accelerated pace via transitional bilingualism, mainly among the new generations (Embriz Osorio and Zamora Alarcón 2012). Whereas some 40 years ago a majority of indigenous children in Mexico entered primary school as IL monolinguals or incipient bilinguals, since the end of the twentieth

century, this relation has been inversed. Thus, the central questions of indigenous education as *bilingual* education remain largely unsolved in Mexico.

Notwithstanding general stalemate or slow advances on the national level, there are an increasing number of initiatives at the local and regional levels to improve indigenous education and forge new relations between academic achievement and bilingual language use (e.g., Meyer and Maldonado 2004; Coronado-Malagón and Mena-Ledesma 2010; Vargas Garduño 2014; see Podestá Siri and Martínez Buenabad 2003 for more summaries). Mostly opposed to mainstream practice, the new experimental projects are based on a pluricultural conception of the state and the full respect for Indian peoples and their ethnic rights. They claim as their target the maintenance or revitalization of Indian cultures and languages. Most of them remain within the public school system and try to render the rigid official curriculum more flexible. A few experiences such as the Unión de Maestros de la Nueva Educación para México (UNEM) in Chiapas operate as independent schools that develop radically different programs (Sartorello 2009) with no official recognition and finance.

There are local initiatives of indigenous teachers to develop mother tongue education. One example is carried out among the P'urhepecha of Michoacán. In 1995 the P'urhepecha teachers of two bilingual elementary schools in the central highlands of Mexico introduced significant changes to the previous transitional curriculum. Since then, they have been teaching all subject matter including literacy and mathematics in P'urhepecha, the children's first language. The most difficult part was to develop their own writing skills and the necessary academic discourse for all subject matters in their language. Classroom observation and test findings have shown very clearly that students who had acquired literacy in their L1 achieved significantly higher scores in both languages than those who were taught reading and writing only in Spanish (see Hamel 2009 for a general description of the school project). Different from most indigenous schools in Mexico, P'urhepecha had become the legitimate, unmarked language of all interaction at school, a sociolinguistic achievement still quite exceptional in indigenous education. In several years of cooperation with a research team, the schools developed their own validated curriculum based on L1 literacy, content teaching of most subject matters in L1, and a specially designed syllabus for Spanish as L2 (Hamel and Francis 2006). This enrichment curriculum serves now as a model for intercultural bilingual education for other communities and schools. The collaborative work demonstrates the validity of the "common underlying proficiency" hypothesis (Cummins 2000), since success in Spanish L2 literacy is best explained through the previous development of core proficiencies and academic discourse abilities in L1, which could then be accessed much more easily in L2.

The recent developments outlined above and in the previous section require urgent checks and underpinnings from solid empirical research. Studies in the field of indigenous education over the past decade have centered on an array of topics that cluster around indigenous education such as teacher training, teachers' attitudes and ideologies (González Apodaca 2009), and discourses about intercultural education (Dietz and Mateos Cortés 2011). There is, however, a critical shortage of data-driven investigation about central topics such as the bilingual classroom and learning processes, and there are virtually no broad research projects that evaluate bilingual

literacy development and its relation to academic achievement in culturally more appropriate ways for indigenous education than traditional testing.

Cross-References

- ▶ [Indigenous Bilingual Education in Latin America](#)
- ▶ [Indigenous Bilingual and Revitalization-Immersion Education in Canada and the USA](#)
- ▶ [Teaching for Transfer in Multilingual School Contexts](#)

Related Articles in the Encyclopedia of Language and Education

- I. Sichra: [Language Diversity and Indigenous Literacy in the Andes](#). In Volume: Literacies and Language Education
- L. de León: [Indigenous Language Policy and Education in Mexico](#). In Volume: Language Policy and Political Issues in Education
- T. Nikula: [CLIL: A European Approach to Bilingual Education](#). In Volume: Second and Foreign Language Education

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Bilingual Education in Dominant Languages in South America

Anne-Marie de Mejía

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Abstract

This discussion of the development of bilingual education in dominant languages in South America focuses on the evolution of studies from relatively early attempts to get to grips with differing types of bilingual provision in international languages for different populations. The main contribution section initially examines aspects of program development and evaluation in two different types of immersion programs in Uruguay. This is followed by considerations on the development of literacy and oracy, both at primary and secondary school level, in Ecuador, Colombia, and Paraguay. The third part in this section talks about the

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sociocultural dimensions of bilingual education programs in dominant languages, particularly in relation to the construction of attitudes and identities. There follows a discussion on work in progress in the areas of links between bilingual education for dominant language speakers and speakers of indigenous languages, as well as considerations on teacher education for bilingual programs in Argentina and in Brazil. Finally, some of the main difficulties are discussed and the chapter finishes with indications of future directions in the area.

Keywords

Dominant languages • Biliteracy • Identities • Teacher education

Introduction

The term “dominant languages,” as used in this chapter, is derived from the work of French sociologist Pierre Bourdieu (1982) and according to Martin-Jones and Heller (1996, p. 5) is associated with

the interests of certain groups that, because of the control they exert over a particular set of highly valued material or symbolic resources, are in a position to assign value to other forms of cultural and linguistic capital and to influence the operation of educational institutions that produce and distribute the most highly valued resources

Thus, certain linguistic varieties which privilege dominant group interests are more highly valued than other indigenous or minority languages. These constitute dominant languages in terms of perceptions of their importance, power, and prestige in global interaction. In other words, they are seen as socioeconomically important languages.

In developing countries, dominant languages are often the former colonial languages, such as English, French, Spanish, or Portuguese which have been legitimized as official languages in many independent nations in Africa, Asia, and South America. The notion of a “majority language” is a related term and according to Skutnabb-Kangas and McCarthy (2008, p. 10) can be defined as the “language of a dominant group, in terms of numbers and/or power.”

This chapter considers the development of bilingual education programs in dominant languages, particularly English, but also there is reference to Portuguese and Spanish. The emphasis is on how different educational aspects, such as the development of social relationships, motivational, and attitudinal aspects, as well as issues of identity construction, combined with a more traditional interest in program outcomes in relation to levels of bilingual and biliterate proficiency, have widened the scope of research into this type of bilingual provision in South America.

Early Developments

In Latin America, there is a well-established tradition of publication and research relating to the increasing importance that Intercultural Bilingual Education has had in the educational provision offered to indigenous communities, for a general

overview see López and Küper (1999). The concept of “Intercultural Bilingual Education,” as opposed to “Bilingual Education,” has been described by López and Küper (2002, p. 31) in the following terms:

The intercultural dimension of education . . . refers to the curricular relation that develops between the indigenous society’s knowledge and values . . . and those that are unknown or alien. In this regard, a dialogue is sought, as well as a permanent complementarity between the traditional culture and the western one, with a view to satisfying the needs of the indigenous population and contributing to a better quality of life.

López (2004, p. 1) maintains that this educational modality has succeeded

in moving from a tradition of experimental projects to becoming an integral part of national educational systems, within a framework of programmes of educational reform.¹

In contrast, studies on bilingual education for majority language speakers in this part of the world are a relatively recent development, even though the phenomenon itself dates from the early years of the nineteenth century, in the case of some of the first bilingual programs established in Argentina (Banfi and Day 2005).

Nevertheless, it is important to see what has been referred to by some authors (Paulston 1975; Skutnabb-Kangas 1981) as “prestigious” or “elite” bilingual education in South America as a phenomenon with some shared features, which encompasses a wide range of programs aimed at different populations and distinct linguistic and pedagogical goals (King 2005). For this reason, the present overview of developments should be read in conjunction with two other contributions to this volume, which focus specifically on bilingual education provision for Amerindian communities (see chapters “► Bilingual Education for Indigenous Peoples in Mexico” by Hamel and “► Indigenous Bilingual Education in Latin America” by López and Sichra, this volume).

This article focuses on developments in the field of bilingual education in dominant languages in seven South American nations where most published work has been carried out: two Andean countries (Colombia and Ecuador), Brazil, and four “Southern Cone” nations (Argentina, Chile, Paraguay, and Uruguay). Most of the studies referenced date from the past 10 years.

Some of the relatively early contributions to this field are descriptive studies aimed at categorizing bilingual models and programs in particular countries. In this section, I will refer to two such studies carried out in Argentina and Colombia. These surveys constitute important milestones in the process of charting the development of bilingual education programs in each of the countries concerned.

Cristina Banfi and Raymond Day (2005) have tried to come to terms with the diverse nature of what have been termed *colegios bilingües* (bilingual schools) in

¹Author’s translation of this and subsequent quotations in Spanish in the original.

Argentina. After examining more than 150 such schools in the private sector that match the criteria proposed by Johnson and Swain (1997) to distinguish immersion programs, the authors concluded that while most broadly adhere to a model of enrichment, there is a great deal of heterogeneity evident, which derives in part from the particular circumstances of their foundation and their attempts to preserve a competitive edge.

The authors trace the development of some of the most prestigious bilingual schools in Buenos Aires from their origins as “Heritage” or Community Schools catering for the needs of the immigrant communities to a present stage in which the majority of the students are native Spanish speakers, learning English, French, or Italian as foreign languages at school. Initially, students had to cope with separate “parallel curricula,” which gradually became more integrated and more “Argentine” over the years. The authors see the most recent development among the English-Spanish bilingual schools as that of “Global Language Schools” reflecting the spread of English as a Global Language and the increasing internationalization of education.

My own analysis of the situation of bilingual education for majority language speakers in Colombia (de Mejía 2005a) shows certain similarities with the above account, although developments are more recent than in Argentina. The longest established institutions were founded in the 1910s and 1920s for the education of sons and daughters of the representatives of multinational companies stationed in Colombia, as well as for children of members of the expatriate communities.

Nowadays, it is possible to divide existing immersion type institutions into two categories: one relating to private schools with a strong connection with a particular foreign country, which often provides financial support or assistance with staff appointments, and the other which covers national institutions founded by Colombian citizens, usually staffed by Colombian teachers. As in Argentina, there is an urgent need for teacher education programs specifically designed for those teaching in bilingual programs, as distinct from Foreign Language teacher training provision.

In another study in Colombia, this time carried out in the area of intercultural relations at primary school level in Cali, Hilda Buitrago (2002) examined how cultural aspects were treated in bilingual (English-Spanish) education programs. She was particularly interested in studying the congruence between school policy and practice in this respect. After analyzing policy documents and carrying out classroom observation and documentation of school celebrations in a private English-Spanish bilingual school, the author noted that the lack of clarity accorded to cultural considerations in the policy documents was reflected in the variety of positions assumed by individual teachers in their classroom practice. There was, furthermore, a generalized belief among teachers in the school that there should be no reference to North American cultural practices in the classes taught in Spanish and no reference to Colombian culture in classes taught in English, thus evidencing a belief in a complete separation of languages and cultures in the curriculum.

Main Contributions

Program Development and Evaluation

The situation reported by Brovetto et al. (2004) in Uruguay differs from the two previous accounts in that the type of bilingual program surveyed refers, on the one hand, to English-Spanish immersion programs created by the Uruguayan Ministry of Education in 2001 for state (public) school children from lower socio-economic groups and on the other to Portuguese-Spanish provision for children, from similar socio-economic backgrounds who live on the Uruguayan-Brazilian border. In the first case, the modality adopted was early partial immersion, while in the second, a type of two-way immersion was implemented, to cater for children whose first language was a variety of Portuguese, as well as those who spoke Spanish at home. Portuguese was not taught explicitly as a subject in the curriculum but was used for the teaching of content areas, such as Science.

In 2006, Cristina Banfi and Silvia Rettaroli carried out an extensive evaluation of the impact of the Uruguayan English-Spanish immersion program. This study was commissioned by the Uruguayan Government and financed by the World Bank. Its main aim was to assess the level of student English language proficiency with regard to reading and listening comprehension and oral expression in English. A secondary objective was to evaluate the cost-effectiveness of the bilingual program. Results from standardized tests as well as the perceptions of the actors involved, teachers, school administrators, school inspectors, and government authorities were included.

Based on the results of the quantitative and qualitative data, the researchers concluded that there was an overall positive perception of the program on the part of the participants, highlighting the illusion of “bringing together two universes which are practically separate: the prestige of the target language, on one hand, with children from the most disadvantaged social, cultural and economic backgrounds, on the other” (Banfi and Rettaroli 2006, p. 25). With regard to the level of English language proficiency reached by 4th and 5th grade pupils (the first two cohorts to participate in the bilingual program), the findings were that after 4 years they both had similar, satisfactory levels of performance: two-thirds of each group reached the level equivalent to or above low beginner on the American Council for the Teaching of Foreign Languages (ACTFL) scale, corresponding to levels A1 and A2 on the Common European Framework. ACTFL describes this as the suggested level for children after 5 years in a bilingual program. In relation to the cost-effectiveness of the program, it was found that this was much lower than in the private sector, the only other point of comparison for bilingual education in dominant languages in the country.

In the evaluation of the dual Spanish-Portuguese immersion program, 85 % of the parents interviewed reported that they were very satisfied with their children’s progress in the program. Moreover, 50 % referred to the possibility of their sons and daughters having better employment prospects if they were bilingual in the two

dominant languages. Some also said they were pleased that students had been able to “correct” their language errors resulting from language contact phenomena (Brovetto et al. 2007).

For their part, all the children who took part in the study said they were happy that they were able to learn Portuguese at school and made particularly positive references to Math and Science taught in Portuguese. Their teachers, though initially worried about the “mixing” of the two languages, acknowledged that the reality was very different. One of the Spanish teachers revealed that the students were able to transfer contents from one language area to the other. They also referred to the organization of teaching by means of “pedagogical pairs,” in which both the teacher of Spanish and the teacher of Portuguese were present in the classroom at the same time, as particularly useful and enriching (Brovetto et al. 2007).

Development of Literacy and Oracy

Studies focusing specifically on aspects of biliteracy² in bilingual education have been carried out in Ecuador, Colombia, and Paraguay. These will be briefly reviewed here. The first study (Simpson 2005) looks at the writing of first grade students in both English and Spanish in an enrichment bilingual program in Quito, Ecuador, in an attempt to discover whether there was evidence of an “elaborate style” of writing characteristic of Spanish written discourse in the samples examined. A second aim was to examine the possibility of reverse transfer of writing style from the foreign language (English), in which initial school literacy processes were carried out, to the children’s native language (Spanish).

The author came to the conclusion that there was no evidence of an elaborate writing style in the children’s narrative samples analyzed, probably due to the fact that the pupils concerned were very young and also because of the intensive literacy instruction in English they had received. She also found that although the students had more practice in writing in English and could use the language items and patterns they had learned without much difficulty, they wrote longer narratives with more confidence in Spanish. Nevertheless, on balance, the analysis revealed that the children exhibited similar syntactic ability in both of their languages.

In a study in Bogotá, Colombia, Claudia Ordoñez (2004, 2005) examined the bilingual proficiency (in English and Spanish) of a group of Colombian adolescents in oral narratives based on picture book prompts and compared these to the productions of monolingual Colombians (in Spanish) and adolescents from the USA (in English). The researcher found that while the narratives of both the monolingual and the bilingual students showed a similar range of variation in length, evaluation,

²For purposes of this discussion, biliteracy may be taken as “any and all instances in which communication occurs in two (or more) languages in or around writing” (Hornberger and Skilton-Sylvester 2000, pp. 96–98).

connection, and time representation, the productions of the bilinguals received lower holistic ratings and were shorter and less rich than those of their monolingual counterparts. The author admits that there may be linguistic and cultural reasons that explain these differences, such as different narrative conventions in different languages. However, she calls for more research into what she terms “the possible costs to the first language of acquiring a foreign one early in school” (Ordoñez 2005, p. 139), particularly in bilingual programs which do not explicitly recognize the importance of the first language in bilingual language development.

More recently, in a development showing certain similarities to the previous study, Isabel Tejada Sanchez (2014) conducted a longitudinal research project in order to establish the effect of both total time and intensity of exposure on the levels of student writing performance in English in two early immersion programs with different degrees of intensity of exposure which she termed “High Intensity” and “High Intensity +” with reference to the difference in the number of hours of student contact with English in the bilingual programs. By the end of the High Intensity programs, students had been exposed to a total of 7,002 h of English, while in the High Intensity + modality they had received a total of 8,760 h, 1,758 h more than in the former program. The study was carried out in a private bilingual school in Cali, Colombia, at secondary school level and involved the students writing short narratives after watching a clip from a silent film. After analysis of the results from both a quantitative and a qualitative perspective, the researcher came to the conclusion that the program with lower intensity showed better results, and thus, the number of accumulated hours of exposure was not a determinant of a higher level of writing performance when the students have reached a specific threshold level (6,000 h in this particular study).

In Paraguay, Susan Spezzini (2002, 2005) has carried out research into language learning variability in an elite immersion type, bilingual, Spanish-English, program in Asunción, also among adolescents. In an interesting conclusion, the author maintains that this type of immersion setting provides learners with more opportunities for developing academic language proficiency rather than oral communicative skills in the second language.

She noted that variability existed in students’ L2 oral output and comprehensibility and associated this with two main variables: gender and former schooling. She concluded that in spite of a long tradition of similarity in school experience, this evidence of variability in oral production “indicated that each student’s experience with learning and using English was a unique case” (Spezzini 2005, p. 90). Spezzini found that higher comprehensibility was related to frequency of opportunity for L2 use, either because of specific circumstances, such as travel abroad, or because of higher motivation to use English on a day-to-day basis within Paraguay.

Sociocultural Dimensions (Attitudes and Identities)

Another strand of work relating to research on bilingual education programs in South America has to do with the construction of attitudes and identities in bilingual

education programs. This shows certain similarities with recent work carried out in immersion programs at international level.

In the study referred to above, Spezzini (2002, 2005) shows that some students were conscious that their bilingual school language use reflected a particular “unique” social/group identity, as evidenced in the following observation,

The students at the American School of Asunción (ASA) have their own language. When we speak English, we speak ASA English and when we speak Spanish, we speak ASA Spanish. (Spezzini 2005, p. 87)

The author speculates that this might be evidence of the creation of a nonnative language variety based on covert prestige norms.

In Chile, Rowan Iversen (2005) has also been interested in individual learner differences in relation to affective variables. In a study in progress, she has compared nonlinguistic outcomes (attitudes, motivation, self-perceived communication apprehension or anxiety, and willingness to communicate) in two groups of 11th Grade students in schools in Santiago: one, an English immersion program, and the other, an intensive foreign language program. She found that the immersion students scored considerably higher in their willingness to communicate than the nonimmersion group; their motivation and attitudes were more positive, and they reported lower levels of anxiety in using the target language. However, the researcher also emphasized that care should be taken in generalizing these results to the state or public education sector, where students and their parents do not have such freedom of choice as in the private sector.

In a pioneering project in Armenia, Colombia, Silvia Valencia (2005a) examined the construction of social relations in bilingual programs at secondary school level, this time in the public sector. The researcher decided to explore how bilingual teaching and learning was carried out in difficult conditions (e.g., students who came to school without having had breakfast due to difficult family economic situations and without money to buy notebooks and dictionaries for the English class), particularly focusing on the building of social relations through bilingual talk in language lessons. She came to the conclusion that although the working relationship between teachers and students was largely constructive, if asymmetrical, “very few meaningful episodes of real communication were observed” (Valencia 2005b, p. 9).

There was also little recognition of students’ knowledge and beliefs by teachers in the lessons analyzed, and student asides were seen as disruptive of class activities. The researcher noted that teachers’ agendas were largely directed at complying with syllabus and policy requirements. The students colluded, at times, with the way the teachers constructed the lessons, either bidding for turns or taking the risk of going to the board. However, there was also evidence that at other times, they contested the teachers’ agendas, despite the latter’s privileged position of power.

Although technically the last study referenced in this section refers to a Latin American, rather than a South American perspective, as it was carried out in Mexico, it is included here as it focuses on the construction of identities of bilingual teachers

of English from indigenous communities in Oaxaca and thus acts as a lead into the following section. Mario López and Angeles Clemente (2011) carried out an ethnographic research project on the multilingual identities constructed and resisted socially by student-teachers of indigenous origin training to teach English in the Languages Faculty at the University of Oaxaca. By means of semistructured interviews, informal conversations, class observations, and data collected from student narrative essays, interactions between two professors from the Faculty and four indigenous student-teachers were set up and analyzed. The results of this study show that one of the most important aspects of student learning during these encounters between teachers and students was that “they discovered that they could talk to their teachers and to their fellow students about aspects of their identity that they had left [outside the classroom]” (López and Clemente 2011, p. 220). These included their indigenous origin (in particular, wearing traditional indigenous dress to school), speaking Spanish as a second language and defending their identities in different contexts. A further conclusion was that the university professors realized that they had incorporated a monoglossic perspective in their perception of these indigenous teachers of English, seeing them as deficient in their use of English in relation to international examinations based on comparisons with native speaker standards, rather than as emergent bilinguals and multilinguals.

Work in Progress

Links Between Bilingual Education for Dominant Language Speakers and Speakers of Indigenous Languages

As may be inferred from the above discussion, research in the field of bilingual education for dominant language speakers in South America has been characterized by a tendency to focus on microlevel studies carried out in one or two institutions, usually in the private sector. There have been few initiatives aimed at relating tendencies across bilingual modalities in different cultural contexts, particularly educational provision for indigenous communities, Creole speakers, and the different Deaf communities established in the area. However, this is now changing.

Enrique Hamel (2008) argues for the need to move from monolingualism to plurilingualism in Latin America, where diversity is assumed as a resource of enrichment and additive bilingualism is espoused. Instead of continuing the traditional divide established between bilingual education in dominant and in indigenous languages, Hamel argues for “a reciprocal, unbiased process of exchange and mutual learning [which] could foster the growth of multilingual sphere and the transition towards pluricultural nation states where cultural and linguistic diversity is seen as global enrichment” (Hamel 2008, p. 60). However, the author does not underestimate the difficulties inherent in this proposal as in the past, there has been little cooperation and interchange across the divide. Hamel suggests that “concrete implementation [of integrated language and education policies for bilingual education]

will probably depend on local initiatives that manage to overcome existing barriers” (Hamel 2008, p. 90).

The traditional division between bilingual education programs offered to speakers of majority languages and those available to minority language speakers has also been researched in Colombia (de Mejía 2005b, de Mejía and Montes Rodríguez 2008). In similar terms to Hamel, the authors argue that this divide should be reconsidered within a wider, integrated vision of bilingual provision. We maintain that there are significant areas of convergence between these different traditions in relation to issues such as the maintenance of cultural identity, the status and development of the first language, and the importance of contextual factors in the design and modification of bilingual education programs. More recently, there has been work carried out (Ossa-Parra and de Mejía 2013) on the different ways that bilingual education provision is presented in official documents and decrees in both majority and minority traditions in Colombia, with a view to identifying points of contact and areas of divergence between the two.

Teacher Education

Another fairly recent, though important, development is a concern with teacher training and education specifically focused on bilingual education provision. Banfi and Rettaroli (2008) have discussed aspects of teacher training and development in different bilingual education contexts in Argentina, such as indigenous language contexts, bilingual programs for the Deaf, bilingual education provision in contact language situations, as well as in international schools and state bilingual institutions. One of their interests in their study is examining how far teachers who work in these different types of contexts are expected to show competence in areas other than language proficiency: areas such as cultural knowledge, content knowledge, pedagogical expertise, and knowledge of the principles of bilingualism and bilingual education. In particular, the authors argue that as there is a commonly accepted assumption that students and teachers share the same culture, there is often a lack of recognition of the possible diversity of cultural backgrounds. For this reason, Banfi and Rettaroli (2008, p. 161) believe that teachers “should themselves have had access to intercultural reflection instances. . . [and] that personal as well as professional development is called for, to enhance the teacher’s intercultural understanding.” For her part, Fernanda Liberali (2013) has documented a multicultural education research project carried out in Brazil with preservice bilingual education teacher trainees in public (state) schools catering for underprivileged children, which involved planning, teaching, and evaluating classes together with teacher-educators and the use of both English and Portuguese in the classroom. This was followed by group discussions on key aspects of the sessions. Liberali highlights the importance of the new roles assumed by both student-teachers and teacher-educators. The students reported on their surprise at finding how much they could accomplish in the target language (English) while the project coordinator recognized her need to learn more about bilingual education as a result of the interaction during the study.

Problems and Difficulties

One of the problems which have surfaced in relation to bilingual education in dominant languages in South America is that much of what has been written is available in unpublished theses, which makes it difficult for local access. In addition, the fact that these are usually written in Spanish or in Portuguese creates additional difficulties for many students, teachers, and researchers who work in an Anglo American context. This is gradually changing, and the fact that this volume includes three entries relating to Latin America is encouraging.

Another source of difficulty is that of charting developments in bilingual education in dominant languages, as opposed to foreign language teaching and learning per se. As many teachers in bilingual contexts have been trained as EFL or ESL teachers, it is often difficult for them to take on board the wider perspective of bilingual or multilingual education provision, including the recognition of the key role of learners' first languages. This monoglossic tendency has limited initiatives both in policy and in classroom practice, as can be seen in the change of name in Colombia for the language program for primary and secondary school students from "The National Bilingual Programme" (2005–2014) to "The National English Programme" (2015–2025), thus excluding other international languages, such as French and German, as well as Indigenous and Creole languages from the official curriculum.

Future Directions

As can be seen, studies of bilingual education in dominant languages are very much in their infancy in South America. There are certain similarities that can be noted in relation to the early development of the French Immersion programs in Canada: a focus on the description of different program types, comparisons between students in monolingual and bilingual educational contexts, and a concern with the level of foreign language proficiency achieved by students in bilingual programs.

There is, however, at the same time, evidence of a trend towards researching the sociocultural and nonlinguistic aspects of bilingual education programs, thus showing a consciousness of the situated nature of these initiatives and recognition of their variability, not only at institutional level but also in the individual experiences of students in the development of their personal bilingual trajectory. A recent novel strand of research is also beginning to focus on interrelationships between bilingual education provision in different educational and cultural contexts.

It would seem, therefore, that work on enrichment bilingual education in both dominant and minority languages in South America is gaining momentum and is moving forward in important ways. There is considerable interest in developments in this area, as can be seen by the creation in 2004 of a series of international symposia on bilingualism and bilingual education in Latin America in Buenos Aires, which have continued to the present day. Researchers and academics working in this part of the world are thus beginning to have an impact on developments in the field of

bilingual education and a growing consciousness of the importance of their contribution to international debate.

Cross-References

- [Bilingual Education for Indigenous Peoples in Mexico](#)

Related Articles in the Encyclopedia of Language and Education

- Anne-Marie de Mejía: [Researching Developing Discourses and Competences in Immersion Classrooms](#). In Volume: [Language and Technology](#)
- L. E. López: [Decolonization and Bilingual/Intercultural Education](#). In Volume: [Language Policy and Political Issues in Education](#)
- O. García: [Multilingual Language Awareness and Teacher Education](#). In Volume: [Language Awareness and Multilingualism](#)
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Indigenous Bilingual and Revitalization-Immersion Education in Canada and the USA

Onowa McIvor and Teresa L. McCarty

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Abstract

The sociolinguistic landscape in Native North America is defined by the combined realities of language loss and reclamation. In these contexts there is an overwhelming trend toward revitalization-immersion education undertaken in and out of school. The US Census data report 169 Native American languages spoken by 370,000 Native people; the Canadian Census data enumerate 240,815 Aboriginal people who report Aboriginal language conversational proficiency. An encouraging statistic in Canada has more Aboriginal people reporting Aboriginal language conversational proficiency than those reporting an Aboriginal

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mother tongue, indicating that increasing numbers of Aboriginal language speakers in Canada are second language learners. Pairing linguistic diversity with increasing urbanization and diaspora realities creates additional challenges for Indigenous revitalization-immersion education, as does the diversity of school systems that Native students attend. Public schools – by far the most common school type – tend to have few Native teachers and minimal or no Native language and culture content. Given this sociolinguistic, demographic, and educational profile, this chapter provides an overview of historical and contemporary Indigenous language policies and practices across regions and within the two nation-states. Key cases are highlighted. Despite the challenges, Indigenous peoples in Canada and the USA are finding creative ways to bring their languages into new domains and new generations through Indigenous bilingual and revitalization-immersion education.

Keywords

Indigenous education • Aboriginal languages • Native American languages • Language revitalization • Immersion education

Introduction

The sociolinguistic landscape in Native North America is defined by the dual realities of language loss and reclamation. In these dynamic settings, the overwhelming trend is toward Indigenous language immersion or revitalization-immersion (cf. García 2009, pp. 247–251), “methods used to teach a language by using only that language” in everyday contexts (McIvor 2006, p. 5).

Those contexts are characterized by tremendous cultural and linguistic diversity coupled with relatively small numbers of people. Recent US Census data report 5.2 million American Indian and Alaska Native people (1.7 % of the population) and 1.2 million Native Hawaiian and other Pacific Islanders (0.4 % of the population). The US Census also reports 169 Native American languages spoken by 370,000 people (Siebens and Julian 2011). Recent Canadian Census data enumerate 1.4 million First Nations, Métis, and Inuit people (4.3 % of the population), of whom 240,815 (17.2 % of the population) reported being able to converse in an Aboriginal language (Statistics Canada 2011a, b). In Canada, more Aboriginal people report conversational proficiency in an Aboriginal language than those reporting an Aboriginal mother tongue, indicating that more than 20 % of Aboriginal language speakers are second language learners (Statistics Canada 2011a).

Pairing this linguistic diversity with increasing urbanization and diaspora realities creates additional challenges for immersion education for Indigenous peoples. This is further complicated by the various school systems Native students attend: federally run schools, federally funded but tribally controlled schools, parochial and other private schools, and public schools – by far the most common type serving Native students. Tribally operated schools in Canada, and parochial and public schools in

both countries, are largely English medium. The exceptions are some public charter schools in the USA, which, by emphasizing Indigenous language and culture instruction, play a growing role in Native peoples' efforts to regain control over their children's schooling. Given this intra- and international diversity, this chapter provides an overview of historical and contemporary policies and practices across regions and within each nation-state, while highlighting key cases.

Early Developments

Multilingualism in Native North America long predates the European invasion and was common as a trade tool and for intertribal communication. For example, Philips (2011) documents dozens of Indigenous languages used along the Pacific Northwest Coast and inland territories during the eighteenth and nineteenth centuries, including many from outside the region such as Cree, Iroquois, Hawaiian, and Plains Sign languages.

Autochthonous literacies also flourished, including non-graphocentric systems such as winter counts (pictographic calendars), and alphabetic and syllabic writing systems. One such writing system is Cree syllabics, created in the early to mid-1800s and most often credited to Reverend James Evans (Macdonald 2011). Studies have shown that early use of syllabics was prolific among Cree communities, such that by the late eighteenth century, most Cree adults were literate in this writing system (Rogers 2005). Syllabic writing systems also constituted the foundation for early Cherokee and Choctaw bilingual schools in the southeastern USA, and an alphabetic writing system flourished under the Indigenous Hawaiian monarchy. In the latter cases, bilingual schooling in the Indigenous languages produced literacy rates that far exceeded those of the surrounding non-Native population. During the 1800s, for instance, the Hawaiian literacy rate "reached 90 %, 'the highest in the nineteenth-century world'" (Grenoble and Whaley 2006, p. 95).

With the encroachment of settler societies, Indigenous education practices came under assault. As former British colonies, Canada and the USA have followed parallel trajectories in their policies toward Indigenous peoples and languages. The US 1819 Civilization Fund Act supported missionary schooling, with the goal of exterminating Native American languages and lifeways to clear the path for the seizure of Native lands. In Canada, the Indian Act of 1876 began a deliberate course of removal, genocide, and linguicide. In both national settings, by the late nineteenth and early twentieth centuries, punitive, segregated schooling in English- or French-medium residential schools became a primary tool for exerting federal linguistic and territorial control.

Amidst the Civil Rights, American Indian, and progressive education movements of the late twentieth century, these policies and practices began to change. In the USA, the 1972 Indian Education Act funded Native language and culture programs, and the 1975 Indian Self-Determination and Education Assistance Act provided for Native American control over Native-serving schools. In Canada, Indigenous

resistance peaked in a 1972 policy brief published by the National Indian Brotherhood (NIB), *Indian Control of Indian Education*, widely recognized as a “clear . . . call for an education system based on Aboriginal values and priorities” (Fettes 1998, p. 122).

By the early 1970s, 74 federally funded American Indian and Alaska Native bilingual education programs operated in the USA (Spolsky 1974). One precedent-setting example was the K-12 Navajo bilingual-biliteracy program at Rock Point, Arizona. At the time, nearly all Rock Point students entered school speaking Navajo as a primary language. On the theory that learning to read in the child’s first language would result in enhanced literacy learning, Rock Point offered initial literacy in Navajo. In longitudinal assessments, Rock Point students consistently outperformed their peers in English-medium programs, and achievement gains were cumulative. Equally important, Rock Point students “had considerably more self-confidence and pride” (Holm and Holm 1995, p. 148). With the passage of the Indian Education Act and the Indian Self-Determination Act, programs using similar approaches were implemented in Native American community-controlled schools throughout the USA. In Canada, MacKenzie (1985) reports the first Indigenous-medium schools in eastern Cree territories. Indigenous-medium schooling experienced a resurgence following the *Indian Control of Indian Education* policy brief (NIB 1972), which brought syllabic-based Cree-medium education to a formal school setting for the first time.

Though significant, conventional bilingual education programs using Native American languages have not been sufficient to counter the myriad forces of language displacement and loss. As Hermes, Bang, and Marin (2012) explain, “While there are communities in which English has not claimed ownership, in many of our communities, children and families have no choice” but to use English in their everyday language practices (p. 398). This situation has given rise to a widespread language reclamation and revitalization movement, represented in the USA by the 1990/1992 Native American Languages Act and the 2006 Esther Martinez Native American Languages Preservation Act and in Canada by the Task Force on Aboriginal Languages and Cultures (2005), the 2007 Nunavut Official Languages Act, and the Inuit Language Protection Act. This movement is also reflected in the creation and implementation of Indigenous revitalization-immersion programs, to which we now turn.

Major Contributions

Increasingly Native North American communities favor immersion schooling solely because most Indigenous children no longer enter school proficient in their ancestral language. Bear Nicholas asserts, “As long as school for aboriginal children is conducted primarily in English and French, the colonial project of linguicide and cultural destruction will continue” (2013, p. 1). This section details examples of the longest-operating and most successful Indigenous bilingual and revitalization-immersion schooling across Canada and the USA.

Indigenous Bilingual/Revitalization-Immersion Schooling in Canada

Two contrasting Indigenous language education scenarios exist in Canada. Less common are programs that serve Indigenous children who are fully proficient in their ancestral language, providing instruction in their ancestral language and a colonial language (English or French). These programs are fairly exclusive to the far northern regions of Canada. Communities that subscribe to this schooling method generally share three traits: (1) they are small and geographically isolated; (2) one main Indigenous language exists in the area, or a decision has been made to support one language; and (3) the Indigenous language is the primary language of the community, with 90 % or more of the residents being both Indigenous and proficient in the Indigenous language (Aylward 2010; McGregor 2012; Osborne et al. 2009). Unamen Shipu, Québec, is one community that fits this profile. Guèvremont and Kohen (2012) report 99 % of the Innu residents speak Innu, “from children through to elders” (p. 96). This community has chosen transitional bilingual education, starting with a 50/50 split of the day spent in Innu and French, the colonial language of choice in the region. In the students’ second school year, French is the language of instruction with Innu as a subject for 45 minutes, two to three times per week (Guèvremont and Kohen 2012).

Similarly, the Inuit people of Nunavik, Québec, have implemented transitional bilingual education whereby children receive full immersion from kindergarten to grade 3 and then transition to English or French in grade 4. According to Osborne et al. (2009), while this community would prefer full immersion to continue beyond grade 3, this aim has been constrained by practical barriers such as lack of curricula for higher grades and insufficient numbers of Inuit-speaking teachers.

More common in Canada are revitalization-immersion schools with the intent of producing bi-/multilingual outcomes for children who arrive proficient in one or both colonial languages but lack proficiency in their ancestral tongue. Four Indigenous groups in Canada are featured who offer this more prominent type of schooling – from the Mohawk and Mi’kmaq of the east to Cree communities in Saskatchewan and Alberta and to British Columbia’s interior Secwepemc Nation. Although other programs exist, these are the longest-running and best-known flagship immersion schools. However, none is well documented. At least one region – the Yukon Territory – is reported as having “no immersion programmes available in schools for any Yukon First Nations languages” (Ferguson 2010, p. 157).

The first reported Indigenous language immersion school in Canada is the Mohawk of Kahnawake, which began in 1970 (Jacobs 1998). Revitalization of Kanien’keha (the Mohawk language) was accelerated by a Native teacher preparation program at the University of Québec, in which preservice teachers created a practical writing system and curriculum designed to teach “children a way of thinking, not simply a translating skill” (Mithun and Chafe 1987, pp. 27–28). In 2015, the Kahnawake Education Center (KEC) reported a kindergarten through grade 6 immersion school, Karonhianonhnha Tsi Ionterihwaiensthakwa, and the Kahnawake Survival School for students in grades 7–11, which includes the teaching of Mohawk language, history, and culture (www.kec.qcc.com/schools).

The Mohawk people are also well known for their adult Indigenous immersion programs, which, in tandem with Mohawk immersion preschools, are producing a new generation of adult and child speakers (Maracle et al. 2011).

The Mi'kmaq of the eastern Canadian coast are also known for the success of their K-12 Mi'kmaq language immersion programs. One such school is the Eskasoni Elementary and Middle School in Nova Scotia, which offers preschool to grade 2 full immersion before transitioning to the English-medium program (www.ekasonischool.ca/profile). Osborne et al. (2011) studied another Mi'kmaq school, Kina'matnewey, in which students are "taught each of their core subjects...in Mi'kmaq throughout the school year" (p. 205). This research focused on the Mi'kmaq and English language outcomes for students in an immersion program versus those in a Mi'kmaq second language program (defined as core subjects taught in English with Mi'kmaq as a second language for a minimum of 1 hour per day). The study also examined students' preparedness for postsecondary education in the colonial language (English). The research revealed that "students in the immersion program not only had stronger Mi'kmaq language skills compared to students in the second language program, but students within both programs ultimately had the same level of English" (Osborne et al. 2011, p. 200). As Battiste (2013) notes, "with results like these, one wonders why English-language programming for students who still have their Indigenous language used in the community would be used at all as the only language of instruction" (p. 93).

Cree is the largest language group in Canada. There are at least five distinct dialects that span as far eastward as Québec and reach the foothills of the Rocky Mountains in British Columbia to the west. Two Cree immersion schools have garnered scholarly attention: the Atikameg Sovereign School at Whitefish Lake First Nation in northern Alberta and the Onion Lake Cree Nation Kihew Waciston School in Saskatchewan. Bell et al. (2004) report that the Atikameg School offers a pre-K to grade 2 program, with a high level of Cree proficiency within the community. Onion Lake Cree Nation serves 65 students in full-immersion classes with the intent of developing a full-immersion curriculum. In 2015, Onion Lake Cree Nation reported serving 200 students in a full-immersion school (www.onionlake.ca/education/kihew-waciston).

A fourth example of long-standing, successful Indigenous language immersion schooling in Canada is the Chief Atahm School near Chase, British Columbia, a region in which Secwepemc is spoken. Secwepemc revitalization began approximately 20 years ago with the launch of a language nest preschool founded by a few community mothers and elders (Michel 2012). This evolved into a kindergarten immersion program that extended through grade 8. The school continues to operate successfully, with a portion of the community children attending. Most of the school staff are adult second language learners who have gained teaching degrees and high levels of proficiency sufficient to develop curriculum and teach all subjects in the Secwepemc language. The staff offers annual summer retreats for language teachers and other communities interested in starting immersion programs. This is the only known full-immersion school in British Columbia – a province that is home to more than half of all Indigenous languages in Canada (First People's Cultural Council

[FPCC] 2014). Chief Atahm provides a strong example of the success that is possible in immersion schooling, even within a small community with a relatively small number of speakers and students.

Indigenous Bilingual/Revitalization-Immersion Schooling in the USA

Like Canada, there are very few Indigenous language maintenance bilingual education programs in the USA, and most are also concentrated in the Far North. Wyman and colleagues (2010) report on Yup'ik language maintenance in the Lower Kuskokwim School District (LKSD) in southwestern Alaska. In 1995, nearly all the villages served by LKSD were Yup'ik speaking, but by 2007, "educators were witnessing early signs of language shift" (Wyman et al. 2010, p. 30). These researchers found that the schools showing the highest achievement gains were those that "used Yup'ik as a consistent language of instruction in grades K-3 for 10 or more years" (2010, p. 41). In contrast, elementary schools that split their programming into separate Yup'ik and English strands witnessed the greatest evidence of language shift and lower academic gains among students.

Indigenous revitalization-immersion in the USA began in Hawai'i in 1983, when a small group of parents and language activists established the 'Aha Pūnana Leo (Hawaiian language nest) nonprofit organization. At the time, the number of children speaking Hawaiian had dwindled to fewer than 50 statewide (Wilson and Kamanā 2011). A grassroots Hawaiian "renaissance" had established Hawaiian as co-official with English in 1978. With support from Māori language educators in Aotearoa/New Zealand and Mohawk educators in Canada, the Pūnana Leo pre-schools enabled children to interact with fluent speakers entirely in Hawaiian, with the goal of cultivating new child speakers in much the same way as occurred in the home in earlier generations (Wilson and Kamanā 2011). As their children prepared to enter kindergarten, Pūnana Leo parents successfully lobbied for Hawaiian-medium elementary school tracks, and Hawaiian-medium schooling spread horizontally to other communities and vertically by grade. Today, Hawaiian-medium education serves 2,000 students statewide in a coordinated set of schools, beginning with the preschools and moving through full Hawaiian-medium elementary and secondary education.

One such school is the Nāwahīokalani'ōpu'u (Nāwahī) Laboratory School in Hilo, a full-immersion, early childhood through high school program affiliated with the University of Hawai'i, Hilo, and 'Aha Pūnana Leo. The school teaches all subjects through Hawaiian, offering a college preparatory curriculum that explicitly prioritizes Hawaiian over English (Wilson and Kamanā 2011). Although Hawaiian language revitalization has been the priority, Nāwahī has yielded impressive English language results, with students surpassing their non-immersion peers on English standardized tests and outperforming the state average on high school graduation, college attendance, and academic honors (Wilson and Kamanā 2011). On a larger scale, the Hawaiian language revitalization movement is widely recognized as one of the most effective in the world, with more than 15,000 Hawaiians reporting that they

use or understand Hawaiian. In addition to pre-K-12 schools, Hawaiian is widely taught in Hawaiian universities and has extended into nonschool domains such as Hawaiian-speaking sports.

In the southwestern USA, the Navajo Nation has been a primary site for Native language immersion programs (almost half of all self-reported speakers of Native American languages in the USA are Navajo). One of the most well-established programs is Tséhootsooí Diné Bi'ólta' (TDB), The Navajo School at the Meadow Between the Rocks, located in Fort Defiance, Arizona. In 1986, the Fort Defiance Elementary School launched a voluntary Navajo immersion program. At the time, most Fort Defiance students entered school speaking English as a primary language, and immersion represented "the only...program with some chance of success" at revitalizing the language among this group of children (Arviso and Holm 2001, p. 205). Program data showed that as children learned Navajo as a second language, their test performance in English also improved; immersion students performed better than non-immersion students on English writing assessments and were "way ahead" in mathematics (Holm and Holm 1995).

By 2003, the Fort Defiance immersion program had blossomed into the K-8 TDB School. Like Hawaiian immersion, a key program component is the involvement of parents and elders, who commit to spending time interacting with their children in Navajo after school. Longitudinal data show that TDB students consistently outperform their peers in English-only classrooms on local and state assessments of English reading, writing, and mathematics while also developing strong Navajo oral language and literacy skills (Johnson and Legatz 2006). Further, program cofounder Wayne Holm states, "What the children and their parents taught us was that Navajo immersion gave students Navajo pride in an urbanizing situation in which many students were not proud to be Navajo" (2006, p. 33).

As Native students increasingly attend off-reservation public schools, it is important to examine language revitalization efforts in urban school settings. A leading example is the K-5 Puente de Hózhó (Bridge of Beauty) Trilingual Magnet School in Flagstaff, Arizona. The school's name mirrors its mission "to connect and celebrate the three predominant languages and cultures" of this urban community (Fillerup 2011, p. 150). To do this, the school offers a conventional Spanish-English dual immersion program and "one-way" Navajo revitalization-immersion for English-dominant Navajo students. In a national study of promising practices in American Indian/Alaska Native education (McCarty 2012), Puente de Hózhó (PdH) was identified as an exemplar for four reasons: (1) it explicitly rejects the remedial status historically accorded to bilingual and Indigenous education, emphasizing the value of multilingual, multicultural competence for all learners; (2) bilingual/immersion education is central, not auxiliary, to the curriculum; (3) like Nāwahī and TDB, PdH has exceptionally high levels of parent involvement – a practice widely associated with enhanced student achievement but rarely ascribed to Native families; and (4) PdH has consistently met state standards, with its students outperforming comparable peers in monolingual English programs in English language arts,

mathematics, and English reading. PdH provides compelling evidence that making Indigenous students' languages and cultures "the centerpiece of instruction can pay astounding dividends academically, linguistically, and socially" (Fillerup 2011, p. 164).

Work in Progress

The research and programs profiled above demonstrate the proactive role that schools can play in language reclamation/revitalization when Native parents and community members control the curriculum and its implementation. As Holm (2006) notes, "Schools cannot save a language or culture," but they can "make it possible for students to find new and more meaningful ways of being [Indigenous] in the future" (p. 36). This work also testifies to the efficacy of full-immersion models, which produce graduates with high levels of Indigenous language proficiency and "academic and majority language outcomes equal to or surpassing those of peers in nonimmersion programs" (Wilson and Kamanā 2011, p. 46). Equally important, these programs have been shown to enhance cultural pride and intergenerational connections, and transform hegemonic expectations about Indigenous languages and cultures, from loss and extinction to resilience and self-empowerment.

These outcomes reflect and reinforce language planning underway at the national, state/provincial, and school/community/family levels. In the USA this includes provisions for Native American language revitalization-immersion programs in the 2015 Every Student Succeeds Act, the creation of a separate class of charter schools for Native language immersion in Alaska, Montana's recent support for K-12 Native language immersion in state public schools, and Arizona's Native American Language Certification Policy whereby tribes, in partnership with the state, certify Native language teachers. In Canada, parallel initiatives include the *National First Nations Language Strategy* adopted by the Assembly of First Nations (McDonald 2007), the FPCC's *A Guide to Language Planning and Policy for [British Columbia] First Nations Communities* (Franks and Gessner 2013), and the 2010 *Northwest Territories Aboriginal Language Plan* outlining state and Indigenous communities' shared responsibilities in Aboriginal language maintenance.

Implementing these language policies requires developing new education infrastructure support (Ball and McIvor 2013). Key needs are for qualified teachers who speak and understand the language and for high-quality teaching materials. One response has been the creation of Indigenous language teacher training programs aimed at cultivating second language learners while preparing them to develop curricula and teach in immersion settings. Bear Nicholas (2009) reports on the "first ever, native language immersion teacher-training programme in Canada," established in New Brunswick in 2001, which prepares Maliseet and Mi'kmaq teachers. These teachers have been "critical," Bear Nicholas states, to advocate for and implement immersion programs in maritime Indigenous communities (2009, p. 231).

Another program is at the University of Victoria in British Columbia, Canada, where language learners concurrently study to be teachers in their own communities in order to remain close to mentor-speakers and to begin building the immersion programs their communities desire (www.uvic.ca/education/prospective/indigenous/index.php). Yet another leading program is the Kahuawaiola Indigenous Teacher Education Program at the University of Hawai'i, Hilo, which involves teacher candidates in intensive immersion and a year of field-based training at Nāwahī School, followed by a year of student teaching in Hawaiian-medium schools (Wilson and Kawai'ae'a 2007). While not solely focused on immersion, other well-established teacher preparation and materials development programs that have been crucial to the Indigenous language reclamation movement include the long-lived American Indian Language Development Institute (AILDI) at the University of Arizona (www.aildi.arizona.edu), the Breath of Life Archival Institute for Indigenous Languages (http://www.endangeredlanguagefund.org/BOL_2013_home.php), and the Canadian Indigenous Languages and Literacy Development Institute (CILLDI) at the University of Alberta (www.cilldi.ualbera.ca).

Successful language revitalization also requires parents committed to enrolling their children in immersion programming and supporting language learning at home. As Hinton (2013) notes, many language revitalizers believe “the most important locus of . . . revitalization is not in the schools, but rather the home, . . . the primary place where language acquisition occurs” (p. xiv). Hinton (2013) documents the language reacquisition strategies of parents and families involved in this movement, such as Daryl Baldwin (Miami) and Jessie Little Doe Baird (Wampanoag), whose ancestral languages had not been spoken for many decades, and Phil and Elaina Albers (Karuk), who, by apprenticing with a master language teacher/elder, made Karuk the language of their home. Family efforts have expanded to the community through classes, language documentation, collaborations with academic linguists, group meetings with elders, and language immersion summer camps. Like school-based efforts, this work challenges notions of language “extinction” and “death” (Leonard 2011), as languages that have not been spoken for as much as 150 years are being revived.

A fourth language reclamation/revitalization focus is the creative use of educational technologies. Hermes et al. (2012) report on design research with Ojibwe communities in which improvised movies based on elders' storytelling and naturally occurring speech during summer language camps provided new pedagogic resources for use inside and outside of school. “Repurposing” technology for language revitalization “opened spaces for the integration of Indigenous epistemologies and axiologies in learning materials” (2012, pp. 395–396). Adcock (2014) describes a host of computer-assisted technologies to record, preserve, and teach Native languages, including Cherokee claymation (stop motion animation using clay figures) animated films, Rosetta Stone software, web pages, newsletters, fonts, online radio programs, and bilingual talking dictionaries. Such projects mesh the goals of language documentation and community-based revitalization, emphasizing the need for – and benefits of – “teamwork across all stakeholders” (Penfield and Tucker 2011, p. 291).

Problems and Difficulties

Despite tremendous efforts by Indigenous communities, educational organizations, and academics, a multitude of challenges to successful Indigenous bilingual/immersion schooling remain. The most obvious is the declining number of Indigenous language speakers. Most first language speakers are elders, and efforts to cultivate new speakers are not keeping pace with the rate of decline (for one regional example, see FPCC 2014). This is the crux of the often-discussed “race against time” which has made Indigenous language revitalization a paramount educational goal.

One response to this imperative has been language documentation, preserving spoken language using sophisticated recording equipment. For the most part, documentation has remained the purview of academic linguists. Tensions exist over whether documentation “fossilizes” Indigenous languages and disregards community-driven language education and revitalization goals. For communities with a handful of Native speakers, the dilemma may be whether to record those speakers’ speech or immerse new learners in their presence through education efforts (e.g., the master-apprentice approach described in Hinton 2013). Many language activists argue that when there are so few speakers, their efforts should be invested in family- and community-based language planning, rather than in schools. Language documentation does not always produce accessible, usable materials for new learners or beginning speakers and rather uses valuable elder-speaker time and energy. To resolve these dilemmas, Penfield and Tucker (2011) call for greater collaboration between applied linguists and Indigenous community members and a retooling of skill sets, such that second language pedagogy is effectively linked to community-driven revitalization goals.

Creating new generations of speakers – both children and adults – also requires a corps of adult speakers who are prepared to teach in bilingual and immersion programs and schools. As illustrated by programs such as AILDI and CILLDI, postsecondary institutions are answering this call, yet this also requires expertise within those institutions in Indigenous second language learning and the ability to transfer that knowledge to effective programming. A new generation of Indigenous scholars and teacher educators with this combination of expertise is evident, but the need for more such scholar-practitioners is imperative.

For bilingual and revitalization-immersion education to be successful and sustainable also requires parents who understand the value of this type of schooling and are ideologically committed to it. Many scholars note the conundrum of parental fears of their children being “left behind” by their peers in mainstream schools. In Wyman et al.’s (2010) Yup’ik study, “parents expressed concern that Yup’ik programming might be holding their children back” (p. 38). As a consequence, these Yup’ik-speaking parents “started speaking English to their children before they even [started] school” (Wyman et al. 2010, p. 40).

Communities and school boards have much work to do to educate parents about the benefits of bilingual and revitalization-immersion schooling. Wyman et al. (2010) point to “direct evidence” that Yup’ik-serving schools demonstrating the highest English test gains were those that “used Yup’ik consistently as a primary

language of instruction” (p. 40). Comparing English language outcomes for students enrolled in a Mi’kmaq immersion program and a Mi’kmaq-as-a-second-language program, Osborne et al. (2011) found similarly that the students in both programs demonstrated equivalent levels of English ability, while Mi’kmaq immersion students (not surprisingly) also developed stronger Mi’kmaq skills. These researchers concluded that, “Immersion programs can simultaneously revitalize a threatened language and prepare students for success in mainstream society” (p. 100).

Additional challenges include the great diversity and vast geographic span of Indigenous peoples and languages throughout the USA and Canada. The challenges of corpus planning – developing practical writing systems, teaching materials, etc. – are exacerbated by geographic barriers between linguistically related communities. At the same time, the growing trend toward urbanization (60 % of Canadian Aboriginal people live in cities and more than 80 % of Native people in the USA live outside tribal lands) raises questions for urban schools about which language(s) to privilege and how to provide Indigenous language support. Baloy (2011) posits that the local languages are given priority in revitalization efforts in keeping with Indigenous protocols of honoring one’s local hosts. However, in most urban public school settings, Indigenous language support is lacking.

Finally, a profound challenge is the lack of supportive macro-level policies coupled with diffuse ideological forces favoring dominant languages and speakers. This both reflects and reproduces racialized linguistic discrimination and pedagogic practices that marginalize Indigenous languages. In the USA, numerous scholars describe the devastating impacts of high-stakes testing policies on the teaching of Indigenous languages and Indigenous educational and linguistic sovereignty. Multilevel policy changes are needed to better support communities in undertaking bilingual and immersion schooling. As Sarkar and Lavoie (2014) express, “These policies would...honour the linguistic traditions of the ancestors...[.] respect the...wishes of parents and families to preserve those traditions in healthy and multilingual communities [and] support children’s potential to grow up as multiply-identified individuals” (p. 100). Such policies are supported by international conventions such as the United Nations 2007 *Declaration on the Rights of Indigenous Peoples* (www.un.org/esa/socdev/unpfii/documents/DRIPS_en.pdf) and the desires of Indigenous peoples themselves. As former Assembly of First Nations Chief Shawn A-in-chut Atleo (2013, p. 3) writes, “First Nations children must...be nurtured in an environment that affirms their dignity, rights, and identity, including their languages and cultures” (p. 3). He adds that this requires that education systems are supported and funded to achieve this overriding goal.

Future Directions

This chapter has documented the shift in focus from transitional and maintenance bilingual schooling to revitalization-immersion education, including school-, family-, and community-based initiatives. As Indigenous language reclamation has grown as both a grassroots movement and a scholarly discipline, greater attention is being paid

to the reciprocal contributions of the field of second language acquisition. These linkages in scholarship and practice are evident in the emerging field of family language policy (FLP), defined as “explicit and overt planning [of] language use within the home among family members” (King et al. 2011, p. 907). Hinton (2013) documents families around the world who are creating sites of immersion in their kitchens and living rooms. In these cases, FLPs create sanctuaries for Indigenous language learning and use within the intimacy of family homes, long held by scholars such as Fishman (1991) to be the “bastion” of intergenerational language transmission. These family-based methods prepare children to enter revitalization-immersion schooling while reinforcing language learning at home at the end of the school day. Other new approaches include “language houses” where small groups of learners live together for 3–6 months or more, immersing themselves in the language with the help of proficient speakers and other curriculum resources (Johnson 2014), and “language pods” in which learners gather to discuss preplanned topics, conversing only in the Indigenous language (Hinton 2013).

Increasing scholarly attention is also being paid to the crucial role of youth in language revitalization. New youth research is documenting the fallacy that Indigenous youth simply “abandon” their heritage language in favor of dominant languages. As Wyman et al. (2014) note, “many youth share adult allegiances to . . . maintaining Indigenous languages as part of Indigenous knowledge systems and ways of being” (p. 6). Yet youth are often positioned in challenging ways that cast their “incomplete” Indigenous language practices as problematic but charge them with the “daunting task” of “carrying their language into the future” (Wyman et al. 2010, p. 6). A related issue is how to convince youth that their language has worth and finding ways to demonstrate spheres for Indigenous language use outside the classroom. While many youth clearly feel the connection to their culture while learning their language (see, e.g., Wyman et al.’s [2014] discussion of youth “yearnings” for their heritage language), the influences of popular media in dominant languages can be overwhelming and detrimental to language revitalization. Youth need contemporary contexts for heritage language use; they need to be able to say “text me” and “later!” in the Indigenous language in order to reconcile their identities within the various domains in which they live. This requires corpus planning (e.g., relexification) at the school and community levels.

Finally, even as there is growing recognition of the potential of school-, family-, and community-based language reclamation efforts to reverse language loss, researchers are beginning to document the academic benefits of such efforts, including achievement in dominant language domains. Much more needs to be known about “the factors that contribute specifically to the educational effectiveness” of Indigenous-medium programs (Hill and May 2011, p. 162).

Following a fairly dark period of demise in the health of Indigenous languages, there is a growing focus and renewed vitality reflected in the creation of new speakers through a variety of methods. One reality is the growing presence of Indigenous languages in hegemonically “unexpected places” (Webster and Peterson 2011), including urban centers (Baloy 2011) and popular media created by Indigenous community members. The shift from endangerment to revitalization, and the

creation of new speakers, has been described as a “new sociolinguistic order” (O’Rourke et al. 2015). Revitalization-immersion schooling has been fundamental in constructing this new order, as have extracurricular family- and community-based efforts. These language planning efforts challenge conventional notions of speakerhood, fluency, and bounded geographic territories of language acquisition and use. Instead, there is growing recognition of the multisited, heteroglossic, and hybrid character of Indigenous language practices (Webster and Peterson 2011). Rather than hindrances to language revitalization, these complex sociolinguistic characteristics are resources to be cultivated. As Indigenous communities and their non-Indigenous allies work together toward this goal, we can expect to see continued innovations in bilingual and revitalization-immersion schooling and an ever-growing presence of new Indigenous language speakers.

Cross-References

- ▶ [Language Rights and Bilingual Education](#)

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- T. Wiley: [Policy Considerations for Promoting Heritage, Community, and Native American Languages](#). In Volume: Language Policy and Political Issues
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Bilingual Education in the United States

Patricia Gándara and Kathy Escamilla

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Abstract

The history of bilingual education in the United States has shifted between tolerance and repression depending on politics, the economy, and the size of the immigrant population. Languages other than English have been (and continue to be) primarily seen as a problem to be remediated by the schools. However, the massive increase in students whose primary language is not English (today more than one in five) and who perform at exceptionally low levels in the nation's schools has once again provoked discussion about the most effective way to educate them. Research has accumulated showing a clear advantage for “maintenance” dual language and bilingual programs over English-only or transitional programs with respect to achievement, attainment, and a number of other outcomes. Nonetheless, many challenges remain to implementing such programs on

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a large scale: the politics of bilingualism and the shortage of highly qualified teachers are among the primary obstacles. However, if federal and state education policies supported bilingualism as an important goal for all US students, and incentives were created to recruit and train bilingual teachers, the USA could rapidly join other developed nations that have long supported multilingualism and nurtured it in their students.

Keywords

Assets • Dual language • Maintenance bilingual • Politics • Teachers • Transitional bilingual

History of Bilingualism in the USA

Ironically, the United States, a self-proclaimed “nation of immigrants” has historically had an uncomfortable relationship with its immigrants and their languages. There have, however, been some exceptions at different times in the nation’s history. For example, during the eighteenth century many of the new settlers spoke French, Dutch, and German (Kloss 1977/1998) and the German language was so widely spoken in the new colonies that Benjamin Franklin was quoted in 1751 as bemoaning the possibility that Pennsylvania “in a few years [would] become a German colony” (Schmid 2001, p. 15). By 1800, German bilingual schools flourished throughout large swaths of the country, particularly in the Midwest. In 1839, Ohio became the first state to adopt a bilingual education law, authorizing German-English instruction at parents’ request. Louisiana enacted an identical provision for French and English in 1847, and the New Mexico Territory did so for Spanish and English in 1850. By the end of the nineteenth century, about a dozen states had passed similar laws (Kloss 1977/1998).

In 1870, the country was hit with a deep economic recession and any policy that seemed to favor immigrants was targeted. In defense of German language programs, the “straightforward economic argument was made that bilingual skills in English and German would prove a great boon to business and trade interests at home and abroad, particularly in light of Germany’s growing stature in international commerce (Schlossman 1983, p. 156),” but this argument could not forestall the coming repression of “foreign” languages. By the 1880s, more restrictive language policies were underway as new immigration of Southern and Eastern Europeans was beginning. The Naturalization Act of 1906 required that to become a US citizen, immigrants would have to be able to speak English. World War I finally brought a close to German language education in the United States (Wiley 1998).

The post-World War I period ushered in an era of overt repression of foreign languages and new efforts to “Americanize” immigrants. By 1923, 34 states had laws requiring English-only instruction in all private and public primary schools (Kloss 1977/1998). That same year, a Nebraska teacher who was fired for teaching German in a private elementary school took the case to court arguing that the 14th

amendment disallowed such discrimination against a language group. In an uncharacteristic decision for its time, the Supreme Court ruled in favor of the teacher's right to teach his subject and parents' right to choose their children's education in the case (*Meyer v Nebraska* 1923). However, this had little impact on the tenor of the times. The economic depression of the 1930s and the end of immigration to the country (Schmid 2001) stemmed the Americanization efforts and reduced the nation's obsession with rooting out "foreign" languages. Nonetheless, a significant pocket of Spanish speakers continued to live in the states along the US-Mexico border where the families were largely dedicated to farm labor and the children often came to school speaking no English. The primary response to this was to segregate them into "Mexican schools" or "Mexican rooms" where they were presumably taught English and "Americanized." The education Mexican children received in these settings was clearly inferior (US Commission on Civil Rights 1972). Bilingual instruction was not provided and the level of education was appallingly low, with few students going on even to high school (Carter 1970; US Commission on Civil Rights 1972).

The Cuban Revolution of 1959 and subsequent exodus of large numbers of Cubans to South Florida had an important impact on the way that bilingual instruction came to be viewed. Unlike the Mexicans of the Southwest in almost every way (e.g., wealth, status, education, and race) except language, the Cubans established bilingual schools where their children could learn in two languages while they waited to return to the Spanish-speaking island as soon as Castro was deposed. The Coral Way School, the first established to meet the needs of the Cuban children, became a model of bilingual education for the nation.

With the civil rights era of the 1960s came a new willingness to consider the plight of students who did not speak English, as well as a new understanding that making children feel ashamed of their language and culture was counterproductive to learning (Portes and Hao 2002). The 1968 Bilingual Education Act (Title VII of the historic Elementary and Secondary Education Act of 1965) acknowledged the particular needs of "Limited English Proficient" (LEP) students and provided a modest \$7.5 million for some pilot bilingual programs. However, the goal of these programs was not defined in the law and it was unclear – and highly controversial – whether their purpose was to teach children in two languages so that they might be literate in both or simply to transition them into English at the first moment possible (Crawford 2004). Nonetheless, the very fact that the legislation named the program "bilingual education" gave credibility to the idea of instruction in two languages. Following the lead of the federal government in supporting bilingual instruction, most states with significant "LEP" populations passed legislation to provide a variety of bilingual programs. Massachusetts was the first to pass a bilingual education law in 1971.

The next critical event for education policy for English learners occurred in 1974 with the Supreme Court ruling, *Lau v Nichols* in which 1,856 Chinese-speaking children in San Francisco argued that they were being denied an equal education because they could not understand the classroom instruction and no accommodations were made for their language difference. The Court ruled that the school district

had to take affirmative steps to provide access to the same curriculum that English-speaking students received; however, it did not instruct the schools about how this should happen. In Justice Douglas's opinion for the Court, he wrote:

No specific remedy is urged upon us. Teaching English to the students of Chinese ancestry who do not speak the language is one choice. Giving instructions to this group in Chinese is another. There may be others. Petitioners ask only that the Board of Education be directed to apply its expertise to the problem and rectify the situation [414 U.S. 563, 565].

Most Boards of Education assumed that some form of bilingual education was probably in order. By 1997, 11 states had laws supporting some form of bilingual instruction (Garcia and Morgan 1997). However, in 1998 California became the first to overturn its bilingual law and establish English-only instruction as the default. Even states with bilingual education laws allowed for English Learners (ELs) to be educated in alternative settings. For example, prior to the passage in California of the antibilingual initiative, only 29 % of EL students were actually in any kind of bilingual program (Gándara et al. 2010). The last study sponsored by the US Department of Education to assess the programs being offered to English learners found that no more than 39 % of these students were being provided instruction that incorporated, in some form, the use of their primary language (Zehler et al. 2003). This study was undertaken before Arizona and Massachusetts also officially abandoned bilingual education; other states have done so more quietly.

Days after the ruling in *Lau v Nichols*, in 1974, the Congress passed the Equal Educational Opportunities Act (EEOA), requiring school districts to “take appropriate action to overcome language barriers that impede equal participation by its students in its instructional programs.” “Appropriate action” was clarified by the 5th Circuit in (1981) *Castañeda v Pickard* decision, setting the “three prong standard” that included: (1) a program based on recognized theory; (2) faithfully implemented according to the theory, including adequate resources for implementation; and (3) that demonstrated effectiveness over time. In (2009), in *Horne v Flores*, the Supreme Court in a 5–4 decision, overturned a federal court's finding that Arizona did not meet the second prong, failing to provide requirement of sufficient funding to implement the program. In his written opinion, Justice Alito also noted that Arizona had implemented a “significantly more effective” form of instruction when it abandoned bilingual instruction in favor of Structured English Immersion.

The federal Bilingual Education Act (BEA) has also been the object of political whim and ideological campaigns. With the exception of 1994, each time the Bilingual Education Act has been reauthorized, the regulations regarding bilingual education have been weakened in favor of greater support for English-only instructional methods. With the realization of the Elementary and Secondary Education Act in 2001 (renamed the No Child Left Behind Act), the BEA (Title VII) disappeared entirely and was replaced with the “English Language Acquisition, Language Enhancement, and Academic Achievement Act.”

Thus the history of bilingual education in the United States has shifted between tolerance and repression depending on politics, the economy, and the size of the

immigrant population. Languages other than English have been (and continue to be) primarily seen as a problem to be remediated by the schools (Ruiz 1984). Language rights have been framed largely as the right to not be discriminated against, and bilingual educators have routinely been on the defensive about helping students to maintain their native language; in the minds of most Americans, bilingual education is for the purpose of teaching English and not about actually educating a student in two languages (Gándara and Contreras 2009).

Demographics of Bilingualism in the USA

Since 1980, the number of people 5 years and older that speak a language other than English at home in the USA has nearly tripled. Today more than 60 million people, or almost one-quarter of the total population, use another language at home. Nearly two-thirds of these individuals speak Spanish, with the next most common languages being Chinese, French, Tagalog, Vietnamese, and Korean; however, more than three-fourths of these individuals report that they also speak English “well” or “very well” (Ryan 2013). Thus “natural” bilingualism is now pervasive; one in five students in American public schools comes from a home in which English is not the primary language, and about 11 % of all students are designated as English learners (Batalova and McHugh 2010).

Defining Bilingual Education and Instructional Options

When defining bilingual education in the USA, it is important to understand that, unlike in much of the rest of the world, bilingual education in the United States has primarily been a program whose goal is to teach English rather than to develop bilingualism/biliteracy. The vast majority of USA bilingual programs are designed for students who come to school speaking native or home languages other than English and who are learning English as a second or additional language. Over the past 20 years, new forms of bilingual education, generally referred to as dual language, have also been developed and implemented in the USA. Dual language bilingual programs have the goal of developing bilingualism/biliteracy and cross-cultural competence and include in their student body students who are monolingual speakers of English as well as those who are learning English as an additional language. Bilingual programs whose goal is English acquisition are generally termed transitional bilingual programs and have been labeled “subtractive” in the literature, whereas dual language bilingual programs whose goal is the development of bilingualism and biliteracy have been labeled as “additive” (Baker 2011; Crawford 2004, de Jong 2011). These various forms of bilingual education will be defined and discussed below. It is important to note that there is great variability within transitional and dual language bilingual programs and some programs use the same label but implement widely different practices while other programs use different labels but employ similar practices.

The vast majority of bilingual education programs in the USA are labeled as transitional bilingual education (TBE) and TBE programs can serve any non-English language group; however, the majority of TBE programs serve Spanish-speaking students. Transitional bilingual programs are subdivided into early-exit and late-exit programs. TBE programs were developed as a way of responding to various local, state, and federal mandates that required schools in the USA to provide equal access to educational opportunities for students who enter US schools with limited proficiency in English. These programs are designed for students who are labeled as English Language Learners (ELLs) or students whose proficiency in English is so limited that they would not be able to benefit from schooling offered only in English (see *Lau v. Nichols*, 1974), and as their label suggests were designed to use students' native languages to help them transition to English.

With regard to language policy, TBE programs utilize two languages as media of instruction for all or part of the school day in order to enable ELLs to access the content of math, science, social studies, and reading and language arts while they are learning English. In addition to learning content in the non-English language, TBE programs include the study of English as a Second Language (ESL) in their curriculum. The underlying rationale for TBE programs is to utilize students' native languages to teach content so that these students do not fall behind in their learning of content while they are learning English. TBE programs are organized to gradually transition students from learning school content in a non-English language to learning school content all in English. Early exit programs strive to attain this transition in 1–3 school years, while late-exit programs favor a more gradual transition of 4–5 school years (Crawford 2004). In all cases, the ultimate goal is the acquisition of English.

TBE programs of all types have been widely criticized in the US for being subtractive and assimilationist. Subtractive in that they are not intended to develop bilingualism and biliteracy and frequently result in loss of students' native language, and assimilationist in that they do not foster the development of multicultural perspectives or cross-cultural competence. Despite this criticism, there is a plethora of research that indicates that the use of students' home languages in instruction, even for short periods of time as in TBE programs is beneficial (August and Shanahan 2006; Goldenberg 2013). The research base is particularly strong with regard to learning to read in students' native languages, and the consensus around numerous experimental studies conducted over the past 40 years is that learning to read in a non-English language boosts reading skills in English (Goldenberg 2013).

A second type of bilingual education program that is growing in popularity is labeled Dual Language Education. There are three major types of dual language programs: (1) Developmental or maintenance dual language, (2) Two-way immersion programs, and (3) Immersion programs in languages other than English. Unlike TBE programs, dual language programs have as their goal the development of bilingualism (the ability to speak fluently in two languages), biliteracy (the ability to read and write in two languages), academic achievement (equal to that of students in nondual language bilingual programs), and cross-cultural competence (García 2009; Genesee 2004). Their intent is to use two languages for content and literacy

instruction for a sustained period of time (at least 5 years) (Howard et al. 2003). Further, two-way dual language programs include students who are native monolingual English speakers as well as students for whom English is an additional language. These programs are considered to be additive in nature because they build on and extend students' existing language competencies and aim to broaden students' linguistic repertoires. In dual language bilingual programs, all students learn at least two languages and all students learn content area subjects in English as well as other languages. Like TBE programs, the vast majority of dual language bilingual programs in the USA are offered at the elementary school level and are Spanish/English programs. However, there are small but growing numbers of programs in middle and high schools and programs that involve languages other than Spanish (Center for Applied Linguistics 2014).

It is important to note that bilingual education programs in the USA of all types have largely been developed, debated, and researched around language of instruction issues. Languages of instruction debates have included which languages should be used as media of instruction, for whom, and how long. While important, debates around language of instruction have prevented the field from engaging in equally important debates about quality of instruction. For example, it is not just important that a TBE or dual language bilingual program teach children to read and write in English and Spanish for 1 h a day, it is equally important to insure that during this 1 h of instructional time, quality teaching methodologies are implemented. There is a dire need for research on the development of pedagogical practices that can enhance and improve instruction in all types of bilingual education programs (Slavin and Cheung 2005; Genesee et al. 2006; Goldenberg and Coleman 2010).

Research on Bilingual Education

Following a very short "honeymoon" after the passage of the Bilingual Education Act in 1968, bilingual education began to come under attack for being ineffective and a waste of money. In response to the controversy, the federal government commissioned its first evaluation of bilingual education from the American Institutes for Research in 1977–78 (Danoff 1978). This study compared students in 38 Title VII bilingual programs with similar students in ESL classrooms and found no impact of the bilingual programs on test scores. The study was roundly criticized for including programs in the two groups solely on the basis of program labels without examining the educational treatment provided. This, and other methodological problems, left the findings of the study in significant dispute. A second, large-scale comparative study was commissioned by the federal government. This one conducted by David Ramirez and his colleagues (1991) was much more complex and involved a 4-year comparison of English immersion, early-exit transitional bilingual, and late-exit transitional bilingual programs on various achievement outcomes in both English and Spanish. The researchers were careful to examine the instruction provided in each, and the amount of time dedicated to each language, as well as teacher characteristics and pedagogical strategies. Nonetheless, there were

very significant differences in the students assigned to each program type with late-exit students being much more low income and with a significantly lesser chance of having attended preschool. Also, programs could not usually be compared to others in the same district or school so that school and district effects were likely powerful contributors to uncontrolled differences among the groups (Meyer and Feinberg 1992). Moreover, very heavy attrition of students called into question many of the results. In sum, the researchers found a small positive difference in first grade reading outcomes for the early-exit bilingual model over the English immersion, but overall the study did not find significantly different outcomes for the three groups of students.

A number of meta-analyses of smaller studies have also been conducted. The first was a narrative review commissioned by the US Department of Education to determine if English-only programs were more effective with respect to English language outcomes than bilingual programs based on existing research. Keith Baker and Adriana de Kanter (1981) reviewed over 300 studies but found only 28 that met sufficient methodological rigor to be included in their qualitative analysis of the programs – “yes” the evaluation found positive effects for bilingual instruction, “no”, it did not. There was no attempt to quantify the degree of effectiveness. This very widely cited study found, “The case for the effectiveness of transitional bilingual education is so weak that exclusive reliance on this instructional method is clearly not justified (p. 1).” In other words, they did not find a definitively positive outcome for *either* of the two methods tested.

Diane August and her colleagues (2010) more recently reviewed a “best evidence synthesis” and four meta-analyses conducted of second language programs since the early 1980s, selecting only those that used rigorous meta-analytic methods, and that were conducted by researchers from varying disciplines and perspectives. In the best evidence study, Robert Slavin and Alan Cheung (2005) found that among the 17 studies that met their strict criteria for inclusion, 13 favored bilingual programs (all Spanish-English) and 4 found no differences. The effect size for the averaged score differences was between .33 and .45, indicating a “medium positive effect.” It has been pointed out that this is approximately the same effect size as for significant reduction in class size (Goldenberg 2008). Across both the best evidence study and the four meta-analyses, August et al. (2010, p. 143) found “differences in favor of native-language instruction, with effect sizes ranges from small to moderate.” The researchers also note that the better the technical quality of the studies, the larger were the effect sizes. In another synthesis of the research on reading instructional approaches for English learners, Goldenberg (2008, p. 14) also concludes that “Teaching students to read in their first language promotes higher levels of reading achievement in *English*,” a finding that is often thought to be counterintuitive.

Most evaluation research on bilingual education has focused narrowly on short-term outcomes for reading and math in *English*. Very little attention has been paid to longer-term effects or to other potential outcomes. In fact, many of the studies that have found no difference or less positive effects for bilingual instruction have been based on very short-term analyses. Genesee and his colleagues (2006) reporting on a synthesis of research on English learners note:

Evaluations conducted in the early years of a program (Grades K-3) typically reveal that students in bilingual education scored below grade level. . . [but] Almost all evaluations of students at the end of elementary school and in middle and high school show that the educational outcomes of bilingually educated students, especially those in late-exit and two-way programs, were at least comparable to and usually higher than their comparison peers. (p. 201)

A recent study that followed thousands of students in one large school district in transitional bilingual, dual language bilingual, and English-only programs beginning in kindergarten and following them into high school found that the students who had remained in bilingual instruction, and especially dual language bilingual programs, outperformed the students in English-only instruction on all measures –they ultimately reclassified to English proficient at higher rates, scored higher on English Language Arts and on measures of English proficiency (Umansky and Reardon 2014).

With respect to outcomes other than test scores or English proficiency, there is now a large and growing body of research on a host of outcomes. Bialystock (2001) has found that bilingually educated students have greater cognitive flexibility, working memory, and executive functioning (e.g., concentration); Portes and Hao (2002) have found that bilingual students have more cohesive family relations and fewer behavior problems in school; Santibañez and Zárate (2014) have found that students who maintain their bilingualism into high school are more likely to go to college and for Latinos, to 4 year colleges; and Rumbaut (2014) has found that these students who maintain bilingualism are less likely to drop out of high school and to secure higher level positions in the workforce. Agirdag (2014) has also found that these young bilinguals will earn significantly more in the labor market compared to their monolingual peers “with immigrant roots.” These findings call attention to the need to be more specific about the goals of instructional programs for English learners. If the goal is simply oral English proficiency, it may not matter greatly which program is provided; however, if educators are concerned about cognitive growth, reading ability, social adaptation, drop out, college-going, or eventual earnings, the research is all pointing in the direction of bilingual instruction and especially those programs that offer strong models of both languages.

Contemporary Dilemmas in Bilingual Education in the USA

There are a myriad of issues that challenge the full implementation of bilingual education programs in the USA. Since the early 2000s, federal policy has established definitively that bilingual education is for the purpose of teaching English and not about actually educating a student in two languages (Gándara and Contreras 2009). In addition, there are other contemporary dilemmas to full implementation of bilingual programs in the USA. These include: (1) changing demographics with regard to language minority populations; (2) the implementation of the new Common Core State Standards (CCSS) which are currently monolingual and

monocultural; (3) a concomitant new high stakes testing system to assess accountability to the CCSS and which currently exists only in English; and (4) a chronic teacher shortage, in part, caused by English-only educational policies of the past two decades. Each of these dilemmas is discussed below.

Currently, the majority of bilingual programs in the USA are designed for students who are labeled as “English Learners.” These models follow sequential models of bilingual development in that literacy and content knowledge is developed in the non-English language first as students learn English as a second language. This is the structure of the majority of TBE and many dual language bilingual programs. These models work well for students who enter school having had little or no exposure to English.

However, over the past 20 years, the profile of English learners has changed and program designs have not kept pace with the changes. In some areas of the USA, the majority of English learners are simultaneous bilinguals who were born in the USA and have been exposed to English since birth. They are children of immigrants, but are not immigrants themselves. The Urban Institute reports that 77 % of elementary aged English learners are born in the USA as are 56 % of secondary aged English learners (Capp et al. 2005). There are few, if any, bilingual programs designed for simultaneous emerging bilingual children although there is growing interest in this demographic (García 2009; Escamilla et al. 2014). They represent a “new normal” and new programs and policies need to be designed for them.

In addition to the changing profile of English learners, the USA has recently instituted two additional national policy initiatives that will likely not support the creation of new bilingual program models regardless of the population to be served. The initiatives are the Common Core State Standards (CCSS) and their accompanying assessment systems known as Partnership for Assessment of Readiness for College and Careers (PARCC) and the Smarter Balanced Assessment Consortium (SBAC). Developed in 2009, the goal of the CCSS is to provide a framework to better prepare students for life after high school whether in college or the work force. Forty-five states will begin implementation of the CCSS in the 2014–2015 school year with the hope that the implementation of the CCSS will improve the international ranking of the USA on assessments and that having national standards will insure that all states are teaching the same things in the same grades (Council of Chief State School Officers 2012). PARCC and SBAC assessments will be used to measure the extent to which individual states, districts, and students are meeting the new CCSS. As these new reforms are implemented, teachers will have little control over the curriculum they teach and the time they can allocate for instruction, thereby making the implementation of transitional bilingual and dual language bilingual programs more challenging (Berliner and Glass 2014).

These reforms are thought to be necessary to boost the USA’s international standing. Ironically, neither the CCSS standards nor the high stakes testing programs that are meant to assess their progress include standards about bilingualism, biliteracy, and cross-cultural competence. In fact, the standards and assessments are currently all in English. The research cited above affirms that bilingualism, biliteracy, and cross-cultural competence are highly desirable skills, especially for

the twenty-first century, and yet there is no inclusion of them in the new standards. Since bilingualism/biliteracy imply meeting standards in *two* languages, the new CCSS would actually appear to be lowering standards rather than raising them. Moreover, 11 states have already passed legislation authorizing the Seal of Biliteracy and legislation is pending in the Congress to make it nation-wide. The Seal of Biliteracy is awarded to students who can demonstrate full proficiency in two or more languages (reading, writing, listening, and speaking) upon high school graduation. In 2014, almost 25,000 students were able to earn this recognition in California alone.

It is axiomatic that programs of transitional bilingual and dual language bilingual education cannot be implemented without fully qualified teachers. Historically, one of the greatest obstacles to quality implementation of bilingual programs has been the availability of fully prepared teachers, and this dilemma continues. For school year 2009–2010, the Biennial Report on Title III (the federal government's office of English Language Acquisition), it was estimated that 47,185 additional English as a second language or bilingual certified teachers would be needed over the following 5 years to fill Title III teacher positions. These numbers are likely conservative estimates (US Department of Education 2013). Further, in 2009–2010 the American Association of Colleges of Teacher Education (AACTE) reported that only 1 % of bachelor's degrees nationally were awarded to teachers preparing to be bilingual and/or ESL teachers. Added to this is that fact that the potential teaching force of bilingual/biliterate teachers has been diminished due to state mandates over the past 15 years that in some cases have outlawed bilingual education outright or have emphasized the acquisition of English over the development of bilingualism/biliteracy. The future bilingual teaching force includes emerging bilingual students who are currently sitting in US classrooms and who because of current federal and state policies are lacking opportunities to develop their skills and knowledge in two languages.

Ongoing and unresolved debates about immigration, testing and assessment, and teacher evaluation also constitute significant issues that might impede the future of bilingual education in the USA. In short, despite growing interest in bilingual education among parents and local communities, there remain some formidable challenges to the creation and widespread implementation of bilingual education in the USA in the near future.

Conclusion

Virtually all of the recent growth in US public schools is attributable to the children of immigrants. These children bring enormous cultural and linguistic assets to the nation. Research suggests that building on these assets through bilingual instruction would be the most effective way to increase their academic achievement and social and psychological well being, but it would also strengthen both their own labor market prospects and the economy of the nation.

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Bilingual Education in Canada

Joseph Dicks and Fred Genesee

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Abstract

Bilingual education, for the purposes of this chapter, is defined as a program at elementary or secondary school where two (or more) languages are used as media for content instruction. In Canada, due to the success and popularity of French immersion, bilingual education programs tend to follow an immersion model, described in more detail later. In this chapter, we consider three main forms of immersion in Canada: (1) French immersion (FI), originally mainly for

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English-speaking majority students, but now also populated by learners from nonofficial minority language backgrounds (Taylor 2010) (2) heritage language (HL) programs for students with backgrounds in nonofficial languages such as Ukrainian, German, and Mandarin; and (3) indigenous language programs for aboriginal students (e.g., students of Inuit, Mohawk, or Cree backgrounds). Despite some differences, in general, each program type respects two fundamental principles: (1) additive bilingualism is the assumption that acquisition of a second language brings personal, social, cognitive, and economic advantage without negative effects on first language or academic development, and (2) learning a language when it is used as a medium of general curriculum instruction (e.g., in mathematics and science) in an intensive and extensive time period is effective. We begin by summarizing early developments in each program type and then describe the evolution of each along with trends in recent research. We conclude by proposing a number of issues that warrant further research.

Keywords

Bilingual education • Immersion • Indigenous languages • Heritage language • Official languages • Aboriginal education • Additive bilingualism • Minority language • Multiculturalism • Multilingualism • At risk learners • L1 use

Introduction

Bilingual education, for the purposes of this article, is defined as a program at elementary or secondary school where two (or more) languages are used as media for content instruction. In Canada, due to the success and popularity of French immersion, bilingual education programs tend to follow an immersion model, described in more detail later. In this chapter, we consider three main forms of immersion in Canada: (1) French immersion (FI), originally mainly for English-speaking majority students, but now also populated by learners from non-official minority language backgrounds (Taylor, 2010), (2) heritage language (HL) programs for students with backgrounds in non-official languages such as Ukrainian, German, and Mandarin, and (3) indigenous language programs for aboriginal students (e.g., students of Inuit, Mohawk or Cree backgrounds). Despite some differences, in general, each program type respects two fundamental principles: (1) additive bilingualism – the assumption that acquisition of a second language brings personal, social, cognitive and economic advantage without negative effects on first language or academic development, and (2) learning a language when it is used as a medium of general curriculum instruction (in mathematics and science, for example) in an intensive and extensive time period is effective. We begin by summarizing early developments in each program type and then describe the evolution of each along with trends in recent research. We conclude by proposing a number of issues that warrant further research.

Early Developments

French Immersion (FI)

Bilingual education in Canada is directly linked to historical developments related to Canada's official policies on bilingualism and multiculturalism. FI in Canada had its roots in the 1960s, a critical period in Canada's development toward official bilingualism in French and English. Events in Quebec during this period, referred to as the "révolution tranquille" (quiet revolution), sought to strengthen the role and status of the French language and culture in the province and indeed across Canada. In 1963, Prime Minister of Canada Lester B. Pearson established a royal commission to examine the existing state of bilingualism and biculturalism in Canada and to recommend steps to be taken to develop the country on the basis of an equal partnership between the French and the English. The report of the commission, published in 1965, made the following recommendations, among others:

- English and French be declared official languages of Canada
- Parents be able to have their children attend schools in each official language in regions where there is sufficient demand

The second provision was particularly important for francophones in English-dominant regions, for example, French-speaking children in British Columbia, since it enhanced the chances of preserving French in those regions. This recommendation eventually became law and was enshrined in Canada's Charter of Rights and Freedoms in 1982 ensuring francophones across the country the right to enrol their children in French-medium schools and, similarly, anglophones' access to English language education in French-dominant regions.

As the French language became increasingly important in Quebec, parents of anglophone children recognized that existing French second language instruction was not adequate to provide their children with the level of bilingualism they needed to participate fully and meaningfully in the province. Consequently, a group of anglophone parents in St. Lambert, near Montreal, consulted with researchers Wallace Lambert, Richard Tucker, and Wilder Penfield at McGill University to find more effective ways to teach French in English language schools. These meetings led, in 1965, to an initiative now known as the St. Lambert experiment and the founding of the first FI program (Lambert and Tucker 1972).

In FI programs in Canada, at least 50 % of academic instruction is delivered through French during one or more grades of elementary and/or secondary school for majority language English-speaking students (see Johnson and Swain 1997, for a broader definition). Students are expected to inductively learn French from teacher talk and the written texts they read as part of general instruction. Formal, direct instruction in the second language (L2) is provided during daily language arts periods. As well, content teachers may provide language instruction during the course of teaching academic subjects when they observe that students are struggling with the L2 or making errors. However, there is considerable variability among

content teachers in how much language instruction they provide and how such instruction is actually delivered. Questions have been raised about whether the current focus on content is the optimal approach for fostering L2 competence, a point we return to later.

Alternative forms of FI exist that vary with respect to the grade in which the use of the L2 for academic instruction begins and how much academic instruction through the L2 is provided. In early total FI, all or nearly all subjects in Kindergarten to Grade 2 are taught in French; the use of French gradually decreases until about 50 % of instruction is provided in French and 50 % in English by the end of middle school. In early partial FI, about 50 % of instruction in each year of elementary school is provided in each language. In middle or delayed immersion, the use of the L2 for academic instruction is delayed until Grade 3 or 4, and in late FI, the L2 is not used for academic instruction until Grade 6 or later (see Genesee 2004, for more details). Students in delayed and late FI receive traditional French second language instruction in the grades preceding the use of the L2 for academic instruction.

The goals of FI programs are to provide students with functional competence in written and oral French while not detracting in any way from their academic achievement or first language (L1) proficiency. Similarly, while an understanding and appreciation of French culture was viewed as an important goal, it was equally important that students' own cultural heritage and identity be maintained and valued. As a result of research undertaken by Lambert and Tucker (1972) that demonstrated the success of the St. Lambert experiment, FI programs expanded exponentially throughout Quebec in the 1970s and 1980s and, in fact, are now a popular option for students across English-speaking Canada. Currently, FI enrolment in Canada ranges from a high of 36 % of non-francophone students in Quebec, 26 % in the officially bilingual province of New Brunswick 23% in Prince Edward Island, but just 6.6 to 14.4 % in other provinces (CPF, 2014)). Enrolment in FI has also expanded considerably to include students of nonofficial language backgrounds, particularly in larger urban centers (Dagenais and Berron 2001). FI has been criticized, nonetheless, for being elitist even in New Brunswick where the enrolment is high (Cooke 2009). These criticisms have been countered by those who argue that FI has not received the same support with respect to resource teachers and teacher assistants for students who experience difficulty (Bourgoin 2014; Cooke 2009).

Heritage Language (HL) Programs

In 1985, the government of Canada passed into law the Canadian Multiculturalism Act, the broad aim of which is to preserve and enhance multiculturalism in Canada. With respect to language, the Act states that it is the policy of the Government of Canada to "preserve and enhance the use of languages other than English and French, while strengthening the status and use of the official languages of Canada" (Government of Canada 1985). The term heritage language (HL) is used in Canada to refer to languages other than the official languages (English and French) or indigenous languages. Around the same time, scientific evidence along with

theoretical arguments laid the foundation for schools and families to consider ways in which HL speakers could maintain and develop their languages while they acquired the dominant societal language. In brief, arguments were made, with some empirical support, that promotion of HLs had a number of benefits: (1) it would strengthen students' sense of identity and confidence; (2) the acquisition of strong HL skills would support the acquisition of the societal language, especially in domains related to schooling, through positive transfer; (3) bilingualism would promote cognitive advantages; and (4) bi- and multilingual competence would be an asset for future graduates in the job market and for their communities since it would give them a competitive edge in an increasingly globalized world (Cummins and Danesi 1990).

Ontario and Quebec have historically had large immigrant populations and, as a result, have offered a range of HL programs in a variety of languages, including Italian, Portuguese, Greek, and Spanish. Since the 1980s, HL programs have been established in other provinces (Duff 2008) and especially Alberta, which has programs in Arabic, German, Hebrew, Mandarin, Polish, Spanish, and Ukrainian (Cummins 2014a).

Indigenous Language Programs

According to Government of Canada statistics (2011), only 17.2 % of those having an indigenous identity reported being able to conduct a conversation in an indigenous language. As a result, there is the lack of linguistically qualified teachers to teach in indigenous immersion programs (Richards and Burnaby 2008).

Only the Northwest Territories and Nunavut officially recognize indigenous languages. The Kahnawake Mohawk program was among the first indigenous language immersion programs in Canada, and, according to Jacobs and Cross (2001), results were as promising as those of FI. Since 1971, immersion education has also been offered in Inuktitut, the language of the Inuit, an indigenous people living in northern Canada (Berger 2006). Cree, Iroquois, Ojibwe, Mi'kmaq, and Maliseet immersion programs have been slower to take root but are expanding. In addition to the goals of other forms of immersion, indigenous language bilingual programs seek to ensure the survival of the language and culture of the groups that participate in these programs (Dunbar 2008).

Major Research Contributions

Extensive research has been conducted on FI programs in Canada since its inception in 1965. In contrast, there has been relatively little published research on immersion in HL or indigenous language contexts. This section begins with a summary of major contributions from research on FI with an emphasis on research conducted in the past 10 years. It continues with a review of research on HL and then indigenous immersion programs.

French Immersion

The first two decades of FI in Canada (1965–1985) were a period of phenomenal growth, driven to a large extent by research findings on the effectiveness of these programs. Three major questions spurred this early research:

1. What level of proficiency do students attain in French, their L2?
2. Are there negative effects on proficiency in the first language (L1), English?
3. Do immersion students achieve to the same extent as non-immersion students in content areas taught in French (e.g., mathematics, science)?

There was a fourth question, equally as important but less frequently studied: How well do students who are at risk for academic difficulty succeed in FI?

Two decades of research on these questions have provided consistent findings that:

1. FI students can achieve a level of functional proficiency in French that surpasses that of students in more conventional L2 programs in which French is taught as a separate subject for short periods of time on a daily or periodic basis. Generally speaking, receptive skills (listening and reading) approach those of native French-speaking students, whereas production skills (speaking and writing) are less well developed, albeit highly functional (see Genesee 2004, for more details).
2. There are no negative, long-term effects on students' English language proficiency. However, students in early total FI may exhibit initial lags in spelling, reading, and writing in English; but these are temporary and, eventually, immersion students usually perform better than non-immersion students in these areas.
3. FI students usually achieve to the same level or higher than their peers in non-immersion programs in content area learning.

Research has also shown that FI is effective even for students with learner and background characteristics that might put them at risk for academic difficulty, including students with poorly developed L1 skills, disadvantaged socioeconomic and minority cultural backgrounds, as well as students with below-average academic ability (Genesee 2007).

More recently, researchers have turned their attention to more specific issues, including predictors of success and risk, multicultural learners, pedagogical issues related to explicit language teaching, and the use of the L1 as a cognitive and linguistic pedagogical tool (see also Kristmanson and Dicks 2014). While early research on at-risk learners has demonstrated the suitability for such students, recent research has focused on the identification of predictors of success or, alternatively, risk. Since its inception, some have criticized FI for being elitist. This has resulted in heated public debates in some communities, resulting in one Canadian province, for example, eliminating early FI programs altogether in order to "level the playing field" (Cooke 2009). However, recent studies have reinforced earlier findings and

challenge the notion that early FI is suitable only for academically strong students (Bourgoin and Dicks 2013; Genesee 2007; Kruk and Reynolds 2011). At the same time, some studies have sought ways to identify and use early predictors of difficulty in order to better understand the challenges faced by some students and, in turn, to better support students deemed “at risk” (Bourgoin 2014; Erdos et al. 2014).

Another evolving line of inquiry relates to instruction that includes a focus on the formal grammatical properties of the language and corrective feedback (Lyster 2007). While the success of French immersion has been attributed in large part to its emphasis on learning the L2 for purposes of communication about academic content (focus on function), there have been criticisms of FI for its lack of attention to accurate use of the L2 (e.g., Lyster 2007).

In response to these concerns, Swain (1995) posited the “pushed output hypothesis” whereby learners would be directed to pay attention to language form when engaged in oral production, and this would in turn, it was argued, enhance their use of grammatically correct forms. More recently, researchers have argued that immersion students’ grammatical accuracy can be enhanced through explicit and systematic focus on correct grammatical usage, without compromising their communicative competence. Indeed, there is evidence that inclusion of explicit focus on form and certain types of corrective feedback can improve students’ grammatical accuracy and overall communicative ability (Le Bouthillier and Dicks 2013; Lyster 2007; Lyster and Ranta 1997; Swain 1995).

Yet another focus of recent interest concerns the use of students’ L1 as a cognitive and linguistic tool for promoting L2 and academic development. Historically, the use of French and English in French immersion programs has been strictly separated so that French is used only during designated French times and, likewise, English only during designated English times. Researchers and educators have begun to question the validity of this approach on the grounds that language learning can be facilitated if connections between the languages are exploited in the classroom. This is a controversial topic because of the general belief on the part of many that English will become the dominant language if a “French-only” policy is not enforced. Contrary to these fears, Turnbull, Cormier, and Bourque (2011) report evidence that increased use of immersion students’ L1 when dealing with complex content in late French immersion science classes is positively associated with gains in both French ability and content knowledge. Swain and Lapkin (2013) similarly conclude that students’ use of the L1 as a tool to mediate their understanding of complex content can support their development of the target language, although the authors note that as student proficiency increases, they should be encouraged to use the L2 as a mediating tool (see also Culligan 2010).

Finally, with the growth of students who speak neither English nor French in FI, researchers have begun to examine pedagogical practices that can best respond to these learners (Cummins 2014b). Swain and Lapkin (2005) emphasize the importance of valuing students’ first language and implementing pedagogical modifications similar to those promoted by Cummins that allow learners, teachers, and others to build upon L1 linguistic and cultural knowledge to enhance L2 learning.

Heritage Language (HL) Programs

HL immersion programs have been offered in a variety of languages in a number of cities across Canada since the 1970s, as noted earlier. Evaluations of a number of these early programs were undertaken – in particular, programs in English-Ukrainian, English-Hebrew-French, English-Italian, English-Punjabi, and English-Portuguese (see Cummins and Danesi 1990, for synopses of these evaluations). These studies vary considerably with respect to the student outcomes they assessed, sample sizes, inclusion of matched control groups, and other factors. Nevertheless, taken together, the results from these evaluations were that the use of an HL along with English for regular academic instruction did not have deleterious effects on the students' English language or general academic achievement. While some studies reported results for HL proficiency, this evidence is difficult to interpret since in most cases, comparison groups or norms were not reported, likely owing to the lack of suitable comparison groups and norms.

More recently, Cummins and Chen-Bumgardner (2011) conducted a small-scale evaluation of an Arabic-English program in which each language was used for approximately 50 % of instruction in Kindergarten to the end of Grade 2. The evaluation itself focused on children in Kindergarten to Grade 2. Their results revealed that the English language skills of students in the program, including concepts about print, vocabulary, and word reading, among others, were on par with those of similar Arabic-speaking students in an English-only program. At the same time, the immersion students were superior in Arabic to those of the non-immersion students on measures of concepts about print, vocabulary, word decoding, and motivation to read. In fact, the Arabic language skills of the non-immersion students declined from junior Kindergarten to the end of Grade 2. They also reported significant positive correlations between Arabic and English on a number of measures.

Clearly, more research is called for on contemporary HL programs. In particular, while the success of these programs in promoting appropriate levels of English language and academic achievement is reasonably well established, more detailed examination of students' levels of achievement in the HL would be desirable in order to assess the overall success of these programs.

Indigenous Language Programs

Although quite scarce, evaluations of a number of such programs have been carried out. More specifically, Taylor and Wright (2003) conducted a 10-year, multi-cohort study of an early total Inuktitut immersion program for Inuit children in Nunavut, Canada; the children spoke Inuktitut as a first language. All instruction in Kindergarten to Grade 2 was in Inuktitut, the grades included in the evaluation. The evaluation included tests of general intellectual ability and of general, conversational, and academic language proficiency in each language (Inuktitut and English or French). Taylor and Wright report that while students in the immersion and

non-immersion programs scored equally well on the test of conversational language in Inuktitut at the end of Grade 2, the immersion students were superior on the test of academic language proficiency in Inuktitut. The immersion students also made steady progress in English over the 3 years of the evaluation, despite the lack of instruction in English, presumably due to the presence of English in the community. Taylor and Wright also report that the self-esteem of the Kindergarten immersion students increased from the beginning to the end of the school year, while the self-esteem of students in the non-immersion program was unchanged over the year. The researchers describe the difficulty of creating an additive bilingual situation in school in a context where the survival of the indigenous language and culture is in jeopardy but, at the same time, fluency in English and/or French is an advantage. The authors concluded that using Inuktitut as a language of instruction enhanced its importance in the minds of the indigenous students and their teachers so much that participation in the program increased significantly from year to year.

Genesee, Holobow, and Lambert (1987) evaluated the academic achievement and English language proficiency of students in an early total Mohawk immersion program outside Montreal; the program was 100 % Mohawk in Kindergarten to Grade 3 and approximately 50 % thereafter. The students were native speakers of English living in a Mohawk community (“reserve”). Standardized achievement tests were administered to immersion and non-immersion students from the same community who were matched by grade level, nonverbal reasoning skills, and oral language functioning. Their results indicated that there were no significant differences in the English and mathematics achievement of the immersion students in comparison to students in non-immersion classes. There were some predictable delays in the reading and writing skills of students in immersion classes during those grades when they had not received any formal English reading and writing instruction. These differences disappeared once formal English language arts instruction was provided. Independent evaluations of the immersion students’ Mohawk language skills revealed that Grade 4 students had achieved a level of oral proficiency that allowed them to meet their needs in the classroom.

Tompkins and Orr (2011) evaluated Mi’kmaq and Maliseet immersion programs in Atlantic Canada. They found that Mi’kmaq immersion students’ English reading scores were higher overall than those of their non-immersion peers. There was no evaluation of students’ academic outcomes, but researchers report that interviews with graduates of both programs revealed “high self esteem, intellectual curiosity, strong work ethic, and awareness and pride in ancestral language and culture” (p. 14). The authors also report that elders and others who were interviewed spoke about the importance of the program for maintaining and developing identity and culture. Sarkar and Metallic (2009) conducted a study of Mi’kmaq immersion program in Listuguj, Quebec, focusing on teaching language using a structural/visual approach that is congruent with Mi’kmaq culture rather than approaches used to teach English or French as a second language. The authors write that “Many people who have attended these classes report that they have made rapid progress in basic comprehension and speaking, after trying and failing in classes that used other approaches” (p. 56).

Outstanding Issues and Future Research Directions

As we have seen in the previous sections, immersion education and research on immersion education in Canada have evolved considerably since its inception. Nevertheless, there are important outstanding issues that warrant further investigation:

1. **Secondary French immersion.** Student participation in French immersion at the secondary level is noticeably lower than in earlier grades. This may be attributed to a waning interest among students for learning in French, along with their desire to follow friends in English programs. However, it is also difficult for many school districts to recruit teachers who are well versed in immersion pedagogy and who possess the linguistic skills needed to teach complex subject matter in French. This leads in some cases to a limited number of course options in French. Finally, many students are concerned about grades upon graduation and admission to university. This is exacerbated by the fact that there are few anglophone universities that offer courses designed for French immersion students. The full benefits of French require long-term participation; attrition contributes to lower levels of proficiency at graduation than could otherwise be achieved. More studies are needed that examine:
 - (a) Attrition rates carefully and explore the range of reasons for students' decisions to abandon French immersion at the secondary level.
 - (b) The availability, design, and delivery of courses in French at the postsecondary level.
 - (c) French immersion teacher education particularly the critical, interconnected role of language and content.
2. **Entry point and initial literacy development in L1 and L2.** As noted by Bourgoin (2014), questions concerning elitism and whether students would be better served by developing initial literacy skills in their L1 and about starting immersion later rather than in primary school have resulted in the elimination of early-entry FI in one province and calls for its curtailment elsewhere in Canada. Longitudinal research is needed that:
 - (a) Examines the classroom composition of FI programs in comparison to non-immersion classes and seeks to determine reasons for any differences and ways to rectify such differences through dissemination of knowledge and public education about immersion or other strategies.
 - (b) Compares carefully matched groups of learners starting in early-entry (K or Grade 1) and delayed-entry (Grade 3 or 4) programs in order to determine if initial development of literacy skills in either the L1 or the L2 is more beneficial for language and/or content learning.
 - (c) Examines how best to structure delivery of content in the L2 for adolescent learners in late-entry programs (Grade 6 or 7) who are beginning to learn complex academic content in their L2.
3. **At-risk learners.** There is a pressing need for more research concerning at-risk learners and, in particular, how best to predict and support learners at risk for

learning in immersion. Genesee and Fortune (2014) identify a number of specific recommendations for research in this area, including research on:

- (a) The relative effectiveness of alternative forms of immersion for students who have, or are at risk for, language or reading impairment since these are the two largest at-risk groups.
 - (b) The long-term effectiveness of pedagogical adaptations and interventions for immersion students with or at risk for reading, language, or other learning disabilities.
 - (c) Students with learning challenges that, to date, have had no or very little research attention – especially children with attention deficit (hyperactivity) disorder and autism spectrum disorder (Le Bouthillier 2013).
 - (d) Nonacademic outcomes, such as attitudes, long-term educational aspirations, and job-related outcomes after leaving school, in order to have a more complete picture of the consequences of participation in bilingual education for such learners.
4. **The role of the L1.** Important questions have arisen about how immersion students' knowledge of and competency in their L1 and culture can be used to enhance their academic and language development. In this regard, research of the following sort would be useful:
- (a) Comparative studies of carefully matched classes of learners and trained teachers to determine what effect L1 use has on L2 development and content area knowledge and what forms of L1 use are most effective.
 - (b) As a follow-up to (a), studies that seek to determine how much L1 use is "optimal" and at what point use of the L1 becomes a hindrance to L2 development.
 - (c) Studies that look at the role of L1 in the case of English-L1 students and those with other language backgrounds.
 - (d) Research that examines whether L1 use is more useful in certain subject areas or certain kinds of tasks than others and whether there are certain situations where L1 use is not an effective practice.
5. **Multilingual learners.** Related to recommendation #4, there is a need for more research on multilingual learners that addresses the following issues:
- (a) The effectiveness of FI for the growing population of learners for whom French is a third language, specifically research on the effect of FI on their academic achievement as well as their proficiency in their first language and English
 - (b) Whether and in what ways differences or similarities among languages (e.g., an alphabetic script in English and German or logographic script in Chinese) can cause greater or lesser challenges for learners
 - (c) Pedagogical adaptations that are sensitive to cultural backgrounds
 - (d) Whether the L1 or the L2, as in the case of many indigenous languages, contains strong oral traditions and the potential effect this may have on the development of literacy in the L3
6. **Indigenous language and culture.** The situation of indigenous languages in Canada is perilous. More research of all types on immersion programs intended to ensure the survival of indigenous languages is needed, specifically on:

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- (a) Pedagogical approaches and program structures that are particularly effective in promoting indigenous languages and cultures while ensuring academic success and mastery of the societally dominant language(s). There are three related questions that emerge:
- (i) Is it preferable to begin immersion schooling using an oral focus, in contrast to Western education, which focuses on oral and written language.
 - (ii) Is an exclusive focus on the indigenous language preferable and, if so, for how long in contrast to programs that introduce the nonindigenous language at the beginning or early on.
 - (iii) What proportion of the indigenous language and the other language are most effective for elementary-grade students with respect to both language and academic development.
- (b) The levels and kinds of proficiency that students in indigenous language immersion programs achieve in the indigenous language.
- (c) Whether indigenous language immersion programs lead to extended use of the language outside school and, if so, under what conditions.
- (d) The forms of professional development needed to ensure the availability of qualified teachers to work in such programs.
- (e) More specifically, scholarship in indigenous immersion education. Only 8 % of indigenous Canadians have a university degree compared to 23 % of the Canadian population at large. Having more indigenous Canadian scholars involved in research in indigenous communities would be a positive step forward in designing and implementing research in these areas.

Conclusion

Immersion bilingual education in Canada has a long history and continues to evolve. In particular, immersion is adapting to accommodate new kinds of learners as the country's multilingual, multicultural population grows. Immersion appears to be effective in promoting development in a wide range of languages with different roles in the community and for a variety of learners. At the same time, there are outstanding issues that need exploration. Additional funding of academic scholarship and research is required in order to explore topics such as effects of English/French learning on culture and identity, the relative balance of L1 and L2 instruction needed to maximize additive bilingualism, and the effectiveness of alternative language teaching approaches for indigenous students. Notwithstanding these outstanding needs, immersion programs are a popular and generally successful option in public education that serve a variety of educational and community goals and an ever-expanding variety of students and communities in Canada.

Cross-References

- [Indigenous Bilingual and Revitalization-Immersion Education in Canada and the USA](#)

- ▶ [Language Rights and Bilingual Education](#)
- ▶ [Teaching for Transfer in Multilingual School Contexts](#)

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Part VI

Bilingual Education in Europe

Bilingual Education in Europe: Dominant Languages

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Abstract

Today, bilingual education (BE) in dominant languages is available in most European public education systems. Implemented in a variety of sociolinguistic contexts marked by different educational history, and strongly supported by European institutions, BE varies from models where all school subjects are taught

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through two languages to more partial models where the target language is used to teach only one or two subjects. The CLIL (content and language integrated learning) model is considered as a central instrument to achieve the European Union (EU) policy aims of plurilingualism. Yet on the pedagogical level, CLIL remains a weak form of BE when its main aim is to improve foreign language teaching (as is illustrated by France), as compared to contexts like Malta or the Aosta Valley where nearly the whole school system is bilingual. The Aosta Valley more specifically is a good example of how BE can benefit from clearer conceptualization of bilingualism and the bilingual subject and prevent the elitism inherent in programs based on a monoglossic ideology of strict language separation. Despite the popularity of the CLIL model in Europe several problems remain: the lack of an agreed definition of CLIL, the hegemony of the English language in CLIL programs, evaluation procedures not taking into account the specificity of the bilingual individual, and the need to rethink bilingual teacher education. Finally, beyond the ideological choices in Europe and on the other side of the Atlantic to differentiate BE models, researchers could benefit from a less divisive approach to content-based language instruction.

Keywords

Bilingual education • Dominant languages • Content and language integrated learning (CLIL) • Content based language instruction • Dual immersion program • Plurilingualism • Council of Europe

Introduction

Bilingual education (BE) in Europe with regards to dominant languages has been conceptualized differently from BE in regional minority languages where in most cases the goal was language maintenance. This chapter will deal with BE in majority languages which are usually referred to as “foreign” languages, such as English, French, Spanish, Italian, or Swedish or any language with official recognition in European countries. According to Baker’s (2006) typology, BE in dominant languages in Europe can be considered as a strong form of education because two “majority” languages are involved, where pluralism and enrichment are the societal and educational aims and bilingualism and biliteracy are the aims in language outcome.

BE in dominant languages in Europe can also be described as an “additive” form of bilingualism (Lambert 1980) implemented in school contexts where a second language is added to the learner’s repertoire and the languages concerned are prestigious and powerful ones which will not displace the first language(s) and culture(s). In additive forms of BE, students gain not only linguistic and cultural benefits but also enrich their social capital. De Mejía (2002) used the term “elite” BE to describe models where majority children are taught through the medium of two prestige languages.

A distinction should be pointed out between full bilingual education provision, where two languages are used across all school subjects, and programs known in Europe as CLIL (content and language integrated learning) (Marsh et al. 2001) or EMILE in French (*enseignement d'une matière par l'intégration d'une langue étrangère*). In CLIL programs, the target language is used only across a limited number of school subjects (usually only one or two); therefore, in terms of objectives, acquisition of knowledge taught through the target language and time, CLIL is less ambitious than full bilingual education. Yet, the CLIL model has become the most common model of BE in Europe and has been integrated into public education systems throughout Europe with varying denominations and interpretations (Cenoz et al. 2014) due to different educational histories. The aim of CLIL models is mainly to develop more efficient approaches to the teaching of FL through increased exposure to the target language and increased practice through the integration of language and core content knowledge.

The two contexts analyzed below, France and the Aosta Valley, will illustrate how different ideologies and policies of bilingual education relate to the choice of a full bilingual model or to CLIL, as well as the outcome in terms of bilingual pedagogy. The comparison will bring to the fore the point made by García (2009) and García and Li Wei (2014) on the need to reconceptualize BE in the twenty-first century to reflect in classrooms the dynamic cycle of multiple language practices and communicative acts. Depending on whether language policies are heteroglossic or monoglossic, BE models will allow for different language practices where the two languages in contact can be used according to students' communicative needs or kept strictly apart.

Early Developments

The development of BE in dominant languages in Europe is directly linked to a series of EU policy papers published since the early 1990s. Two European institutions share responsibility for defining language education policies in Europe: the European Commission of the EU (28 member states, based in Brussels) and the Council of Europe (47 member states) with two structures, the Language Policy Unit based in Strasbourg and the European Centre for Modern Languages based in Graz. Although both assign general common objectives to European societies, such as preserving and promoting linguistic and cultural diversity, their objectives differ because of their primary orientations. Even if initially the European Commission promoted language learning to improve mobility and integration within Europe, it is today mainly an economic entity that encourages the learning of two¹ foreign

¹Beyond the acquisition of the “mother tongue.” Through a recent declaration (European Council, 2014, note 13), the term “mother tongue” has been replaced by the expression “main language(s) of instruction” while the most widely taught additional language(s) is referred to as second language. However, only official EU languages can be considered as “second languages.”

languages (FLs) for economic development. The Council of Europe's objectives refer to the protection of human rights which include plurilingual and intercultural education, the right to speak one's first language, the right to lifelong learning of additional languages, and the right to quality education in the language of instruction.

A terminological distinction must be explained: for the Council of Europe, multilingualism is a societal phenomenon whereas plurilingualism is an individual characteristic and both multilingualism and plurilingualism are central features of a European identity based on democratic citizenship. Multilingualism is the only term used by the EU and it includes both perspectives.

As early as 1995, the European Commission published a white book² declaring that trilingualism should be the official objective of European education systems. It was reformulated at a 2002 Barcelona conference³ under the 1+2 directive, meaning all European citizens should be encouraged to learn two additional languages on top of their "mother tongue" during their obligatory schooling. Then in Lisbon in 2000, a new policy on the "Knowledge Economy"⁴ by the European Council⁵ stressed the importance of teacher education, early foreign language learning, and CLIL approaches. In 2012, the European Commission published a document entitled "Rethinking Education Strategy"⁶ which stated that CLIL was available in almost all EU member states and decided to fund a 3-year project called E-CLIL⁷ to develop materials and a virtual resource center for the use of CLIL. Within this context, the various institutions of the European Union consider that the CLIL model of bilingual education is a central instrument to achieve its policy aims – that European citizens become plurilingual speakers and that language teaching start as early as possible. The European Centre for Modern Languages in Graz has also supported several CLIL programs among others the European Framework for CLIL Teacher Education which provides a set of principles and ideas for designing curricula for CLIL professional teacher development.⁸

BE in Europe has been conceptualized as only one dimension of a more general project on plurilingual education. The Council of Europe's projects on plurilingual and intercultural education consider that the central feature of language teaching is

²White Paper on Education and Training. Teaching and Learning. Towards the learning Society. http://europa.eu/documents/comm/white_papers/pdf/com95_590_en.pdf

³Conclusions of the presidency of the Barcelona European Council, 15–16 March 2002.

⁴http://consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/ec/00100-r1.en0.htm

⁵The European Council (<http://www.european-council.europa.eu/home-page?lang=en>) is an official institution of the EU not to be confused with the Council of Europe nor the Council for the EU also known as Council of Ministers. It defines the general political direction and priorities of the EU. With the entry into force of the Treaty of Lisbon on 1 December 2009, it became a EU institution. Its actual president is Donald Tusk.

⁶http://europa.eu/rapid/press-release_IP-12-1233_en.htm

⁷<http://e-clil.uws.ac.uk/>

⁸<http://clil-cd.euml.at/EuropeanFrameworkforCLILTeacherEducation/tabid/2254/language/en-GB/Default.aspx>

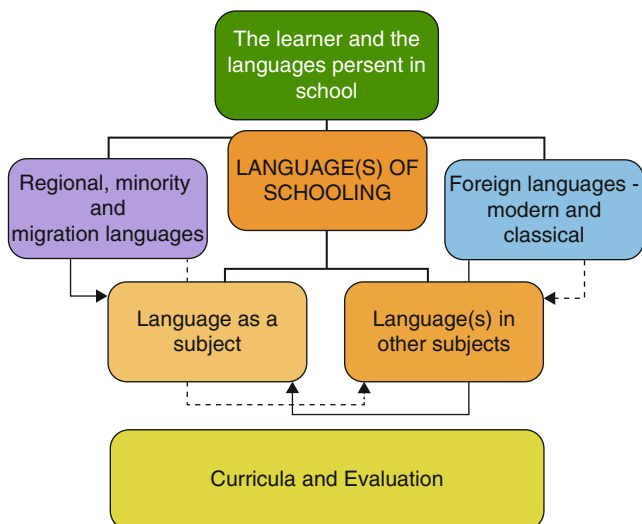


Fig. 1 Platform of resources and references for plurilingual and intercultural education (www.coe.int/lang)

the learner and her plurilingual repertoire of linguistic and cultural resources (family languages, heritage languages, foreign languages, etc.), represented by the following model (Fig. 1):

The model is based on the notion of repertoire, which allows for the recognition of the primary identity of the learner as a basis for further language learning, including first of all the language of schooling. Competence in the language of schooling is considered a priority for academic achievement and learners' future professional development. The language of schooling includes two dimensions: the language as subject⁹ (with its own components – literacy, literature, language awareness) and the language of other school subjects as the main means of acquisition of content knowledge. This second dimension (Beacco et al. 2010) is particularly relevant to our discussion here since bi-plurilingual education implies the acquisition of content knowledge through two different languages.¹⁰ Somewhat paradoxically, the specific language of other school subjects as a didactic issue and as a learning resource remains far more present in bilingual learning situations than in monolingual ones, where it is often invisible or considered as naturally acquired.

As well as BE, schools in Europe have always offered the teaching of FLs and this was the first preoccupation of the Council of Europe after the Second World War.

⁹This language can have different status: regional or minority or migrant, if these languages are part of the curriculum. In the case of foreign languages, for example, languages are considered first and foremost as school subjects.

¹⁰In this case, the languages can also have different status, but whatever their status, all languages are used as medium of learning alongside one another.

Through the teaching of FLs, communication between people and ultimately peace were envisaged as the main priority. Moreover, both the European Commission and the Council of Europe have led the efforts for a holistic global approach to language education, with links and convergences between languages and other subjects. This is perhaps the specificity of European language education policies as compared to other educational contexts.

Major Contributions

Within the general context of European language education policies, we will first consider bi-plurilingual contexts where the official language of another state is used to teach school subjects alongside the first language of schooling (usually official). However, European languages can have a different status in various contexts. These very frequent situations in Europe can be explained by various sociopolitical, socioeconomic, and sociolinguistic factors. Thus, we would like to propose a typology of contexts in which European BE in dominant languages operates: border contexts, colonial contexts, immigration contexts, and contexts with a long tradition of foreign language teaching which have implemented extensive teaching of subject contents in two or more languages and contexts with CLIL programs.¹¹ The models developed within these contexts are the result of language education policies that have been strongly influenced by contextual factors. One shared dimension in all these contexts is the predominance of English as the chosen, expected, or imposed language.

Border Contexts

These are defined by situations where for historical reasons borders have moved, sometimes on more than one occasion. Thus, political borders sometimes considered as natural do not constitute language borders but on the contrary create spaces of language contact. Even physical borders such as mountains have become over time transitional spaces open to language crossing. It is common in these contexts to hear people speak a local variety that belongs to the same linguistic family as a neighboring European language whose standard variety ends up being adopted. This is the case in Luxembourg (situated between France, Belgium, and Germany) where Luxembourgish – a Germanic language – is the national language alongside German and French, the two administrative languages (Weber 2009, 2014). These three languages are used in different proportions across the curriculum. Luxembourgish is the sole language of instruction in kindergarten (3–5 years old), then at primary school (age 6) it is replaced by standard German for literacy acquisition, and a year

¹¹We do not have enough space here to also address BE in multilingual states like Switzerland or Belgium.

later French is introduced and later becomes a language of instruction for mathematics and history. Luxembourgish is present in schools for informal interaction between teachers and learners but not as an official language of instruction though it often occurs in a translanguaging mode in courses officially taught in French or German. French grows in importance throughout secondary education where it becomes the main language of instruction (except in vocational or technical schools). English as a foreign language is also introduced in the first year of secondary education. The education system in Luxembourg is thus considered as “trilingual.”

In Alsace, a French border region with Germany where Alsatian – a Germanic language as well – is spoken, but where standard German has been adopted in the bilingual education program with French. A standard language, French, has also been adopted in the bilingual program in the Italian region of the Aosta Valley on the border between France, Switzerland, and Italy, a trilingual region where Franco-Provençal (a Gallo-Romance language) is spoken alongside French and Italian.¹² Another example can be given with the Southern Schleswig region between Germany and Denmark (Byram 1993; Søndergaard 1993) with Danish minority speakers and German minority speakers respectively in both states. However, in this particular border region, societal bilingualism has not led to new models of BE but to the language of the neighbor being introduced in the curriculum; for example, German is taught as a subject in Denmark, from kindergarten up to primary level in public schools, and as a language of instruction in some private schools. On the German side of the border, Danish has been adopted as the language of instruction in some private schools.

There are many such border contexts in Europe that have seen the development of different models of BE and some of them have been extensively described in the scientific literature (Baker and Prys-Jones 1998; García 2009; Mercator 2011¹³).

Colonial Contexts

The example of Malta, a Mediterranean island occupied by the British between 1800 and 1964 when it became independent, is interesting. Malta inherited the English language from this long period of colonization. The Maltese speak the two official languages, alongside different varieties of Maltese in rural areas. Its education system is bilingual in Maltese (a Semitic language) and English, the two official languages. School subjects are taught partly in Maltese (history, geography, religion, social studies) and partly in English (scientific subjects mainly), according to the

¹²The BE model will be explained below.

¹³Mercator : <http://www.mercator-research.eu> See also the website of Laval university for more information on the sociolinguistic contexts of these programs : <http://www.tlfq.ulaval.ca/axl>

language separation principle for teachers and subjects (Camilleri 1995, 2013a, b; Sciriha and Vassallo 2006; Sciriha 2013). The use of code-switching or translanguaging in the classroom is very widespread and considered as a major issue (Camilleri, 2013c). The teaching of a first FL (mainly Italian) is also part of the curriculum with a second FL as an optional subject. In the first survey on foreign language learning led by the European Commission¹⁴ (2012), Maltese pupils scored very highly in their first “foreign” language (English) as well as in the second (Italian).

Immigration Contexts

A distinction must be made between internal migration to Europe of civil servants working in European institutions and more recent migration, internal or external, of less qualified workers looking for employment. The first type of context gave rise to the famous and very much in demand European school model which has been amply described by Baetens Beardsmore (1993), for example. It is a very specific context where the majority of students come from privileged socioeconomic background.

The BE of minority migrant children with support given to their heritage language alongside the acquisition of the language of their new country is a newer and a far greater challenge to address. Whereas the bilingualism of well-off families is considered as cultural capital, the plurilingual repertoires of less socially advantaged students is often envisaged in terms of handicap so that the focus is on their acquisition of the dominant language of schooling. European legislation acknowledging the right of minority migrant students to be schooled through their first language is still lacking. This right only exists for speakers of regional minority languages.

Budach et al. (2008) describe a most promising model, a dual immersion program implemented in Frankfurt including German speaking and Italian speaking students. The model was then replicated for Turkish speakers and other immigrant language speakers and German speakers in other parts of Germany. We would like to argue that this widespread model used in the USA (García 2009) should be more developed in Europe, because this type of BE includes intercultural education and eventually helps to sustain social cohesion.

Contexts with a Strong Tradition of BE with FLT

Many European countries have been engaged in the development of bilingual programs with so-called “foreign languages” which can be either neighbor languages or not. In some Eastern European countries, as in Bulgaria for example (Ganeva 2008), some of these programs started in the 1950s with more or less elitist implementation,

¹⁴European Survey on Language Competence (2012) www.surveylang.org (cf Malta report).

which then became more egalitarian with time and now offer them in professional schools. Because Bulgarian is a Slavic language with a different alphabet from the Latin one, the first year of the bilingual program consisted in an intensive course in the foreign language. And then during the following years, this language was used in the teaching of many subjects (geography chemistry, biology, and physics). The Bulgarian model was then adopted in the 1990s by other Eastern European countries such as Poland where the first year of intensive language teaching was abolished (Gajo 2005).

These BE programs need to be described separately from CLIL programs because they existed long before CLIL models were conceptualized as such and because they are far more ambitious in terms of the number of school subjects taught in the target language, in relation to the engagement of teachers and learning achievement. These models of BE were complex educational projects which also needed parental support.

CLIL Contexts

Most European countries have a long tradition of teaching foreign languages (FLs) based on pedagogical approaches that have insisted on the importance of communication and intercultural education. However, teaching FLs as subjects did not meet with the expected level of competence, and this is one of the main reason for the success of the CLIL model: “a dual-focused educational approach in which an additional language is used for the learning and teaching of both content and language” (Coyle et al. 2010: (1) Beyond the different experience of learning content knowledge through two different languages, CLIL gives learners more exposure to the FL, and the FL changes status. Because CLIL is supposed to be content driven, it extends the experience of language learning, but in our opinion, it remains a weak form of BE mainly because it is conceptualized as an innovative FL teaching approach rather than as a new holistic education model.

In France, for example, before CLIL is implemented, 1 or 2 years of more intensive FL learning is offered to learners, based on the assumption that CLIL demands a high level of language competence. In most European countries, CLIL means that only one or at the most two core content subjects are taught through the additional language, therefore in very few contexts is CLIL close to partial immersion. However, CLIL can still be considered as an innovative methodology to offer a first introduction to a more intensive bilingual program.

A good overview of CLIL in Europe is available in two publications by Marsh et al. (2001) and Marsh (2002) written for the European Commission and the European Commission Eurydice Report. In 2007, Maljers et al. published a Council of Europe Report in which they highlighted the prevalence of CLIL in European education systems and the organizational structure of CLIL teaching in Europe (Maljers et al. 2007). In 2010, an edited volume by Dalton Puffer, Nikula and Smit gives an overview of empirical research, a critical discussion of unresolved theoretical concerns, and examples of research practice (in secondary and tertiary

education) (Dalton et al. 2010). An interesting development should be mentioned regarding new transnational certifications of bilingual competence being developed between different European countries such as the *Abibac* valid in France and Germany, the *Esabac* valid in Italy and France, and the *Bachibac* valid in Spain and France.¹⁵

Work in Progress

In this section we will contrast two contexts of BE in Europe, the case of France, a large state with a national education system where BE in dominant languages is very much in demand but offered on an optional basis, and the case of a small autonomous region in Italy, the Aosta Valley, where all students are educated bilingually.

Bilingual Education in France: The Influence of a Dominant Monolingual Ideology

In France, BE was first developed in the 1970s for the bilingual children of European and international elites under the denomination of “international sections.” Since 1982, an official text regulates this program. Students in these sections follow the regular mainstream curriculum and benefit from five weekly extra hours of CLIL teaching in a target “international” language, which for most of them is their L1 or one of their family languages. Students are assessed before entering international sections and they also get support in the main language of instruction, French. In other words, BE was implemented to support students who were for the most part already bilingual, but in dominant European languages.¹⁶ This is the best BE provision in France because both the home language and the school language are supported and the outcome is a high level of biliteracy, reinforcing the learners’ cultural capital. Furthermore, the learners are exposed to two curricula, the French curricula and the curricula of the subjects taught in the additional language.

However, as far as its conceptualization of BE, this model remains one of separation, where the two languages of instruction are never used together and where no common bilingual curriculum has been developed. In Garcia’s (2009: 52) terms this model is “simply double monolingualism” and does not build on the dynamic resources of the bilingual learners.

Ten years later, “European sections” were created for mainstream students based on the same additive model, although for learners with a different profile.

¹⁵These are exams in two languages which give European students a double diploma, Abibac which combines the German Abitur and the French Baccalaureate, ESABAC for the Italian Esame di Stato and the French Baccalaureate, and Bachibac for the Spanish Bachillerato and French Baccalaureate. For more information see <http://www.education.gouv.fr/>

¹⁶In other words, no such model exists for minority migrant languages, for example.

Three weekly hours of CLIL teaching are added to the regular curriculum for monolingual students who show enough motivation for FLL and who are high achievers, although theoretically such sections are open to all learners. European sections have become very popular in mainstream schools (they are less developed in professional high schools). In September 2013, 380,000 students were registered in these CLIL programs¹⁷ representing 7 % of the total population attending secondary education. Many languages are included – English, German, Spanish, Italian, Portuguese, Dutch, and Russian – but English is the dominant choice of families (69 %). Different school disciplines can be taught through these languages from economics to physics, sports, maths, history or geography, etc.

On the whole, CLIL in France can be considered as a minimal form of bilingual education since only one school subject is taught through the medium of the FL and the program usually starts in higher secondary education.¹⁸ However, students are granted a special mention for their final secondary examination giving them extra qualifications. European sections are also considered by parents as giving better educational opportunities to their children. Interestingly, from the policy point of view, when European sections were created, they were meant to include so-called “oriental” languages as well – Russian, Arabic, Mandarin, Vietnamese, etc. In practice, there are very few “oriental sections,” and it is difficult to find statistics dealing specifically with these languages because the denomination of the program integrates oriental languages into European languages (SELO¹⁹). No information is available either on whether the students choosing oriental sections are speakers of these languages or not, thus CLIL education in immigrant minority languages which can theoretically be offered within this policy remains in practice mostly absent from schools.

Hélot has shown in previous publications (2008a, b) how bilingual education in France is available under different models according to the status of languages concerned. When European and oriental sections were created for monolingual learners, the main objectives were both to improve FLL and to develop in learners a European identity. Within this framework, Zirotti (2006), for example, analyzed the lack of reflexion on the specific status of immigrant minority languages. Their integration alongside European languages, which in policy terms looks like a positive measure, has in fact rendered invisible the lived experience of speakers of these languages and their bilingual bicultural competence Hélot and Young (2005). Although this chapter is discussing bilingual education in European languages, we cannot overlook the way French and European language policies have kept minority immigration languages on the margins of a general language education policy. (See chapter on “Immigration/flow, hybridity and language awareness”).

¹⁷A special website called EMILANGUES is dedicated to this teaching approach : <http://www.emilangues.education.fr/>

¹⁸Students enter European sections in lower secondary schools, but the program at that level is a preparation for CLIL with more hours of FLT.

¹⁹SELO: Section européenne et de langues orientales.

A Promising Model: Bilingual Education in the Aosta Valley

An interesting model of BE was developed in the Aosta Valley, a small autonomous region (since 1948) situated in Northwest Italy between France and Switzerland. This context is an example of a French-speaking region that was never colonized nor dominated by the French state. Today, due to internal and external migration, the Aosta Valley is multilingual and Valdostan speakers are bi- or plurilingual.

Italian and French are the two official languages (French being a minority language) and this policy gave birth (from the 1970s to the 1990s) to BE and to the adaptation of the Italian curriculum to use the two languages in instruction. Three bilingual educational reforms dealt progressively with preprimary, primary, and lower secondary levels. The senior high school level is not concerned at present so the model is not yet complete. The originality of the model is based on the policy choice at the outset not to create the societal inequalities that are often induced by monoglossic ideologies of bilingualism (one school/one language, one language/one person, one subject/one language, etc.), and as a result also prevent conflict within the teaching profession. Thus in the Aosta Valley schools, all students are educated bilingually (in Italian and French) from preprimary school and also learn one FL (English) from the first grade of primary school. All subjects are taught bilingually and all teachers (in the three levels mentioned above) have to teach bilingually, in Italian and French during an equal number of hours (Cavalli 2005). The presence of three languages in the curriculum, as well as some other languages that are part of the students' repertoires, has led to a serious reflexion on an integrated approach to language instruction. The objective has been to create didactic links between the different approaches to language teaching and to support the development of transfer strategies on the part of learners so as to sustain cognitive as well as didactic efficiency in language acquisition and learning (Bertocchi 1998). In other words, the objective was to encourage the cooperation of language teachers to draw out all the possible links between the different linguistic systems so that learners would reflect on their different languages through comparison and learn these languages more efficiently as well as develop strategies of transfer.

Furthermore, BE in the Aosta Valley has benefited from a clear conceptualization of the bilingual subject and bilingualism based on recent psycholinguistic research (Grosjean 2010) and on discourse analysis (Py 1997). The Aosta Valley model adopted a more realistic and undoubtedly more complex vision of bilingualism than previous traditional representations of bilingualism as the symmetrical and equal addition of two languages. Thus, the model was based on the notion of language choice and code-switching (Coste 1994) allowing learners to avail themselves of the diverse modes of discourses specific to bilingual individuals and described by researchers as the monolingual mode (in one or the other language) and the bilingual mode (alternative or simultaneous use of both languages).

Another dimension should be underlined here: contrary to other models of BE which are focused mainly on language acquisition, the bilingual model in the Aosta

Valley has explored the cognitive advantages of using two languages to acquire core content knowledge and the pedagogical implications that translanguaging can play in this complex process. Linguists, scholars of pedagogy, and practicing teachers have joined together to carry out numerous action research projects (Cavalli 2005) which have demanded in depth analysis of the epistemological dimension of school subjects in relation to knowledge conceptualization, methods, and materials used in class as well as interactive activities. It has also been necessary to investigate the role of language in the construction of knowledge and the way in which the alternation of two languages can contribute to a more efficient acquisition of knowledge (Coste and Pasquier 1992; Coste 2000; Gajo and Serra 2000; Py 2003).

This body of research has produced substantial knowledge on bilingual methodology and didactics that has been confirmed by other research on student achievement, but it has had a limited impact on the overall education system in the Aosta Valley because of lack of adequate dissemination and political follow-up (Council of Europe and Autonomous Region of the Aosta Valley 2008). However, the Aosta Valley has provided a very interesting context to many researchers and experts on bilingual education in Europe. More specifically, research has focused on the way languages are not as important in themselves as they are as resources for speakers to express themselves and to learn.

Problems and Difficulties

Despite the wide support of various models of bi- or plurilingual education by European education systems, some problems and difficulties remain. First, we would like to address the issue of the right of all students to have quality BE available to them. While some contexts like Luxembourg, Malta, or the Aosta Valley offer bi- or trilingual education to the whole student population, these situations are rather rare and do not necessarily guarantee equity of opportunities for all students. For example, in Luxembourg, over 40 % of children in preprimary and primary education are foreigners (the majority are Portuguese speakers) and only 15 % access general secondary education (Weber 2009). Therefore, learning through Luxembourgish, then German, and then French is a different schooling experience for these learners than that of Luxembourgish speaking children, particularly if support at school of their home languages is not available. Plurilingual education in this case does not bring the same advantages to all learners and can even put some of them at an obvious disadvantage.

In other contexts, our analysis of policies (Hélot 2008a, b) and our observations and interviews with learners and teachers have uncovered an elitist bias to BE in the European context. Whatever the language concerned, BE ends up being perceived as a privilege and as a sign of social distinction. In Alsace, for example, choosing the

bilingual stream in a regular school is considered as offering one's child not only better educational opportunities but mainly a superior learning environment among high achieving peers. Similarly, Mehisto (2008) remarks that CLIL attracts mostly academically bright students. Other researchers have pointed to the same elitist bias when BE or CLIL is not offered to all students. In Spain, for example, Lasagabaster and Sierra (2010) have noted that immigrant students rarely attend CLIL programs (in English). No similar research has been carried out in France, but the same phenomenon could probably be observed.

Yet the cognitive, cultural, and intercultural potential of BE should not be the prerogative of the more educated social classes. In our present times of economic crisis, the knowledge of additional languages has become central to upward social and professional mobility and all learners should be able to avail of it equally. This is particularly true for students in professional schools who are the first to be confronted to the world of work and who should have access to highly efficient BE approaches to their education and training.

In view of the popularity of the CLIL model in Europe, one of the main problem remains the lack of conceptual clarity of all the models of BE implemented under this label. Cenoz et al. (2014: 257) argue convincingly that there are no widely accepted definitions of CLIL and that it hampers research and educational initiatives. Because there is no clear understanding of different versions of CLIL "there is a critical need to refine the definition of CLIL in ways that systematically and coherently recognize this diversity of formats." They also explain that there has been an ideological choice on the part of researchers in Europe to differentiate CLIL models from immersion programs in Canada and the USA. The various arguments in favor of CLIL are shown to be fragile in the light of all the research carried out in North America, and researchers on both sides of the Atlantic could benefit from a less divisive approach to content-based language instruction.

As to the problems linked to the implementation of bilingual education, the main difficulty resides in the persistent monoglossic representations of bilingualism (García 2009; García and Li Wei 2014), where bilingualism continues to be seen as the addition of two parallel instances of monolingualism. Some contexts of bilingual education expect such normative and equilingual level of competence that they are unrealistic as far as what schools can achieve (Cavalli et al. 2003). These representations then influence the evaluation of bilingual learners' competence, which should be considered differently from that of their monolingual peers. Evaluating bilingual learners with the same criteria as monolingual learners is the regular practice of comparative international evaluating bodies: it means that bilingual learners' specific competences are not evaluated equitably. New evaluation modalities must be developed, taking into account all the resources of the students' plurilingual repertoire as well as the complexity and specificity of their bi-plurilingual competence (Shohamy 2006). This said, one should also mention the fact that regions such as the Basque Country and the Aosta Valley, which offer bilingual education widely, do score better in PISA evaluations than their monolingual neighborhood country, Spain and Italy.

Finally, we should point to the hegemony of the English language in most CLIL and FLT programs in Europe,²⁰ despite the Council of Europe's recommendations to protect linguistic and cultural diversity. English is the language most in demand by parents and students and strongly supported by public opinion. This plays a major role in language policy since most countries in Europe (apart from those where English is the official language) impose English as an obligatory first foreign language. The same phenomenon can be observed with CLIL programs in Europe that have attracted mostly scholars and practitioners in the field of English as a foreign language (Cenoz et al. 2014). Even in countries where CLIL is offered in several European languages (as in France, for example) the vast majority of students choose the CLIL programs in English, not necessarily to experience a form of bilingual education but to acquire a higher level of competence in English. The dominance of English in CLIL programs also means that other European languages are less frequently offered and that minority migrant languages have even less chances again of being included in CLIL provision. The fact that immigrant minority languages are not perceived as useful learning resources in terms of linguistic and inter or cultural knowledge is clearly one of the biggest challenges in European education today (European Commission 2008).

Future Directions

BE is not just a further step to improve FLT or a new development in content subject methodology. It is an innovative approach of integrated didactics which aims at uncovering all the possible convergences between the linguistic and cultural resources of learners, their home languages, the languages of instruction, and eventually the additional languages present in the curriculum, between the two (or more) languages of instruction and the core content subjects, and between the different school subjects themselves. According to the European Commission website,²¹ BE is meant to build intercultural knowledge and understanding, to develop intercultural communication skills, to improve language competence and oral communication skills, to develop multilingual interests and attitudes, to provide opportunities to study content through different perspectives, to allow learners more contact with the target language without requiring extra teaching time, to complement core content knowledge rather than compete with it, and to increase learners' motivation and confidence in both languages and subjects being taught.

This is feasible if teachers are prepared to cooperate beyond the strict borders of their subjects and of the dominant language of instruction. This means new

²⁰In the EU 28 in 2012, English was still the most commonly studied foreign language at lower secondary level, with 97.1 % of pupils learning it, far ahead of French (34.1 %), German (22.1 %), and Spanish (12.2 %). The importance of English as a foreign language in the European Union is also confirmed by its No.1 position in nearly all member states. (cf. European Survey on Language Competences: www.surveylang.org).

²¹www.ec.europa.eu Languages, bilingual education.

interdisciplinary approaches must be developed at two levels: a collegial planning of plurilingual didactic approaches as well as the implementation and evaluation at classroom level of all teaching activities. It presupposes the sharing or negotiation of common conceptions of language acquisition in the dominant and additional languages, common representations (nonidealized) of what it means to be a bilingual person and to learn bilingually, and a common understanding of the role of language and languages in the construction of core content knowledge, of the very specific role of using two languages to learn content, of the transfer strategies to implement with learners, and of the didactic strategies to support bilingual acquisition and learning.

All these issues imply a reconceptualization of initial and professional teacher education. Action-based research through the collaboration of teachers and researchers is considered the best path for bilingual teachers to envisage their identities beyond just being a language teacher or a subject teacher. Bilingual teachers need to apprehend the complexities of BE models and to question the ideologies at work in their professional contexts. More research is also needed across different contexts of bilingual education to compare levels of acquisition, to showcase examples of good practice, and to describe specific conditions leading to successful BE. There are enough varied contexts and models in Europe today to engage in comparative research projects that could support our schools to embrace not only bilingual but plurilingual education and prepare the future citizens of the twenty-first century to navigate linguistic and cultural pluralism.

Cross-References

- ▶ [Bilingual Education in Migrant Languages in Western Europe](#)
- ▶ [Bilingual Education Policy](#)

Related Articles in the Encyclopedia of Language and Education

- A. Blackledge: [Language Education and Multilingualism](#). In Volume: Language Policy and Political Issues in Education
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Bilingual Education in Migrant Languages in Western Europe

Sven Sierens and Piet Van Avermaet

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Abstract

This review focuses on bilingual education (BE) in migrant languages in Western Europe. In the Early Developments section, we will argue that educational arrangements targeting migrant languages initially arose from bottom-up initiatives for immigrant children. In the Major Contributions section, we will discuss the pioneering role of both the local and supranational levels in developing migrant language programs and policies in mainstream schooling and promoting multilingualism as civic ideology. Although these initiatives focused on mother tongue instruction (MTI), BE came forward as an alternative approach, reaching a peak in the late 1970s/early 1980s and resulting in a limited number of local experiments in transitional BE. However, national states in Western Europe have been reluctant to include migrant languages in their language-in-education policies. BE in migrant languages has nowhere been able to establish itself as a fully

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valued teaching model. Notwithstanding this, two-way immersion models offering migrant languages are currently successful in Germany – as is pointed out in the Work in Progress section. Although practical problems can partially explain the difficult introduction of bilingual approaches in education for immigrants, the principal obstacle is the monolingual ideology that underlies educational and social integration policies and practices across Europe. A return to assimilation has resulted in dwindling official support of MTI/BE in many Western European countries in the past decade (Problems and Difficulties). In the final section, we will outline some Future Directions, of which the challenge of linguistic superdiversity of school populations for received language-in-education approaches is most important.

Keywords

Bilingual education • Mother tongue instruction • Migrant language • Language-in-education policies • Western Europe

Early Developments

The focus of this review is on education programs and policies targeting migrant languages in Western Europe, including the Nordic countries. This refers to countries with a long history of immigration after the Second World War, which is linked to their industrial development, their colonizing pasts, or both (Eurydice 2009). Some Nordic countries – Finland, Iceland, and Norway – for their part experienced immigration from outside Nordic and Western countries more lately (1990s–). This choice implies the exclusion of Southern and Eastern Europe from this review. These were traditionally countries of emigration; since immigration is a more recent phenomenon, it seems likely that bilingual education (BE) for immigrant children is still in its infancy or absent altogether, given the lessons learned in Western Europe, the contemporary influx of Middle Eastern and African immigrants and refugees crossing the Mediterranean Sea to mainland Italy, and the changing socio-linguistic situation (see below: “[Future Directions](#)”).

The labor immigration to Western Europe involved various groups of migrant workers from Mediterranean countries (Southern Europe, North Africa, and Turkey) from the late 1950s onwards. This immigration quickly turned from temporary stay into de facto permanent residence and family reunion and/or formation in the immigration countries (de Bot 2010). At the same time, host countries with a colonizing history, such as France, the UK, the Netherlands, and Belgium, also received immigrants from their former colonies. Since the 1990s, new influxes of immigrants, asylum seekers, and refugees have come from Eastern Europe and, increasingly, other parts of the world (sub-Saharan Africa, Latin America, and Asia).

Migrant languages have recently emerged as minority languages spoken on a wide scale in Europe. Turkish, Arabic, Berber, and Tamil are examples of non-European migrant languages that nowadays are spoken by millions of inhabitants of Western Europe (Extra 2013). What “migrant languages” are, how they can

be distinguished from other types of languages (national, regional, trans-frontier, or non-territorial), is not as straightforward as it may seem. The designation of languages refers to different contexts and policy visions, which vary across European nation states, and may evolve through the course of time (Kroon and Vallen 2010). Moreover, changing contexts of migration and processes of ethnic minority formation can make distinctions between languages ambiguous (Extra 2013). For example, Italian, Spanish, and Portuguese are languages spoken by labor migrants in former times but have over the years gained in prestige as official national languages spoken and learned by many EU citizens.¹ Certainly, these examples are national languages of EU member states, which were already treated more positively in the past. The European Commission (EC) issued a directive in 1977 (Directive 77/486/EEC) in which EU member states are required to offer free tuition to children of workers who are nationals of another EU member state, including in particular the teaching of the official language of the host state, and to promote, along with regular education, the mother tongue and culture of the country of origin.²

The consecutive waves of large-scale immigration, EU free movement, and lately rapid globalization have increased linguistic diversity across Western Europe. Since international migration initially concentrated in urban settings, multilingualism is still most prevalent in cities (Extra 2013). Various sociolinguistic surveys (e.g., the Multilingual Cities Project; see Extra and Yagmur 2005) have documented this trend of increasing diversity of community languages – sometimes called the “Babel effect” – in city populations across Europe.

At the outset, educational arrangements for teaching migrant languages arose from voluntary initiatives for children of immigrants. Such “self-organization” spontaneously emerges where immigrant groups have settled for a longer time; traces of this can be documented in the history of almost every immigration nation and group (see Glenn 1996). Bottom-up initiatives promoting mother tongue development and maintenance are a recurring phenomenon in immigration contexts up to the present. Immigration contexts are constantly changing as new migrant and ethnic communities continue to arise, and newcomers usually make efforts to pass on their languages and cultures of origin to the generations born in the immigration country.

In the past and now, mother tongue instruction (MTI) has been organized by immigrant parents and associations with or without support of the official authorities of their countries of origin. This takes, in most instances, the form of after-school programs outside the formal education system or outside of school hours within the mainstream school. In the UK, this is referred to as “complementary education/schools” or “community language schools” (Li Wei 2006). The major purpose of such initiatives is maintaining the immigrant child’s connection with the language and culture of the home country (Fase 1994). At the outset, the goal is often to prepare immigrant children for their possible return to the home country (Reid and

¹Admittedly, the official languages are “standard” varieties, which are being privileged, while most immigrants speak “nonstandard” varieties, which are still frowned upon.

²See <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:31977L0486>. Accessed 7 Jan 2015.

Reich 1992). The goal of reintegration was also very central to the concept of “national classes,” which were organized in various parts of Germany (e.g., Bavaria, Baden-Württemberg) and which offered separate bilingual instruction for groups of students of a single foreign origin (Glenn 1996).

Major Contributions

Education programs that include migrant languages consist of various approaches. BE is sometimes used as an umbrella term for all models in which migrant languages are taught or used (e.g., Kroon and Vallen 2010). However, we will maintain a stricter definition of BE here, which more or less distinguishes it from MTI (Hamers and Blanc 2000). In MTI the migrant language is a teaching subject in its own right; in BE the migrant languages are used alongside the majority language as media of instruction in a variety of school subjects (Kroon and Vallen 2010).

From the 1970s onwards, a variety of small-scale experiments in MTI/BE involving small proportions of immigrant children have been conducted across Europe. Political aims were generally vague and diverse and have changed over time (see Driessen in Söhn 2005a). Next to locally developed initiatives, 36 pilot projects were carried out between 1976 and 1991 within the framework of the action program on the education of the children of migrant workers supported by the EC, which was in line with the abovementioned EC 1977 Directive. These projects showed a wide range of objectives and approaches to the integration of immigrant children in regular education (Reid and Reich 1992).

To the extent that the languages of origin of the immigrant children were given attention, these projects usually provided MTI: instruction *of* the first language (L1) rather than *in* the L1 (yet some teaching of cultural content matter in the L1 may be part of a program). A key feature of these projects was a deliberate move of MTI for migrant students into the school curriculum. The main legitimation at the beginning was the idea that the possibility of return to the country of origin should be held open. This was abandoned at a later stage, as it became clear that temporary migration had changed into permanent settlement, and that therefore MTI should support integration in the new society (Reid and Reich 1992).

Over the years, BE in migrant languages has come forward as an alternative approach to MTI, reaching a peak in Western Europe in the late 1970s/early 1980s. It explicitly defines bilingualism as the central element of the immigrant children’s linguistic experience and competence and then proceeds to build up the two languages from there (Reid and Reich 1992). More specifically, the idea was taking root that teaching literacy and subject matter through the L1 is desirable for immigrant children for pedagogical reasons rather than political and cultural reasons. In other words, it is the valorization in BE of the L1 as a cognitive tool for learning by the school which contributes to improving the school performance and educational opportunities of immigrant children from socioeconomically disadvantaged backgrounds (Hamers and Blanc 2000). The theoretical framework for this approach lies

in research which highlights the role of well-developed cognitive-academic skills in L1 in providing a foundation for academic development in L2 (e.g., Cummins 2000).

In the following, we will offer an overview of selected examples of BE in Western Europe focusing on relatively strong models, which were subject to evaluative investigation.

- The Södertälje Program for Finnish immigrant children in Sweden was started in 1973. This program involved second-generation immigrants and used Finnish initially as the major initial language of instruction and continued its use throughout elementary school, although Swedish became the major language of instruction from grade 3. At the end of the elementary school, children obtained results comparable with Swedish and Finnish control groups who had been instructed monolingually (Hanson, 1979 as cited in Cummins 1983 and Hamers and Blanc 2000).
- The Lund Composite Bilingual Program for Finnish-speaking students in Malmö, Sweden, was an experimental program of which the evaluation was conducted between 1972 and 1980. The instructional model consisted of a 2-year Finnish preschool program followed by instruction in both Finnish and Swedish from grade 1 to grade 3, with transition to regular Swedish classes at grade 4. Although the grade 3 Finnish students performed roughly one standard deviation below national norms in both Finnish and Swedish academic language skills, their performance in all academic trajectories except Swedish was similar to that of their Swedish classmates. The researchers attributed the generally low scores of all students in the project school to their low socioeconomic background. The Finnish students appeared to be developing Finnish proficiency more adequately than similar immigrant students in Swedish-only classes. The lack of an adequate control group makes it difficult to evaluate the success of the program, but it does appear to have been at least moderately successful (Löfgren and Ouvinen-Birgerstam, 1982, as cited in Cummins 1983).
- The Leiden model of schooling (*Leidse opvangmodel*) in the Netherlands was an EC-funded experiment (1977–1980) in bilingual-bicultural education which focused on recent Turkish and Moroccan immigrant children aged 6–12 in reception classes. Subjects taught in L1 were mother tongue, arithmetic, environmental studies, civic education, and religion. L2 lessons in the first year were language lessons (oral and literacy acquisition); from the second year onwards, arithmetic and environmental studies were also taught in L2; in the third year, the pupils were transitioned to mainstream schools in primary or secondary education (Appel 1984; Cummins 1983). Appel (1984) in his evaluation study demonstrated that the L2 proficiency of the pupils in the experimental group was not inferior to the one of their peers in the control (L2-only) group; on a number of measures, the bilingual program pupils performed better.
- The Bicultural Education model in Enschede (1979–1982) was similar to the Leiden model but aimed at second-generation Turkish and Moroccan migrant children born in the Netherlands. The model included preschool education and was relatively more oriented towards L1 maintenance. The results of the

investigation by Teunissen (1986) were more or less in line with the results of the Leiden study above.

- The Bicultural and Trilingual Education model in Brussels, Belgium, is one of the most interesting, well-documented, and long-standing programs in Western Europe (Cummins 2000; Reid and Reich 1992). It ran between 1981 and 2011, and was initiated by Foyer, a non-state organization concerned with the well-being of immigrant communities in Brussels. Its central goal was to enable children to acquire fluency and literacy in three languages (Dutch, French, and one of the following migrant languages: Italian, Spanish, Turkish) by the end of elementary schooling. The L1 support was integral to the program rather than a supplemental enrichment. An extensive evaluation study conducted in 1986–1987 showed that trilingualism in immigrant students could be developed at no cost to their achievement in the school language (Dutch) (Byram and Leman 1990).
- The Bradford Mother Tongue and English Teaching (MOTET) project in Bradford, England, consisted of a 1-year BE program in two schools for two groups of 5-year-old native speakers of Mirpuri (a Punjabi dialect) who at the start of the project had little or no knowledge of English (Rees, 1981, as cited in Cummins 1983). Time was shared equally between the two languages overall and over the patterning of the school day. The results of the evaluation study indicated that one experimental group obtained superior results in English-comprehension skills to the control group, but the reverse was true for the other group; both groups scored higher on English-expression measures and on all Punjabi tests. These results were confirmed in a follow-up study (Fitzgerald, 1987, as cited in Hamers and Blanc 2000).

In addition, Reich and Roth (2002) mention BE experiments including migrant languages in Germany (Greek and Turkish in the Krefeld model, early 1980s) and Denmark (Albanian, Arabic, Turkish, and Urdu in the Copenhagen experiment, 1996–1999). Although the above programs put more emphasis on the goals of both L1 and L2 acquisition, the applied program models of BE were relatively “weak.” They were transitional programs in preschool and primary school which primarily did not intend functional bilingualism (Reid and Reich 1992). Even if programs aimed at developing a certain degree of bilingual competence and L1 maintenance, it was more likely that in the long run the students would become dominant in L2 and acculturate (Fase 1994; Hamers and Blanc 2000). After all, the (intended) result of transitional BE is monolingualism.

Both the local level – grassroots and official – and the supranational European level have played a pioneering role in the development of migrant language programs and policies as part of the mainstream school curriculum. Local spaces (authorities, schools, associations) are the natural habitat for the emergence of bottom-up initiatives that positively address the growing linguistic and cultural diversities. The supranational level, for its part, constitutes institutions that have created frameworks and policies in response to challenges arising from multilingual spaces and international migration. European institutions have been important agents

of multilingualism (European Commission, Council of Europe, European Centre for Modern Languages). The governments of the countries of origin, through their embassies and consulates, also have been significant stakeholders in immigration countries in Western Europe. MTI is often provided under bilateral agreements that a number of receiving countries (Belgium, France, Luxembourg, some German federal states) entered into with the countries of origin (Eurydice 2009).

BE programs and policies are generally defended on ideological grounds, in the name of linguistic and cultural pluralism (Hamers and Blanc 2000). The rhetoric and practice of BE in the last three decades of the twentieth century was mainly based on civic ideologies that favored or accepted multiculturalism and as a consequence considered multilingualism as a right or at least as a resource in education (Kroon and Vallen 2010). Since national states in Europe are the major players in charge of language-in-education policies (Busch 2011), the question is to what extent different (sub)national governments have adopted official policies which favored the inclusion of migrant languages in education, as promoted by agents at the local and supranational levels. This is not self-evident when viewed against the backdrop of monolingualism which dominates nation state ideologies in Western Europe (see below: “Problems and Difficulties”).

National policy responses to multilingualism and migrant language education in Western Europe have been quite diverse in the past decades, having shown crossnational variation as well as shifts through time within countries, both in terms of rhetoric and practice (Eurydice 2009; Fase 1994; Glenn 1996; Tolley 2011). One can distinguish roughly three main responses. The first response can be called an active multilingual policy, including legal measures and facilities for special provision of education in migrant languages in mainstream schools. Examples of such relatively progressive – sometimes temporary – responses are: Sweden (1977), the Netherlands (1974–2004), the German federal states of Hesse (1978–1999)³ and North Rhine-Westphalia (1970s/2000), Finland, Denmark (1976–2001), Norway (1998), Austria (1992/2000), and, partly, Flanders, the Dutch-speaking part of Belgium (1991–2011). However, in countries where active multicultural/multilingual policies have been shaped by the national authorities, these merely softened the daily school regimes and prevailing ideologies of cultural and linguistic assimilation. The second response is more one of symbolic multilingual policies: education in migrant languages is legally outlined and permitted but the central government takes no further commitments to provide top-down structural support. Provision and funding, therefore, depend largely on initiatives taken by local agents (municipalities, schools) and/or the states of origin, which results in overall limited or patchy implementation. Norway (1978–1997), Switzerland (1991/2004), France (1975), Iceland (1996), Ireland (very limited), Luxembourg (1983), the French-speaking part of Belgium (1996), and a number of German federal states (Berlin, Bremen, Hamburg, Saarland, Schleswig-Holstein) are to varying degrees examples of this type of response. A third response is monolingual and is reflected in

³Hesse occupies a special place in that MTI had been made compulsory in 1983.

policies which explicitly prioritize a hard-line L2-only approach in education; the state authorities ignore or are indifferent to special language arrangements such as MTI and BE for immigrant students within the school curriculum and leave the responsibility of these arrangements to the immigrant groups themselves. The UK is a clear example of this response; drawing on the rhetoric of egalitarian principles, educational authorities in this country are very hesitant to tolerate special treatment of ethnic minority groups through targeting their languages (Fase 1994).

All in all, despite positive developments in the past on the local and the supra-national levels, national states in Western Europe have been in most cases reluctant to adopt migrant languages in their language-in-education policies, regardless of differences in history and the scale of immigration. Hence, BE in migrant languages has nowhere in Western Europe been able to establish itself as a fully valued teaching model within educational practice. Up to the present, clear policies outlining the main principles for BE in migrant languages have been mostly lacking; BE is not consistently offered in all school types and levels of education across European countries (Kroon and Vallen 2010; OECD 2010).

Work in Progress

An important development of relatively recent date is the implementation of two-way immersion (TWI) models offering migrant languages in partnership with the dominant national language. In TWI, learners have two different backgrounds (native speakers of the majority language and speakers of a minority language) and students are taught in relatively balanced groups. TWI programs show a clear emphasis on L1 enhancement and development of biliteracy in minority students (Busch 2011). According to Meier (2010) the work in progress on TWI in Europe has so far not been well documented and is hardly ever been mentioned in the English language research literature.

We are only aware presently of TWI projects including streams with migrant languages in Germany (see Duarte and Gogolin 2013). Meier (2010) mentions a surge in interest in TWI in the UK but the bilingual streams in schools and projects have not targeted migrant languages up to now.⁴ TWI programs have gained foothold in a number of German cities and continue to grow.

An early example of TWI is the German-Italian school in Wolfsburg, which has served as model for many other TWI projects in Germany (Söhn 2005b; Meier 2010). The *Staatliche Europa-Schule Berlin* (SESB) – i.e., the State Europe School Berlin – is the most extended program of TWI in Germany. It was founded in 1992 and currently includes a network of 18 primary and 14 secondary schools offering immersion programs in nine different language combinations, including German and another partner (migrant) language (English, French, Greek, Italian, Polish,

⁴See directory on the Bilingual Immersion Education Network (BIEN) website: <http://elac.ex.ac.uk/bien/>. Last accessed 7 Jan 2015.

Portuguese, Russian, Spanish, and Turkish) (Meier 2010). In 2010, nearly 6,000 students were enrolled. Linguistic and sociocultural benefits have been documented yet only for language streams not including migrant languages.⁵ Another well-established TWI project, which was modeled on its predecessors in Wolfsburg and Berlin, is the *Bilinguale Grundschulklassen* (bilingual primary school classes) being run in Hamburg (Duarte 2011; Meier 2010; Reich and Roth 2002). It is funded by the city of Hamburg and the consulates. This project was started in 1999 initially offering language streams of Portuguese and Italian next to German in primary school. Later on, schools following the same model started offering Spanish (2001) and Turkish (2003) as partner languages. The entire project has been scientifically accompanied and evaluated from the beginning (Dirim et al. 2009). Other German TWI trials mentioned in the research literature (Meier 2010; Reich and Roth 2002; Söhn 2005b) are a German-Italian program in Hagen (North Rhine-Westphalia, set up in 1998), the Nuremberg model of TWI German-Spanish, the *Europaschulen* in the state of Hesse, and a German-Italian primary school in the city of Frankfurt am Main. The main focus of the latter has been on simultaneous bilingual literacy teaching and learning, collaborative bilingual team-teaching, and crosslinguistic and cross-subject curriculum planning. This project has been the object of several ethnographic studies (e.g., Budach 2013).

Problems and Difficulties

From the beginning, the arrangement of programs offering migrant languages in mainstream schools has experienced a variety of practical and logistic problems. First, providing MTI/BE to all immigrant students can be very costly and difficult to implement, particularly when many different languages are present, which is the reality in many schools today (Nusche 2009). Second, prerequisites for high-quality implementation have not always been adequately fulfilled, partly due to lack of official support. Identified key issues relate to guidelines and curricula, availability of qualified teachers, teaching resources, pedagogical methods, alignment with regular education, whole-school embedding, parental support, etc. (Driessen in Söhn 2005a). Third, the long-standing collaboration with the authorities of the countries of origin in organizing MTI/BE in some immigration countries has always been a sensitive issue. Their support is a convenient, cost-effective arrangement for states that have been reluctant to adopt L1 provisions for immigrant children within their education systems. However, the temporary engagement of so-called embassy teachers remains controversial. Their lack of integration in mainstream school settings, insufficient proficiency in the majority language, and initial unfamiliarity with the sociocultural and educational contexts of the immigrant children are problems frequently reported in research and policy documents (Glenn 1996).

⁵See http://www.berlin.de/sen/bildung/besondere_angebote/staatl_europaschule/. Last accessed 7 Jan 2015.

Fourth, it may also be difficult to provide education in migrant languages when the language spoken at children's home is a regional variety or an unofficial language, which is the rule rather than the exception (Nusche 2009). Critical questions have been raised about programs in which standard languages from the countries of origin are taught to children speaking informal languages at home (the use of Modern Standard Arabic in teaching Moroccan children speaking Berber or Moroccan-Arabic is a case in point; see Driessen in Söhn 2005a).

Although the above problems help explain the difficult introduction of bilingual approaches in education for immigrants in Western Europe, the principal obstacle to the inclusion of migrant languages is ideological. Mainstream educational and social integration practices in Europe essentially remain rooted in the one-nation one-language dogma (Meier 2010). Holding a deep conviction that monolingualism is the normal state of a national education system, most key stakeholders in Western European education systems argue for total submersion of immigrant pupils in the national school language(s). This is considered the most legitimate way of minimizing the often presumed negative effects on school achievement of the lack of L2 exposure in the home ("the bilingual handicap"), as well as furthering social coherence in society and national identity formation through the use of a single public language.

Since the turn of the century, a return to cultural assimilation in Western Europe has marked a renewed emphasis on learning the majority languages through hard-core submersion programs. This heralds a backlash against multiculturalism as the ideological framework in the leading discourses, policies, and practices, as is established for certain countries by Vertovec and Wessendorf (2010). Under the pressures of a politically unfavorable climate and budgetary restrictions, education in migrant languages has come increasingly under attack (see Gogolin in Söhn 2005a). This negative shift in public and scholarly appreciation of inclusion of migrant languages in education has often gone hand in hand with more restrictive and defensive national immigration and integration policies (Kroon and Vallen 2010). This shift has led to explicitly reinforcing subtractive goals, thus downplaying the value of L1 proficiency and bilingualism in migrant students. This tendency, in turn, has resulted in dwindling official support of BE and MTI for immigrant minorities all over Europe (OECD 2010). Examples of legislative and financial policy changes in this direction can be noticed in Hesse/Germany (1999), Denmark (2002),⁶ the Netherlands (2004), and Flanders, Belgium (2011).⁷ Unsurprisingly, BE programs targeting migrant languages have been disappearing from the Western European educational landscape over the past decade or so. What remains today – apart from

⁶The Danish Education Ministry announced in 2013 an experimental reintroduction of MTI in primary school.

⁷The policy in Flanders was not completely overturned. In 2011, the then Flemish education minister decided to stop funding the Bicultural/Trilingual Education project in Brussels (see above). Provisions on the basis of the so-called supportive model (optional MTI lessons up to a maximum of 20 % of the available instruction time) are still offered but show declining use in actual practice.

the German TWI projects – are mostly grassroots initiatives outside formal education (e.g., complementary schools, “Saturday schools”).

On closer examination, a double-standards discourse regarding multilingualism and education prevails in Western Europe: while knowledge of several EU national languages and/or international prestige languages is highly valued as cultural capital of the so-called European citizen, European institutions in the first place have not (yet) extended this principle to migrant languages (Rindler Schjerve and Vetter 2012). In this respect, regional or indigenous languages (e.g., Frisian, Basque, Gaelic, Welsh, Sami) are much better off. Even in countries where BE is currently favored in national policies, this does not signify greater openness to migrant languages. For some time, the use of low-status migrant languages in schools has been considered as a provisional, supplementary arrangement to facilitate the move to the L2 and the mainstream monolingual program. Ultimately, however, immigrants are expected over successive generations to give up their home languages for the sake of successful integration into mainstream society.

Future Directions

Today, a new stage is emerging in the history of migration in Western Europe which is denoted by the terms globalization and superdiversity. Superdiversity is characterized by a tremendous increase in the categories of migrants, not only in terms of nationality, ethnicity, language, and religion but also in terms of motives, patterns and itineraries of migration, processes of insertion into the labor and housing markets of the host societies, and so on (Vertovec, as cited in Blommaert et al. 2011, p. 1). This tendency has a number of sociolinguistic and pedagogical consequences for language-in-education policies and practices (for a review see the papers in the special issue edited by Blommaert et al. 2011; see also Duarte and Gogolin 2013). These consequences also create new challenges for advocates of education programs offering migrant languages. First, the greater diversification of immigrant groups in Western Europe is reflected in a greater diversification of migrant languages in urban school populations. Moreover, since globalization also affects the margins of Western European societies, linguistic diversity is now extending from metropolitan zones to smaller cities and nonurban areas. Given the financial and organizational constraints which BE experiences, it is unclear how to provide it in highly heterogeneous schools where students – as individuals and as a group – speak many different languages. Second, there is a shift in migration flows from permanent settlement of groups in bounded territories (large groups of the same people going to the same places) to temporary mobility (different people, both smaller groups and individuals, going to different places; migrants moving back and forth more readily and rapidly). Migrant flows are now more diverse, fluid, and complex, which creates new categories of temporary mobile students. BE programs in the traditional sense may not be adequate to target these new migrant students, including their diverse languages, whose presence makes school and class populations more complex and constantly shifting. Third, the study of language in

superdiverse societies is currently going through a paradigm shift. By investigating the languaging practices of youth growing up in the rapidly changing urban multilingual landscapes of the late twentieth and early twenty-first century, sociolinguists and linguistic anthropologists have called into question the traditional notions of languages as unique and separate sets of features. Traditional language education programs are essentially based on these notions and uphold a normative approach, taking the learning of correct standard languages for granted while frowning upon real-life language use as “incorrect,” “impure,” or “improper” (see Jørgesen et al. in Blommaert et al. 2011). Scholarly terms referring to these real-life languaging practices include “translanguaging,” “crossing,” “heteroglossia,” “polylanguaging,” “metrolingualism,” and “new ethnicities and language” (see Blommaert and Rampton in Blommaert et al. 2011). Hence, the provision of both bilingual and monolingual education in mainstream schools is ever more challenged by students who make fluid and creative use of increasingly complex linguistic repertoires as they navigate through the multiple environments in their everyday lives. In this new context, the traditional concepts of BE and MTI may even become obsolete. Contemporary innovative projects in Western Europe have tentatively started to explore how the multilingual realities and repertoires of students in superdiverse classrooms can be exploited as didactic capital for learning in mainstream L2-dominant classrooms where teachers do not necessarily need to master the multiple home languages spoken by the students.⁸ Sierens and Van Avermaet (2014) have called this “functional multilingual learning.” This looks like a promising strategy for further development of more flexible, context-sensitive, speaker-centered models of education for multilingual speakers in highly diverse classrooms. Following the paradigm shift mentioned above, also the current practice of separating languages in BE classes may, in the future, move towards a more concurrent integrated use of multilingual language repertoires in the same lessons or classrooms.

The current abatement of official support might be a motive for new voluntary community efforts in the field of BE leading to the establishment of private schools offering a full-day bilingual/multilingual program to (not exclusively) immigrant students. In European countries with a long-standing tradition of constitutional freedom to provide education (Belgium, Denmark, Finland, Ireland, the Netherlands), such privately run schools would be in principle eligible for public funding. However, it goes without saying that the financial, legal, and organizational hurdles may be simply too high to overcome, given that low-status immigrant minorities more often than not lack the necessary power and money to sustain such actions. The official authorities or even private foundations from the countries of origin may step in to provide the necessary

⁸A recent example is the “Home Language in Education” project (2008–2013) in Ghent, Belgium. The report of the evaluation study (in Dutch) is available via http://www.diversiteitenleren.be/sites/default/files/ThuistaalInOnderwijs_Evaluatieonderzoek_Eindrapport_DEF1_maart2013.pdf. Last accessed 7 Jan 2015.

support. Yet it remains to be seen whether post-migration generations from established immigrant communities would accept such external involvement as something which really serves their linguistic and cultural interests.

Another future scenario is the integration of different types of BE: TWI in migrant languages, BE/TWI in regional languages, and CLIL (Content and Language Integrated Learning).⁹ The overall emphasis will then be on the development of multilingual competences in a variety of languages in all students, regardless of their social and linguistic backgrounds. Such a trend may also have added values, like raising the social and economic status of migrant languages and boosting the motivation of all students in learning a wider variety of languages. From an economic perspective, migrant languages may be more and more considered as an important ingredient of the professional knowledge in societies with an increasing international orientation (Extra 2013). This could help overcome the hurdle of parental or societal skepticism towards majority language children learning “undervalued” languages (Meier 2010). An official recognition of migrant languages, giving them an equal status to national (and regional) EU languages, might be a necessary step to urge their inclusion as equivalent media of teaching and learning in future BE programs.

In conclusion, we may reasonably surmise that in the future BE will be a more generalized option in the education sectors of Western European countries. However, whether migrant languages will be a legitimate and permanent part of the prospective educational landscape in Western Europe is an open question. Perhaps a revival can only be expected to come from below. If this indeed would take place, then the history of BE in migrant languages in Western Europe in a way will have come full circle: a bottom-up movement at the beginning which in the long run has not been able to become firmly anchored in top-down educational policies at the national level but in future will reemerge in the shape of new local and grassroots initiatives.

Cross-References

- ▶ [Bilingual Education Policy](#)
- ▶ [Key Concepts in Bilingual Education](#)
- ▶ [Sociopolitical Issues in Bilingual Education](#)
- ▶ [Translanguaging in Bilingual Education](#)

⁹CLIL is an umbrella term that could encompass a range of situations related to the experience of learning nonlanguage subjects through a foreign language (Marsh 2012). It targets majority language students and usually includes prestigious foreign languages such as English, French, or Spanish.

Related Articles in the Encyclopedia of Language and Education

- G. Extra: [Language Policy and Education in the New Europe](#). In Volume: Language Policy and Political Issues in Education
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Bilingual Education in the Autonomous Regions of Spain

F. Xavier Vila, David Lasagabaster, and Fernando Ramallo

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Abstract

A historically multilingual country, Spain is today legally divided into 17 autonomous communities and 2 autonomous cities. The 1978 Spanish Constitution stipulates that Castilian – i.e., Spanish – is the official language of the Spanish

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state and that all Spaniards have the duty to know it and the right to use it. The Constitution also acknowledges Spain's multilingual character and, accordingly, confers legislative powers to the autonomous communities – by means of their statutes of autonomy – among others, in the areas of language policy and education. Every autonomous community has implemented its statute in a different way: Catalonia is officially trilingual, whereas Galicia, Navarre, the Balearic Islands, the Basque Country, and the Valencian Community are officially bilingual. Hence have Basque, Catalan, Galician, and Occitan become also official in (most of) their respective territories. The rest of the autonomous communities are officially Spanish-monolingual, even though several among them host historical minority languages such as Asturian, Aragonese, Arabic, Tamazight, or Portuguese.

Language-in-education policies in Spain have been a contended area for centuries, especially in the six territories with more than one official language. This chapter describes briefly the sociolinguistic historical backgrounds of these autonomous communities, grouped in three language areas and focuses on contemporary dimensions of bilingual education. The paper chapter ends with a short reflection on bilingual education in Spain as a whole.

Keywords

Basque • Castilian • Catalan • Galician • Spanish • Valencian • Language policy • Immersion

Catalan-Speaking Territories

Within Spain, Catalan is the native language of Catalonia, most of the Valencian Community, the Balearic Islands, as well as *la Franja* and Carxe/Carche, two small regions included in the mostly Spanish-speaking autonomous communities of Aragon and Murcia, respectively. Catalan is also spoken natively in Andorra, where it is the sole official language, the French Department of the Eastern Pyrenees and the Sardinian city of Alghero.

Historical Background

Derived from Latin, Catalan became fully standardized in the thirteenth century and knew a golden literary age until the late fifteenth century. It was the main official language of the Crown of Aragon and retained its official status in Catalonia, Valencia, and the Balearic Islands until the eighteenth century, although its position at the courts weakened in the sixteenth and seventeenth centuries, when these territories became part of the multinational empire whose capital was placed in Castile. During these centuries, education was imparted in Catalan, with Latin being used as the scientific and academic *lingua franca*.

The Spanish War of Succession (1700–1714) dissolved the Crown of Aragon and annexed its kingdoms to Castile. The new royal Bourbon dynasty launched a policy aiming at homogenizing linguistically its Empire by spreading the knowledge and use of Castilian. Education was progressively Castilianized, and a new university was created under direct supervision of Castilian authorities. These policies stretched until the twentieth century (see Ferrer i Gironès 1985; Vila i Moreno 2008).

Assimilationist policies were often resisted: teachers and pupils often used Catalan in the classrooms, and the language was officially reinstated in schools at every single episode of democracy and autonomy, such as during Catalonia's Mancomunitat (1914–1923/25) and during the Republican autonomy (1932–1939). One of the first measures taken by the Franco's Spanish military dictatorship (1936/39–1975) was to ban Catalan from schools and public spheres (Benet 1995).

The Normalization Period (1980–2000)

In the aftermath of the dictatorship, the political opposition claimed for language freedom and autonomy. During the dictatorship, Catalan speakers had all become bilingual and literate only in Castilian, and cultural infrastructures in Catalan were very weak. Besides, during Franco's rule, millions of Spanish-speaking immigrants had settled down in the Catalan-speaking territories, and language shift towards Castilian had taken place in the main cities of Valencia.

The 1978 Spanish Constitution was a compromise solution. It retained the official status of Spanish all over Spain and the duty to be proficient in it for all citizens, but also opened the door to official status of other languages (Pradilla Cardona 2011; Vila i Moreno 2011).

Catalonia was the first Catalan-speaking territory to gain autonomy (1979) and soon spearheaded the process of *linguistic normalization* (McRoberts 2001: 139–160). Catalan became a compulsory subject matter in primary and secondary education and accepted as a medium of instruction. The first immersion programs were launched. Simultaneously, teachers were progressively required to prove their ability to teach in Catalan or alternatively follow *recycling* courses.

By the mid-1980s, evidence showed that language courses alone would never make Spanish speakers bilingual, while immersion programs were giving evidence of success (Alsina et al. 1983). Following the 1983 Law of Linguistic Normalization, Catalan became the means of instruction for an increasing number of subjects for all schools, in a process that led to its being the main means of instruction all over Catalonia in the 1990s. This was the birth of the *Catalan conjunction model*, based on two principles: children should be educated together irrespective of L1 and Catalan should be the basic medium of instruction. The model represented an answer to two basic fears: societal division between descendants of natives and descendants of Spanish immigrants, and the risk of depriving Castilian speakers of access to Catalan proficiency. In 1994, the Spanish constitutional court validated this model.

The 1980s and 1990s decades also saw the progressive introduction of Aranese Occitan as a subject and a medium of instruction in the schools of Val d'Aran, an

Occitan-speaking enclave in the Catalan Pyrenees. In this region, a multilingual school model encompassing both Catalan and Castilian was introduced.

In Valencia, the recovery of Catalan was hindered by a polarization between the left, basically in favor of linguistic normalization, and the right, opposed to any language recovery and arguing that “Valencian” was a language different from Catalan. A fragile consent was built around the Statute of 1982 and the 1983 Law of Use and Teaching of Valencian: standard Catalan – with minute dialectal differences – became a compulsory subject under the label of “Valencian,” and education was organized on the basis of three different programs : (a) Program of progressive incorporation (PIP), with Castilian as the basic means of instruction; (b) Valencian-medium education, with Catalan as the means of instruction (PEV); and (c) Language immersion program (PIL), in Catalan for Castilian speakers.

In the Balearic Islands, Catalan became a compulsory subject in 1986 thanks to the Law of Linguistic Normalization, but education remained under total control of Madrid until 1992. In 1997, the Balearic Parliament passed the 92/1997 “Decree of Minimums” indicating that all schools should teach *at least 50 %* of their subjects in Catalan. In time, this percentage was widely surpassed by most schools in the Islands.

Neither in la Franja nor in Carxe was Catalan recognized as an official or even a protected language, and education remained officially Castilian-medium. In la Franja, pupils were allowed to study Catalan thanks to an agreement with the Government of Catalonia, and the vast majority took the opportunity.

The “New Immigrations” Decade (2000–2010)

Since 1999, Spain entered an economic boom fostered by the Spanish property bubble, which attracted millions of immigrants from all over the world. Simultaneously, thousands of middle class European Union citizens became established in newly founded resorts. In less than a decade, the population in the Catalan language territories rose from 11 to 13 million, and the foreign population rocketed from less than 2 % to more than 15 % (Domingo 2014).

While the middle class European Union *residents* tended to send their children to private, international schools, accommodating low-paid immigrants became a social priority. In Valencia, immigrants tended to enrol in PIP programs and did not learn Catalan. In Catalonia, the immersion program was transformed into a *new immersion* methodology developed for linguistically heterogeneous groups, and all schools were required to have their detailed Linguistic Project. The new immersion was based on the premise that language learning was a consequence of interaction with peers, not a prerequisite to get in touch with them, and had as its cornerstone the *aulas de acollida* (“welcoming classes”), a system that combined mainstreaming with partial pull-out for language and content learning reinforcement. Another initiative was the *Plans d’entorn*, i.e., the environment plans, that tried to create ties between schools and their immediate social environment to facilitate community-based learning. Some heritage programs for immigrant languages

(e.g., Arabic, Bengali, Dutch, Tamazight, etc.) were developed, usually with the support of the countries of origin and basically in the form of optional after-school classes.

By the new decade, the results of each system were obvious: according to the 2011 census, proficiency in Castilian was high everywhere, but figures for Catalan were very different. In Catalonia, 85 % of youngsters between 15 and 29 declared to be able to speak Catalan, and 81 % said they could write the language (Idescat 2014).¹ One year earlier, only 56 % of their Valencian counterparts claimed to be able to speak the language at least “rather well,” and only 51 % could write it (Generalitat Valenciana 2010; Arnau and Vila 2013).

The first part of the decade saw the recrudescence of the conflict between the central authorities and Catalonia. The Catalan Parliament passed a new Statute of Autonomy in 2006 and a new Law of Education in 2009, both enshrining the preeminence of Catalan in Catalonia’s educational system, with a large majority. But the rightist and centralist Popular Party, with just a handful of MPs in the Catalan Parliament and in the opposition in the Spanish Parliament, took both of them to the constitutional court in a move to have them declared unconstitutional.

The Evolution in the 2010s: The Perfect Storm?

The economic crisis which started in 2008 put an abrupt end to the immigration flows and diverted resources for integration to social care. In 2010, the constitutional court published its sentence about the Statute of Catalonia, reinforcing the status of Spanish, which was flatly rejected in Catalonia.

In November 2010, the *Catalanist* center-right won the elections to the Catalanian Parliament. The new educational authorities focused their attention on literacy and foreign languages, and encouraged the use of English in CLIL programs. But the sentence of the constitutional court started to have an impact and courts required Catalanian schools to use more Spanish in schools.

2011 saw the Popular Party winning the autonomic elections in May in Valencia, Balearic Islands, and Aragon, as well as in the central government elections in November. The new authorities took initiatives in language in education policies: the Valencian Government passed the 127/2012 Decree, redesigning the educational system so that all programs became multilingual, with either Catalan or Castilian as a base language and some subjects taught in the other official languages and in English. But rather than increasing plurilingualism, the new policy led to the suppression of numerous existing Valencian medium programs, which were converted into “multilingual” Castilian programs. In Aragon, the PP Government passed a new 3/2013 language law reducing the already scarce status of Catalan. In the Balearic Islands, the Parliament passed Decree 15/2013 requiring all schools to teach 1/3 of subject matters in Catalan, 1/3 in Spanish, and 1/3 in English, which

¹<http://www.idescat.cat/dequavi/?TC=444&V0=15&V1=1>

resulted in an extremely conflictive 2013–2014. Finally, the new 8/2013 law of education passed by the central government – designed, in the words of the Minister, to “turn Catalan pupils into Spaniards” – established that autonomous authorities should pay for education in Castilian in private centers if public offer was not available – but not in Catalan (see also below).

By the end of 2013, following massive demonstrations, the biggest Catalan parties agreed on holding a consultation about independence on November 9, 2014. Simultaneously, the Spanish central authorities pursued their policies of recentralization and reinforcement of Castilian. Language-in-education policies are doomed to be a relevant issue in the foreseeable future of the Catalan language area.

Basque-Speaking Territories

The Basque-speaking territories in Spain are divided into two different entities: the Basque Autonomous Community (BAC) and Navarre. The term *Basque Country*, used to encompass all the territories occupied by the Basque speech community, includes the so-called Northern Basque Country, which forms part of the French *Département de Pyrénées Atlantiques*.

Historical Background

The eighteenth century was decisive in the decline of Basque. In Spain, the absolutist Bourbon monarchy’s trend in favor of centralization (1716) reached the linguistic sphere and Castilian was introduced as the only official language. In the nineteenth century, industrialization fostered the arrival of many non-Basque-speaking workers in the new industrial towns, where more and more Basque speakers found it necessary to learn and use Castilian for the first time (Gardner 2000). Three other factors still determine the evolution of the Basque language nowadays: the small number of Basque speakers, its limited territory, and the administrative divisions.

Basque, of unknown origin and the only pre-Indo-European language to survive Latin in the Spanish State, is one of the main symbols representing Basque identity (see Hualde et al. 1995). The Basque language has historically been characterized by its minority status, surrounded by two powerful and international languages such as Spanish and French, which is the reason why all Basque speakers are nowadays bilingual.

According to 2011 data (Basque Government 2013), 2,649,000 people older than 16 live in the Basque Country as a whole, the majority of which (70.7 %) live in the BAC, 20.2 % in Navarre, and the remaining 9 % in the Northern Basque Country. This demographic imbalance means that the BAC clearly determines the reading for the Basque Country as a whole, which is why special heed will be paid to this territory.

Since Basque acquired co-official status with Spanish in 1978, many efforts have been made to revive it and prevent language loss. The repression exerted during

Franco's dictatorship had triggered a great linguistic and cultural awareness and a popular desire to recover the Basque language and culture. Consequently, Basque became a symbol of identity and of belonging to the group.

Currently, Basque (*euskera*) and Castilian (*español* or *castellano*) are co-official languages in both the BAC and Navarre. From the early 1980s, both communities began to achieve a high level of normative and managerial autonomy in the field of education. The percentage of fluent Basque speakers in the BAC is 32 –11.7 % in Navarre and 21.4 % in the Northern Basque Country – but, whereas this percentage has increased almost 8 % in the BAC and only 2.2 % in Navarre during the last two decades, it is steadily going down (5 %) in the Northern Basque Country due to the fact that Basque has no official recognition in France.

Although school education plays the main role when it comes to the process of making people Basque-speaking (the so-called *basquisation process*), literacy campaigns for adults have similarly been at the core of the recovery process of Basque. The aim has been to achieve the greatest number of bilingual people capable of expressing themselves in Basque, especially among all those who did not have the chance to study Basque or through Basque, a possibility that was not available until 1983, except for some few private *ikastolas* (Basque-medium schools) that were set up in the 1960s.

The 1983 decree establishing the use of the Basque language at preuniversity levels in the BAC set up three linguistic models: (i) *Model A*: this is a program in which Castilian is the vehicular language and Basque is only a subject (4 h per week). The L1 of the students is Spanish. Although it was originally designed to include some subjects in Basque in the last years of compulsory education, which would make it comparable with the Canadian late partial immersion, this original resolution has never been implemented; (ii) *Model B*: this is an early partial immersion program in which both Basque and Castilian are used as means of instruction. Students' L1 is usually Castilian, although some may be Basque L1. This is the most heterogeneous model (as some schools are closer to model A and others to model D, see below), and depending on different factors such as the sociolinguistic setting in which the school is located or the availability of Basque teaching staff, the time allotted to each of the languages in the curriculum may vary; (iii) *Model D*: Basque is the means of instruction, which is why it is a total immersion program for those students whose L1 is Castilian and a maintenance program for those with Basque as L1. Castilian is only taught as a subject (4–5 h per week).

In time, the two bilingual models (B and C) have become much more popular than the monolingual model A, in which students achieve a very poor command of Basque despite spending more than 12 years learning it as a subject. From the data provided in Fig. 1, it can be concluded that model A is in constant decline and today only represents 16.7 % of the whole, model B has undergone little variation, whereas model D encompasses the greatest number of students and follows a continuous upward trend.

Model D is the only one that produces balanced bilingual speakers, since its students are approximately equally fluent in Basque and Spanish. However, some students living in Spanish-speaking areas may be unable to achieve a satisfactory

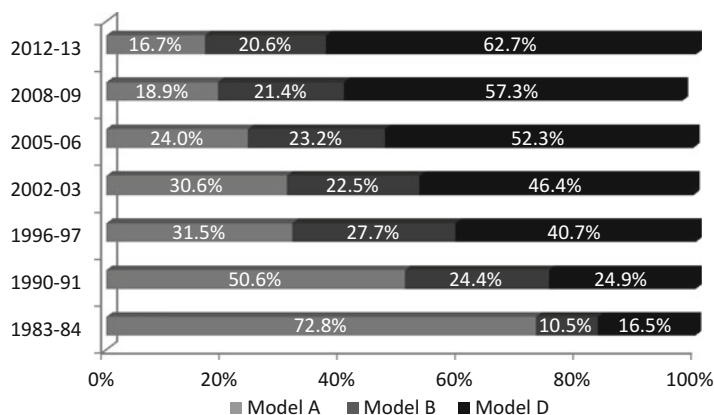


Fig. 1 Evolution of the three linguistic models at preuniversity level

command of Basque after finishing their schooling, as their contact with Basque is restricted to the school context and they hardly ever use it after school.

In Navarre, the Basque law of 1986 established the status of Basque at preuniversity level and divided this autonomous community into three linguistic zones: the bascofhone zone, the mixed zone, and the nonbascofhone zone. Basque is only officially recognized in the bascofhone zone, where around 10 % of Navarre's 537,000 inhabitants older than 16 live. The right to receive teaching in Basque is assured only in the bascofhone zone, whereas in the mixed area it is allowed on condition that there is sufficient demand, and it is very restricted in the nonbascofhone zone. As for linguistic models, in Navarre the three previous models are also found (models A, B, and C) plus model G, in which Basque is not taught at all (for more on this see Oroz and Sotés 2008). In the 2010/11 academic year, model G (71.6 %) was by far the most popular one, whereas the percentages of models D (19.3 %) and A (8.4 %) clearly lagged behind. The presence of model B classes was marginal (0.4 %).

The percentage of immigrants in the BAC (6.8 %) and Navarre (10.5 %) is lower than that in Spain as a whole (12.2 %). As far as education is concerned, in the last few years immigrant parents are favoring models B and D in primary education in the BAC and to a much lesser extent in Navarre, but they still tend to mainly enroll their children in model A in the BAC and model G in Navarre. This trend reveals that there exists an urgent need to encourage and increase immigrant students' participation in the bilingual models, as otherwise it could convey the belief that these programs are only good for the local students. By restricting immigrant students' learning of Basque, their prospects are being limited, since the lack of Basque proficiency prevents them from fully integrating in society.

Content and language integrated learning (CLIL) courses in English, that is, content subjects taught in English (any subject can be taught in English, as it depends on teacher availability) have undergone a rapid development (especially in the BAC and to a lesser extent in Navarre) in the last decade. Some voices (Basque militants

afraid of the presence of a second international language, English) complain that the efforts made in favor of the normalization of Basque may be jeopardized by the inclusion of subjects taught in English, which ineluctably reduces the space devoted to the minority language. The future challenge lies in fostering students' English proficiency while ensuring that the new CLIL approach does not have any detrimental effect on the development of Basque and students' attitudes towards it, as the few research studies available so far seem to confirm, since Basque competence and attitudes are not negatively affected (see Lasagabaster and Ruiz de Zarobe 2010). Thus, the challenge ahead lies in the incorporation of CLIL courses in the already existing bilingual programs while ensuring a balanced development of the two co-official languages in order to promote Basque through an integrated multilingual language policy.

Galician

Galician is the historical language of the Galician Autonomous Community in northwestern Spain. While spoken in parts of three other regions – Asturias, Castile and Leon, and Extremadura – only in Galicia does it have the status of a co-official language (in addition to Castilian). In Castile and Leon, the statute on autonomy recognizes the need to promote Galician in the territories in which it is spoken, whereas in Asturias and Extremadura it has no legal status. Due to large-scale migration of Galicians during the twentieth century, Galician is also spoken by significant numbers of people in several Latin American capitals.

Historical Background

From its beginnings as an independent romance language during the High Middle Ages, Galician-Portuguese (the medieval name for the language) was consolidated as an everyday language. The first written texts appeared towards the end of the twelfth century, which was when Galician-Portuguese literature emerged. The impact of Galician-Portuguese was so important that from the beginning of the thirteenth century until the middle of the fourteenth century, it was the language in which most lyric poetry was written throughout the Christian kingdoms of the Iberian Peninsula.

Language contact between Galician and Castilian also began in the thirteenth century. The major sociolinguistic consequences of that language contact arose from the sixteenth century, when a slow process of language shift began that has continued up until the present, accentuated by the progressive centralization of the Spanish state with the arrival of the Bourbon monarchy in the eighteenth century and the imposition of Castilian as the compulsory language of instruction since 1768. In the twentieth century, the most repressive period of the Franco dictatorship was between 1936 and 1960, when a series of laws were passed designed to limit the public visibility of all minority languages in Spain (Freitas 2008).

In Galicia, the most important consequence of Spain's language policy during the Franco regime was an unprecedented erosion in the intergenerational transmission of Galician. Large numbers of Galician speakers born between 1920 and 1950 did not transmit their native language to their children, thus creating a linguistic gap, a generation of Galicians that did not speak Galician fluently. By 1975, once the groundwork to partially restore the rights of Galician speakers had been laid, there had been a significant decrease in the number of people speaking Galician. In addition, negative linguistic attitudes by Galicians themselves further eroded the use of Galician's historical language.

Bilingualism and Education

With the passage of the Language Normalization Act of 1983, the Galician educational system launched a unique model of bilingualism, called *conjunction of languages*, with both Galician and Castilian as the languages of instruction in all levels of education except in preschool, where the main language of instruction is the L1 of most students. That model was compulsory in all public schools. The main objective of the model was to ensure that all the students, regardless of their L1, acquired a similar level of competency in both Galician and Castilian by the end of their secondary school education. Both languages are used in the same classroom. In fact, the model does not allow students to be separated based on their native language. Also given the current state of legislation in Galicia, it is not possible to implement a Galician-language immersion program in areas where Castilian is the main language of interaction and socialization, as is the case in most Galician cities.

Over the last three decades, the *conjunction of languages* model has been implemented in different programs, some of which can hardly be considered bilingual because most instruction was in Castilian. Although the use of Galician in the school curriculum is fully accepted by the educational community, each change of government administration brings with it a change in language policy. This has led to a tense debate over the role of the two languages in Galician society. Often bilingualism is perceived as a political problem by political parties, without considering the consequences this has on society. For example, the positive effects of bilingualism are often dismissed when Galician is one of the languages being taught in the school system.

Until 2010 regulations established that in Galicia courses in Galician and Castilian were both mandatory for a minimum of subjects per week but left the schools considerable discretion to determine the language of instruction for the remaining subjects. This regulation changed with Executive Order 79/2010 on multilingualism in nonuniversity education in Galicia, which imposes a 50/50 Galician-Castilian split in the number of hours taught in the two co-official languages, or, in the case of trilingual schools, a one 33/33/33 Galician-Castilian-English. This regulation does not apply to preschool education.

In preschool education, the languages of instruction are Galician and Castilian. The curriculum requires teachers to use the native language of the majority of the

students in a given class. Given the geographic stratification of the two languages in Galicia, this means that the use of Galician is residual in schools located in the cities. In primary school, Castilian must be used to teach mathematics. Galician is to be used to teach a subject called “knowledge of the environment” (which deals with geography, history, and the natural sciences). For the remaining subjects, the aim is to achieve a 50–50 split between Galician and Spanish in the number of hours of instruction. In secondary schools, Galician must be used both in the social and natural sciences, and Spanish must be used in mathematics and computer science.

There is very little data available on the degree to which the model’s objective of ensuring that students acquire a similar level of competence in both languages is in fact achieved. Research conducted at the University of Santiago de Compostela concluded that high school students’ competency levels in Galician are lower than in Spanish (Silva Valdivia 2010).

The teaching of Galician in the other autonomous communities where it is spoken is very uneven. In the regions of Bierzo and Sanabria in Castile and Leon, some subjects are taught in Galician in nonuniversity education but only if parents want it. In some schools in western Asturias, where Galician-Asturian (the autoglotonym) is spoken, the instruction of Galician is an elective rather than a required course. In Extremadura there is no instruction of Fala, the autoglotonym.

Finally, it should be noted that although educational authority has been transferred to the autonomous communities, central regulations issued by the Spanish Parliament still require uniform content in all autonomous communities. Exercising those powers, in 2013 the right-wing Popular Party, which enjoyed an absolute majority in Parliament, was able to get a new educational law passed. One of the most important changes this law brought about was a reinforcement of Castilian-language teaching in all schools in officially bilingual autonomous communities.

Conclusions

Language-in-education policies have been controversial in Spain for centuries. In the last three decades, Spain’s plurilingual autonomous communities have officially espoused the goal of high levels of bilingualism and biliteracy for their entire populations, a goal that is recently evolving towards that of generalized trilingualism. This evolution has also been endorsed by the central authorities. As a result, very few political actors now claim to be in favor of monolingualism.

On the ground, though, things are more complex. On the one hand, most educational systems do not manage all students to achieve a high level of bilingualism and biliteracy. During the twentieth century, Castilian has become a ubiquitous linguistic resource that is vastly predominant in everyday life, mass media, and consumption, also in the officially bilingual communities. As a consequence, Castilian-medium or “balanced” bilingual programs rarely achieve the goal of high-level bilingualism and biliteracy, especially as far as Castilian L1 speakers are concerned. This goal is only obtained by those educational models where the local language is the predominant means of instruction, that is, when the school

manages to compensate the overwhelming presence of Spanish out of school. This fact is nevertheless often disregarded by wide sectors of Spain's Castilian monolingual majority who cling to the idea that they have the right to L1 monolingual education even in the bilingual territories, leading to periodical political clashes with sectors concerned with the future of the territorial languages. The fact that the central authorities retain ample legislative powers in the educational sphere, and often use them in favor of Castilian, exacerbates these conflicts.

Bilingual education in Spain's multilingual autonomous communities faces a number of challenges. The first one remains that of achieving generalized bilingualism which is still not reached in all territories. Second, it remains to be seen whether educational systems can effectively contribute to the promotion of out-of-school use of the historically minoritized languages. Results in this area so far are not encouraging. Third, wide sectors of society are demanding that proficiency in foreign languages among the new generation increases. In this sense, there exists growing interest in analyzing how CLIL programs in English fit within the current bilingual education models, taking into account that these programs are often perceived as competitors with the minority language. It should not be forgotten that the Balearic, Valencian, and Galician governments have actually used the promotion of English as an alibi to diminish the role of Catalan or Galician. Fourth, the great immigrations in the 2000s brought hundreds of languages to the schools that have so far received very marginal attention. It remains to be seen whether they can also be better accommodated in the current models. Finally, it would be desirable that the monolingual Castilian society adopted a more positive view of Spain's linguistic diversity. This may soften the pressure these programs often experience from the central and even some autonomous authorities and open larger tracts of Spain's society to the benefits of plurilingualism.

Cross-References

- ▶ [Bilingual Education in Europe: Dominant Languages](#)
- ▶ [Sociopolitical Issues in Bilingual Education](#)
- ▶ [Bilingual Education Policy](#)

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